



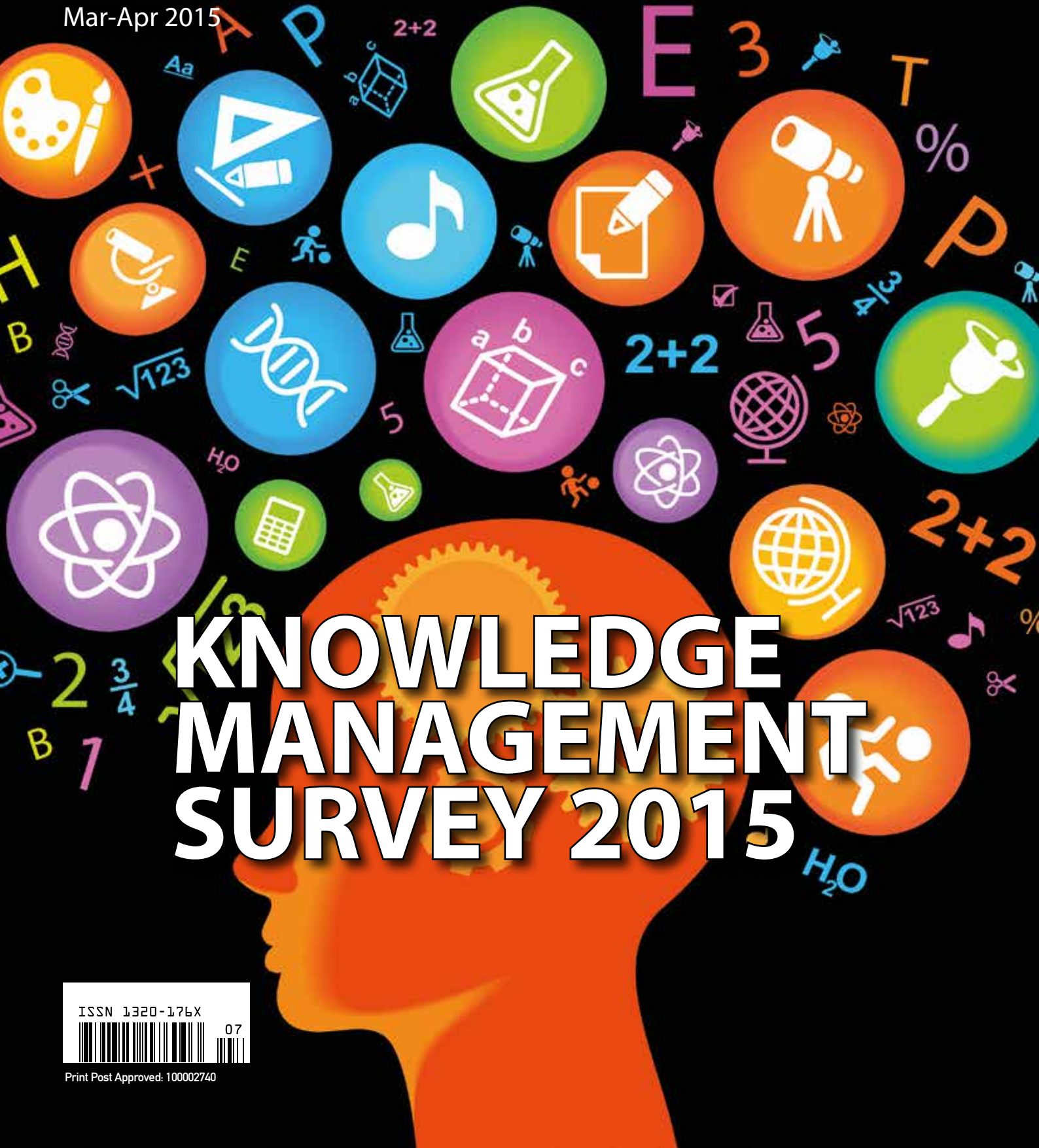
IMAGE & DATA MANAGER

Mar-Apr 2015

Hillary Clinton's email blues

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Lexmark announces \$US1B Kofax buyout

A \$US1B buyout of leading enterprise capture vendor Kofax by Lexmark adds more weight to the capture and workflow software holdings of its Perceptive subsidiary, following earlier acquisitions ReadSoft and Brainware. It also potentially brings into play the huge channel network of over 850 partners that Kofax has established worldwide in raising the profile of Perceptive's full suite of information management software.

Many of Kofax's partners compete with the Lexmark/Perceptive offerings, so there will be some sensitivities to be handled here.

Paul Rooke, Lexmark chairman and CEO, claims the merger will result in more channel solutions.

"Our customers will have a breadth of hardware and software solutions that connect their information silos and automate their business processes - enabling them to access the most relevant information at the moment they need it to drive business forward," he said.

The Kofax purchase effectively doubles the size of Lexmark's enterprise software business to nearly \$US700 million annual turnover.

While it is widely perceived that Perceptive will benefit from Kofax's global presence, some have questioned how successfully Kofax has integrated its acquisitions, and how Lexmark and Perceptive can improve this integration.

"The combination of Perceptive Software and Kofax solutions strengthens the breadth and depth of our offering, giving us an unmatched ability to help customers of all sizes, in all industries and across the globe to connect unstructured information to their systems of record," said Scott Coons, Perceptive Software president and chief executive officer and Lexmark vice president. Lexmark entered the ECM market with the 2010 acquisition of Perceptive for \$US280 million.

US industry analyst Paul Carman, in a company blog, observed that "... large ECM and BPM players who rely on Kofax Capture now find themselves in a very awkward position. For example, Xerox announced a major partnership with Kofax in January, yet they do not sell Perceptive solutions - and in fact compete with Lexmark in the managed print services (MPS) market. Konica Minolta, another Lexmark MPS competitor, just received a partner award from Kofax, but they are also partnered with Hyland, not Perceptive. This also has a major impact on Hyland, especially in light of their counter offers for ReadSoft some months ago."

Konica Minolta acquires OpenText duo

Konica Minolta Business Solutions Australia has acquired two leading Australian solution providers specialising in OpenText Enterprise Content Management and Digital solutions, Knowledge Partners and Stonebridge Systems.

Shane Blandford, Konica Minolta's Director of Strategic Business Expansion, said that the company was intending to remain product agnostic, and existing relationships with other software vendors such as Hyland, Filebound and ABBYY would remain unaffected by the new acquisitions.

"We will be not different to any other IT services company from that perspective," he added.

"In the US Hyland is very strong in the insurance vertical, while OpenText is very strong with SAP. With different products we are able to segment the marketplace and have a much deeper engagement with our customers with the correct product outcome.

"Our organisation at this point has decided not to go down the road of acquiring software companies. We are a technology company with our own R&D in hardware and materials. These acquisitions have been made by Konica Minolta Business Solutions Australia to help us quickly grow the capability of being able to provide these services in the marketplace. We now have definite value ads for our government and business clients linked to scanning and our MFDs and in business process improvement.

"Some of our local competitors have purchased managed IT services companies, managing networks servers and desktops, ours is a different strategy," said Blandford.

"Market research we have done and anecdotal research from our customers tells us a number of things very clearly. Firstly there isn't a business out there that is not trying to remove costs from their operations. There is not a business out there that's not trying to have a closer customer experience and engagement, or one that's not impacted by security and governance issues today.

"When we put those three things together with the exponential growth of digital content, it says that managed services for content is a very strong growing market and one that most medium to large scale business and government are embracing or will be embracing very soon."

DSS seeks text analytics solution

The Department of Social Services (DSS) wants to bring unstructured data in from the cold, issuing a request for tender for a new analytics solution that includes text heavy content in addition to the millions of transactional records it has stored in Teradata, Oracle and SQL Server databases.

According to tender documents, it wants to enable analytics across both structured and unstructured data from a range of sources both within and outside the department.

The DSS is the Australian Government's main source of advice on social policy and manages about one fifth of the federal budget. It currently employs approximately 5,000 staff

Analytics within the Department is primarily performed utilising the SAS software toolsets. After conducting a review of its data reporting and analytics functions in late 2014 it concluded there were several gaps. It now wants to implement a new Analytic Data Platform (ADP) which will introduce a consistent method to acquire data from a range of transactional and data warehouse sources. It also wants to "enhance the depth of analytic insights by providing new semi-structured and unstructured formats and styles of data" and is open to cloud solutions hosted in Australia.

Current business intelligence apps used inside the DSS include Cognos 10.2.1, SAS, SAP (Business Objects) and Microsoft Reporting and Analysis Services. It is hoping to roll out a solution from 1 July 2015.



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Adobe Document Cloud takes flight

Acrobat DC, a new product from Adobe, has been launched at the heart of the company's new Adobe Document Cloud. It delivers free e-signing as part of the integrated solution, via eSign Services (formerly Adobe EchoSign), to allow users to electronically send and sign any document from any device for no additional cost.

Adobe Document Cloud consists of a set of integrated services that use a consistent online profile and personal document hub. Adobe says users will be able to create, review, approve, sign and track documents whether on a desktop or mobile device. Acrobat DC, with a touch-enabled user interface, will be available both via subscription and one-time purchase.

Users can begin working on a document on one device and then pick up where they left off on another device using a new technology called Mobile Link.

In order to get paper documents easily into digital form, the mobile version of Acrobat DC uses the device's camera and then transforms that picture into a fully addressable PDF document.

Acrobat DC uses Photoshop imaging technology to convert any paper document into a digital, editable file that can be sent for signature. Acrobat DC can open a scanned image and determine the text regions via image processing techniques.

Acrobat DC then dynamically creates "synthesised" fonts to help preserve the look-and-feel. This solution scales across different image resolutions and works on multiple languages.

It also aims to address problems with scanned images and documents that were captured via tablet or phone. These images frequently suffer from incorrect perspectives, shadows and tough lighting, often making them unusable. Acrobat DC introduces a solution to transform these images into a digital document suitable for reuse, extraction, and archival.

Powered by image processing techniques from Adobe Photoshop, Acrobat DC performs automatic text improvement, background noise and shadow removal, and intuitive cleaning controls – all without any degradation.

For enterprise users, the e-Sign capabilities of the Document Cloud offer native support and integration for salesforce.com, Office 365 and Microsoft Dynamics, among other line of business systems.

A personal "Document Profile" is able to be created which saves your signature, and enables you to save data securely in a personal autofill collection.

Two new mobile apps, Adobe Acrobat mobile and Adobe Fill & Sign DC, allow for creation, editing, comment and signing of documents directly on a mobile devices.

Acrobat customers will automatically receive new Acrobat DC and the Document Cloud as soon as it is available. Acrobat DC will be sold as both a subscription and a perpetual license upon availability.

What do Information Managers actually do?

Making the most of information is a priority for many organisations. However, a new study from storage and information management company, Iron Mountain shows that a lack of understanding between those who manage and those who use information is making it harder to achieve this goal.

The study found that 83 per cent of European business leaders don't fully understand what their information managers do. In return, 69 per cent of European records and information managers admit they don't know exactly what senior business leaders want and need from information – with 76 per cent confused about the information needs of colleagues in marketing, manufacturing, finance and other departments.

The study shows just one in ten (12%) of the business leaders surveyed had complete confidence in their organisation's ability to extract the full value from its information.

"In today's knowledge-driven world our study has revealed an unexpected obstacle on the road towards return on information," said Sue Trombley, a director at Iron Mountain. That obstacle does indeed seem to be a massive lack of understanding in companies about what information managers actually do, or perhaps, cannot do.

"Business leaders need to better understand what records and information managers can contribute; at the same time information professionals need to align more closely with business needs," said Trombley.

These trends and their impact are echoed elsewhere, with one global study finding that just 27 per cent of firms say their employees have access to the data they need, and 42 per cent admit that access to their data is cumbersome.

The survey quizzed business decision makers and records and information managers at 900 organisations with between 250 and 999 employees, within the healthcare, public sector, retail, legal, financial services/insurance, pharmaceutical, manufacturing and energy sectors, in the UK, France, Spain, the Netherlands and Germany and in the US.

On top of this, the survey also found that two thirds of business leaders are confused about the information needs of colleagues in marketing, manufacturing and finance.

Trombley said, "The gap is created by a lack of understanding and poor communication rather than inability to deliver."

The full research can be found at http://berkeleypr.eu/Iron_Mountain_Return_on_information_infographic.pdf

Konica Minolta debuts WeOptimise

FileBound Australia has announced that the FileBound document and workflow automation software is the first offering in Konica Minolta Business Solutions Australia's WeOptimise Cloud, a private cloud that hosts SaaS (software as a service) solutions.

Konica Minolta partnered with FileBound to provide a cloud-native document and workflow application that includes:

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- Improved business processes through automation controls
- Operational cost reduction through improved efficiencies
- Reduced legal and financial risk for non-compliance
- Environmental sustainability
- Better management insight into employee productivity through reporting.

"We're proud to be the first service offered in the WeOptimise Cloud," said Lee Bourke, Chief Executive Officer of FileBound Australia.

"We see a growing demand around the Asia Pacific region for cloud-based applications that reduce complexity and deliver quicker return on investment in enterprise content management and other technologies."

"WeOptimise Cloud services is a further example of Konica Minolta building on its award-winning multifunction printers to deliver services that help customers reduce costs, increase productivity, improve data security and greater sustainability," said Stevan Caldwell, Marketing Director at Konica Minolta.

The WeOptimise Data Center is hosted in Australia, ensuring data sovereignty and offering world-class security. It is a critical component of the company's Transformation 2016 three-year development plan to help the business meet tomorrow's customer needs and grow its market share.

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Brisbane Airport trials Australia's first Digital Departure Card



Brisbane Airport has begun a trial of a Digital Departure Card for international passengers, removing the age old necessity of hand writing the official 'outgoing passenger card' (Departure Card) required for immigration purposes.

Developed in-house with support from a number of partners, the new Digital Departure Card is Australia's first and built within the scope of BNE's mobile App, giving passengers the ability to enter and save personal information for the Departure Card onto their mobile device prior to their arrival at the airport.

This information is converted into a QR code that is scanned and printed at bespoke kiosks located in the International Terminal. The personalised and custom printed card is then signed by the passenger and collected by Customs officers during the normal departure process.

Passengers are also able to save their profiles (as well as the profiles of other family members with permission) within the app so that they do not have to complete their personal information every time they travel internationally from BNE.

Julianne Alroe, Brisbane Airport Corporation (BAC) CEO and Managing Director, said close collaboration with external partners enabled BAC to implement world first digital initiatives.

"We are fortunate to have a long association with Queensland University of Technology (QUT) and it was a team of QUT Interactive and Visual Design students who came up with the initial idea of digitalising the Departure Card process as part of a practical assessment.

"We are also very grateful of the enthusiastic support given by the Australian Customs Service and Department of Immigration and Border Protection, which both recognised the huge potential of this initiative.

"We saw great potential in the idea and with approval from the Department to proceed, BAC provided the capital and resources to develop the program and necessary infrastructure, as well as ensuring all boxes were ticked from a practical, logistical and legislative perspective.

"The result is an Australian if not a world first digital solution that will save time, streamline processing and help reduce anxiety associated with departure formalities, especially for non-English speaking travellers," Ms Alroe said.

Alexander Dreiling, Associate Professor and Chair in Airport Innovation at QUT, said Creative Industries students were tasked with identifying a way in which the passenger experience could be improved.

"Filling out arrival and departure cards stood out as being a process that some people struggled with, particularly those who didn't speak or read English," Professor Dreiling said.

"Filling in data for the arrival or departure cards on the BAC App in advance, rather than filling it in on the cards at the airport makes the process easy whether someone is a frequent international flyer or a sometime traveller, regardless of age or language," Professor Dreiling said.

On successful completion of the trial, the Digital Departure Card prototype will allow performance measurement and the ability to refine the design for future large scale releases.

Objective adopts Azure cloud

Objective Corporation has announced that Microsoft Azure will be adopted as the cloud platform for Objective's content, collaboration and process management solutions, globally. The company says this positions Objective as one of the largest Independent Software Vendors (ISV) in Australia to embrace the Microsoft Azure platform.

"There was a natural alignment between the focus and strategy direction of both Objective and Microsoft," said Tony Walls, CEO Objective Corporation.

"Objective has a long list of customers in the public sector and regulated industries, many of which are investigating both how to move to the cloud and to embrace the potential of Microsoft Office 365. This partnership is also about global reach," added Walls, "Having established a core user base globally, we can use that footprint to grow our business in key verticals and geographies in partnership with an organisation whose breadth of technology, market coverage and partner ecosystem is peerless."

Objective's flagship Enterprise Content Management (ECM) solution, which manages documents and information-driven business processes, is now being offered on Microsoft Azure.

The Objective Connect solution for Asia Pacific is now live on the Microsoft Azure platform. Objective Connect is used by security-conscious organisations, in more than 60 countries, to exchange sensitive information between key corporate systems and external stakeholders.

Storage boost puts 220TB in your hand

IBM and Fujifilm have demonstrated a next generation tape storage system that can fit 220TB of data on a palm-sized tape, showing its viability as a long-term storage medium.

The companies say this new record demonstrates that computer tape – a storage medium invented in 1952 with an initial capacity of about 2 megabytes per reel – continues to be an ideal technology not just for storing enormous amounts of back-up and archival data, but for new applications such as Big Data and cloud computing.

The record setting demonstration is an 88 fold improvement over an LTO6 cartridge, the latest industry-standard magnetic tape product, and a 22 fold improvement over IBM's current enterprise class tape product.

Today more than 500 exabytes of data reside in tape storage systems, according to IT analyst firm Coughlin Associates.

The record was achieved using a new, advanced prototype tape developed by FUJIFILM Corporation of Japan, in collaboration with IBM scientists.

The new technologies won't come out in products for several years and may not be quite as extreme when they do, but the advances show tape can keep getting more dense into the future, said Mark Lantz, manager of IBM's Advanced Tape Technologies Group.

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KNOWLEDGE MANAGEMENT SURVEY 2015

What is knowledge management? This question has triggered a thousand on-line arguments and finding agreement on a single definition is a never-ending challenge. Ask the question and you might get answers like "manage, plan, deploy, collect and spread knowledge in an organisation, and do it in a planned manner", and "to create, store, survey, use and revise knowledge".

A survey of IDM's readers found definite agreement on at least one thing, that the end goal of knowledge management should be "better decision-making".

It's perhaps unsurprising that of almost 90% of those surveyed, the bulk of whom came from medium to large enterprise and government organisations, right choices by knowledge workers emerged as the Holy Grail.

After all, we all know where wrong choices lead.

"KM is seen as irrelevant," despaired one of our survey respondents, "In fact it is more relevant today than ever given enterprise applications, mobility and diverse teams"

Organisations know they need to enable knowledge transfer, but far fewer are engaging employees who possess critical knowledge, walking them through a consistent documentation and sharing process, and creating meaningful learning opportunities for knowledge recipients.

Content management and findability continue to be key focus areas for KM.

The types of initiatives that IDM readers are underway with in a quest to improve on their KM practices include rollouts or upgrades of SharePoint intranets, cloud-accessible process mapping, improved collaboration, communities of practice (COPS), Enterprise

Search and People and Expertise directories.

One major Australian oil and gas exploration and production company with operations across the globe is trialling the use of Yammer for collaboration and idea exchange and using SharePoint for sharing and management of corporate information.

"KM initiatives are aimed at enabling the sharing of information freely and accessing knowledge and expertise through the use of CoPs sites. It helps the organisation in being able to access the many years of experience of key technical staff," said the organisation's Enterprise Systems Project Manager.

"The challenge is for staff being able to find the time to contribute and leverage the knowledge/information repositories and having technology systems that are intuitive putting the right information that their fingertips, instead of having to wade through the sea of information spam."

Collaboration is the new normal

Technology is making it easier to integrate systems and connect across traditional boundaries, and social media has boosted people's expectations for interaction and feedback. The result is that collaboration across the extended value chain is becoming the new normal.

"I think one of the biggest issues around knowledge is what we think we know but don't," said one knowledge manager at a large multinational.

"We have multiple capabilities for publishing details of what we think we know but these are not utilised. I have seen people shy away from sharing knowledge and speaking up as a more confident and yet less skilled individual disagrees with them.

"There is also a fair gap between knowledge of the theoretical and knowledge of how things actually work. It is easy to say we should

assign metadata to information to increase its discovery but if that metadata should really be more of a folksonomy, some systems and approaches are far too restrictive to enable this. Semantics is also a big issue."

The multinational is trying multiple approaches including Share-Point for an intranet, collaboration and blogs. Enterprise search is on the wish list for the Documentum user.

"We need better skill sharing across the globe and an increase in accountability. With a global organisation rumours are rife, the social collaboration platform, Jive, had enabled confirmation of the basis of the rumours. System and process support is also moving into a collaborative approach."

There are big changes ahead for the scope of knowledge sharing opportunities, when and where we access knowledge, and the toolkit for surfacing relevant information and expertise.

"The introduction of wikis has facilitated to some extent a collaborative tool; however, enterprise search engines tend to negate this initiative as it harvests more than aggregates knowledge pools," noted a records manager at a leading Australian university.

"While Communities of Practice have been established their influence is minimal or restricted to areas rather than enterprise wide."

"Knowledge management has probably lost it momentum as the so called measurement tools are really measuring best practice which in turn is an average. Perhaps the approach should be along the lines of "Communities of Process" where there is a common objective but various degrees and level of participation but collectively provide a knowledge pool," he observed.

Setting up a wiki is often easy from a technology perspective, as many content management suites include the necessary tools, but getting authors and editors engaged may prove more daunting.

One IDM reader at a large Victorian government agency com-



What should be the end goal of an organisation's KM strategies?

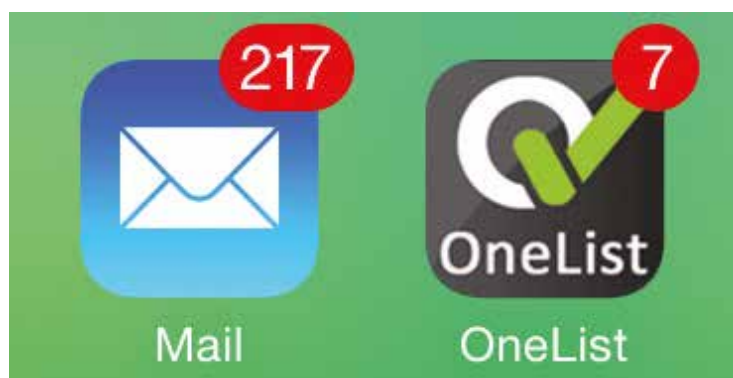
plains "Although a knowledge based business, the systems to support KM are not a core investment and the government trend is to reduce investment overall. There is a general lack of deep skills in KM. Holistic approaches are required to manage the processes that connect tacit, explicit and "potential knowledge"

The agency has adopted SharePoint for a staff intranet and to provide collaboration tools, enhanced by staff blogs on Yammer. It also employs a range of software and systems that support

(Continued over)

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KM including metadata databases, standardised approaches to managing structuring, storing and with new work on management of release.

"KM ensures past research and work outputs can be integrated and accessed for future leverage. It is also critical in capturing required knowledge to ensure services and research findings in particular are defensible, recoverable and able to be exchanged."

Matt Moore, manager in market operations at PricewaterhouseCoopers, thinks that knowledge managers need to pay attention to the emergent application of ideas from cognitive science and behavioural economics to the business world.

In Australia, he has seen organisations start to hire individuals with cognitive science and behavioural economics backgrounds, and they've begun to apply these approaches to "policy implementation, business improvement, and product development."

Moore added, "If the KM community is just looking to manage SharePoint sites or Yammer communities and isn't into this stuff, then we'll be in even more trouble than we are now."

One Australian Water Utility is linking Intranet documents from HP TRIM to the intranet to ensure most current versions are accessed.

"We are currently considering a project to clean up and move data from network drives and exchange server (email) into TRIM," said the utility's Records Administrator.

"KM provides lessons learned that can be used for future activities. It also saves time and reduces risk of error by compiling knowledge provided by others that have undertaken similar tasks before.

"Capitalising on the opportunities greatly depends on the organisational culture in relation to knowledge management and its value - particularly how it is viewed by those at the top."

While survey respondents were in near universal agreement as to the aim of knowledge management, opinions on the main barriers to its implementation were more diverse. Functional silos were identified as the main culprit by almost half of those surveyed, while cultural roadblocks such as an unwillingness to share knowledge and inherent lack of participation were a close second. The use of legacy systems is often cited as a major obstacle by vendors of KM solutions but less than a quarter of those surveyed saw that as a problem.

"You have to have all staff on board to be fully successful. It's hard to turn blue collar workers into caring white collar workers," observed one respondent.

A typical approach to improving knowledge management is to implement a Community of Practice (CoP) which is aimed at learning KM lessons from around the organisation, and to help to embed good KM practices. It is also used to identify issues preventing good practice and opportunities for improvements. This can be further enhanced with the deployment of dedicated team members to work with projects to distil the 'knowledge nuggets' out of projects, and to ensure that the key knowledge is retained in a useful, enduring manner.

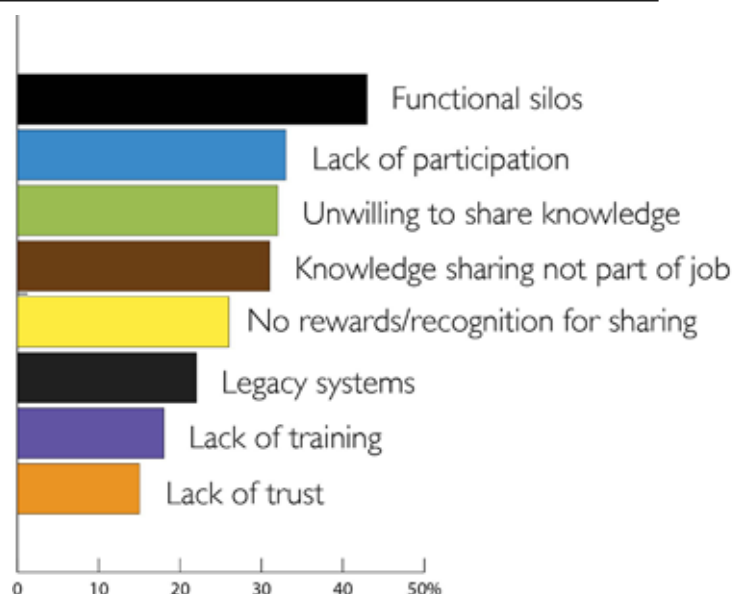
One state government records manager is convinced it's a central repository that is key.

"A single overriding environment is required which all other LOB packages use as their repository," he recommends.

The organisation presently employs an Objective EDRMS with an Intranet and Wiki

"Using our existing infrastructure we support in excess of 1,000 users providing information to over Two Million consumers. This is a vast collection of brochures and forms both paper and virtual."

One newly appointed KM Administrator in a legal department at an Australian oil and gas explorer, notes there are significant challenges with respect to 'legacy' systems and capturing back-log data. "Lack of direction from higher up the food chain can



What are the biggest barriers to knowledge retention?

also be an issue, as well as focus and objectives being communicated - broadly."

Some of the tools the organisation is utilising include the MAVIM BPM tool and SharePoint to create forums and collaborative spaces.

"We use KM to capture, develop, build and enhance information access and extractability. It aids in the development and implementation of integrated management systems; building policies, procedures, strategies, templates, etc."

The legacy problem may not just apply to longstanding technology platforms, it can also apply to staff.

"I think there are challenges when it comes to organisations that tend to retain staff for long periods of time," observed one local government records manager.

"It's quite difficult making the transition into good records/information/knowledge management by all because traditionally we were an administrative heavy organisation with basically every department of the organisation having their own admin team. As result of this the people that have been in the organisation for 20+ years are often very unwilling to perform even basic tasks such as writing and posting letters, registering their own documents into the corporate EDRMS, and creating procedures for what they do, etc."

Implementing Enterprise Search and metadata is not a panacea warns one of our survey respondents.

"If search and metadata are executed poorly, the requirement for structured, consistent indexing often negates the flexibility required to cater for the ever expanding types of knowledge collateral."

Change management and system processes need to be as efficient and easy to use and possible or else adoption will need to be forced as the value is not readily apparent, warned another

"People need to appreciate the cost of poor knowledge capture and sharing and be made accountable for managing the knowledge assets they create or receive."

One of the main facts playing against successful KM initiatives could be as one Information Manager points out, "I think a major problem is "business" as in we are all too busy"

"KM is becoming critical as more employees retire and the workforce ages. The critical point is to capture by knowledge transfer especially tacit knowledge," commented one NSW state government agency respondent. "However the challenge is gaining staff buy-in to use the systems and getting them to understand the need to record and transfer knowledge"

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Knowledge Management in a Global Enterprise

By Neal Goodman

What happens when large corporations have gained valuable global and intercultural knowledge, learned hard lessons, and overcome major obstacles - yet have no central repository in which to capture that information?

In the best-case scenario, they needlessly spend money on training and development to gain knowledge that they already have. In the worst case scenario, they repeat old mistakes. The larger the company, the more information they don't know they have.

It goes something like this: Department A decides it needs to better understand how to sell its services to Japanese companies. It commissions a study and hires external consultants to teach its employees what they need to know. On the face of it, this is a wise investment. Unfortunately, they didn't know that Department B already has expertise in this area. A great deal of time and money has been wasted.

According to Delphi Group, employees spend 7 percent to 20 percent of their time on the job replicating existing solutions for others. Ernst & Young reports that 44 percent of employees are poor or very poor at transferring knowledge. These statistics—which are just the tip of the iceberg—can translate to process redundancy, subpar performance, marketing mistakes and

inconsistencies, customer defection, low employee retention, and revenue loss.

Many multinational companies are now beginning to realize that if they are involved in multiple training and development programs to support their globalization efforts, they need to develop a centralized system to capture their collective global intelligence.

Challenges

When companies are ready to commit to a knowledge management system, they should be prepared to face the following challenges.

Poor data quality. It's not uncommon that an organization's existing electronic data are not entirely accurate or complete. Companies should not only adopt new data collection and maintenance standards, but also cleanse their existing databases.

Complications arising from internal organizational structure. In large corporations, divisions and departments typically maintain versions of the same data, categorized in different ways. Company-wide data storage protocols will be necessary for effective knowledge management.

A common impediment to knowledge management in some cultures, such as the United States, is a "bias for action"—favoring action over reflection—that often causes knowledge management efforts to drop on the list of business priorities.

Knowledge management done right

Here are a few examples of how organizations can benefit from a successful knowledge management system.

First-round interviews for a position with a multinational corporation are conducted over the phone by US-based recruiters. The candidates are located all over the world. The recruiters know, prior to each interview, to go into the company's knowledge management system to review information on cultural nuances that could influence - for better or worse - how they view the candidate.

Companies expanding across borders must corral their knowledge

So when the American recruiter calls a British candidate's former manager for a reference and hears the former manager say that the candidate's performance was "fine," the American recruiter, who might have otherwise considered "fine" to be faint praise, now understands that evaluative terminology tends to be relatively understated in the United Kingdom. When the same American hiring manager extends an offer to a Japanese candidate and the initial response is "yes," the manager understands that may really mean, "I hear your offer and I will consider it."

A German company is planning a new venture in Russia. The project lead asks his team to explore the organisation's knowledge management database, where they find a wealth of information about Russian culture, as well as information on employees who have worked in Russia and are willing to serve as advisors to the project team.

An executive has been advised to undertake an international assignment to enhance her candidacy for a global leadership position. The company's knowledge management system assists the executive with selecting an international assignment, presents a two-year blended learning curriculum to support her in the assignment, provides access to lessons learned from previous international executives, and matches her with an executive mentor.

Knowledge management done wrong

Those were all examples of knowledge management done right. Unfortunately, there are many examples of organizations that suffered for not having an effective knowledge management system. Here are just a couple.

A large pharmaceutical company lost its privileged position with the Chinese government when its new drug discovery team failed to ask for an informational meeting with the outgoing team. This was the second time they had made this mistake - the first time this happened, no one at the company had preserved

the mistake in a knowledge management system from which a future team could learn.

A major accounting firm lost its best customer in China because the American executive whom the firm hired to oversee its Asia division met with this customer and immediately began going over the new rate structure.

Offended that the executive hadn't first taken the time to build a friendly relationship, the customer went to a new provider the next day. A well-maintained knowledge management system would have offered information on how to build a strong relationship with the Chinese customer.

Now that you understand the benefits of having a knowledge management system, it's important to know which capabilities the system should have. The following are a good starting point.

Host a social platform that features individual employee profiles, where users can find information on employees' global challenges, personal goals, case studies, lessons learned, and contact information; and form virtual communities around common goals or interests.

Establish curriculum "paths" to core competencies. For example, a curriculum path may focus on building cross-cultural teaming excellence, while other paths could focus on developing future global leaders, negotiators, and project managers.

Create competency or career roadmaps for individual employees, and systematically track individual progress toward competency goals.

Trigger (and capture information from) coaching initiatives for employees embarking on or concluding their international assignments. These could include a predeparture discussion between the assignee and host manager to align expectations, training of the incoming assignee by the outgoing assignee, or debriefing meetings at the conclusion of the assignment.

Record lessons learned from employees' international assignments; these would be kept in a searchable database.

Capture international business challenges in the database so that employees can learn from them, collaborate on possible solutions, or research them when facing similar issues in the future.

Analyse information to identify and interpret trends, and identify process improvement opportunities.

Host blended learning courseware, including both in-house and external programs.

Managing this knowledge is essential for preserving, maintaining, and empowering the social and intellectual capital of an organization.

Neal Goodman is CEO of Global Dynamics, the company he co-founded in 1983, specialising in cultural competence and virtual workforce effectiveness for global corporations.



Is your knowledge lost in information?

By Alex Dean

Have you ever asked a colleague for an answer to your question? If you're lucky, you knew who was going to have the answer. Chances are you sent them an email. Chances further, they will have it and they'll send you a reply saying, "Yes, here's the answer to your question." And six months later, that email is buried somewhere amongst your mass of emails.

Does anybody else in the organisation have access to that email? You hope not. However that also means nobody else can benefit from that knowledge.

So what happens when the situation isn't quite that simple and you're not lucky enough to know who has the answer?

Most organisations discourage us from sending blanket all@xyz.com emails and the paradigm, 'email is where knowledge goes to die' still rings true in many organisations, of all sizes and nature.

So how can organisations start utilising the tools available to them to start capturing and generating knowledge and access knowledge from all sources in your organisation?

Using email as a knowledge and collaboration communication tool is far from ideal and that's why different platforms have started developing other mechanisms to generate and capture knowledge. You want to be able to get the answers to your questions; but, most importantly, you want to be able to share those answers with other colleagues so that they too can use that knowledge.

And, most importantly, you want to make sure that you can get the answer from people that you don't even know might have it.

Social tools

Organisations are increasingly looking to social communication tools precisely for that purpose. Now, I'm not talking about posting an update on Facebook. I'm not talking about sending out a Tweet.

What I'm talking about is having a forum for your staff to be able to freely ask specific work-related questions, problems that they're trying to solve, and finding not only the people who have the answers, but actually getting those precise answers. The best platform to get these tools is an Intranet.

Having a social communications tool on an enterprise intranet is not a one-way tool for marketing or HR policies, but rather a

communication tool that allows people to connect with subject matter experts, share similar projects and share tasks, all within the organisation. Those are the tools that are going to allow your organisation to capture knowledge and most importantly, grow knowledge within your organisation.

When you provide a tool for information to be shared and generated like this, answers can be searched, saved and better yet, liked. Each single like, of course, means that that answer has been evaluated and approved.

In an age of information overload, trying to sift through that information and figure out what's valuable and what's not is becoming harder by the minute. Being able to harness this information, share it and appraise it provides streamlined access to the 'nuggets' of information that every organisation is looking for.

So, when you're looking at harnessing and capturing knowledge, when you're looking at growing knowledge, when you're looking at using it for a competitive advantage within the marketplace, organisations are turning to social tools like Yammer, SocialCast and SharePoint newsfeeds.

All these tools will not only enable you to capture and search knowledge that's sitting within the organisation, but most importantly, foster and grow that.

Top tips to implementing a successful enterprise social tool

• Educate staff about the different tools available and their purposes

Don't assume that people understand when they should be sending an email, an instant message or a social message, because it's not obvious. They will get it wrong half the time. It's fine to get it wrong as long as they can then start seeing the value of using the right tool at the right time.

• Encourage staff to ask questions

Replace "all-staff" emails with posts to the company newsfeed. This way staff are encouraged to ask organisation-wide questions and avoid the answer being lost in someone's inbox.

Once an answer is found, selecting a "best reply" can result in an instant transformation of information to knowledge, stored within your organisation's corporate knowledge forever.

Encourage it. Encourage people to share. Encourage people to create new knowledge by assigning tags, by assigning badges. Acknowledge staff efforts, celebrate their successes, and celebrate the knowledge sharing that can be going on.

• Have a top-down approach

A change management campaign will require several steps. First of all, it requires top down involvement. You need your executives, your CEOs, CIOs, CFOs and Marketing Managers to be communicating on these tools.

They need to lead the way on how it's to be done. Have them post at the beginning so that people understand what kind of topics, what kind of questions and what kind of needs are being served with this tool. Have them encourage people to respond. The more people respond, the more people will feel comfortable with using it as a tool to ask questions and, most importantly, deliver answers.

• Provide a powerful search engine

Having all of this knowledge and not searching on it is a hugely wasted opportunity. You have to actively encourage people to search for knowledge. Got a question? Type the question into the search box first. Make sure people understand that they have a powerful search engine that can give them the answers before even asking them. Maybe somebody's already given the answer six months ago and you really want to make sure that you can leverage that knowledge and use it effectively.



Alex Dean, is a specialist in information architecture and business analysis with solution provider Professional Advantage.
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Overcoming the knowledge roadblocks

The humble fileshare has been one of the biggest barriers to knowledge management, according to Peter Laws, General Manager of Business Information Systems at Mind Australia. The organisation is tackling the issue with the implementation of Knowledgeone RecFind 6 an Electronic Document and Records Management System (EDRMS) to manage a range of corporate files including contracts, personnel files and email correspondence, and improve the organisation's access to stored information.

The not-for-profit organisation is reliant on government funding for its critical operations delivering community mental health support services from over 50 locations in Victoria, South Australia and now in Queensland. More than 800 staff at Mind Australia provide services to people living with mental health issues to help them to live independent, productive, and purposeful lives.

Mind supports people through a range of community and residential services including the families and carers of people with mental ill-health.

Mind also provides training for peer workers and other mental health professionals across the sector to increase their knowledge and skills in recovery oriented practices.

According to Peter Laws, Mind Australia's General Manager, Information Systems, "Our work is delivered through a myriad of contracts and agreements with multiple funding and service delivery partners. Keeping track of the details of each agreement, and sharing those with relevant staff is an ongoing challenge (as it is for many not for-profit organisations).

"The work is challenging, diverse and draws on decades of practice knowledge. There has been a lot of innovation in the field of recent times, with increasing empowerment and involvement of consumers in the development, implementation and evaluation of mental health support services. Ensuring the whole Mind community can access the knowledge learned along the way is important for quality and service excellence.

"Before we began implementation of RecFind 6 in late 2014 we relied on traditional fileshares, and encouraged staff to keep their documents in shared drives, however a lot of documentation ended up in personal drives. While the drives are archived when staff leave the organisation, all that knowledge is simply locked away.

"We needed to be able to customise the selected information management system to ensure it could provide the outcomes we required. Using the latest Electronic Document and Records Management technology, Knowledgeone Corp and Mind Australia are working together to make the quest to easily capture and find corporate knowledge a reality," said Laws.

"Having used RecFind 6 in a previous organisation, I was aware that through the RecFind 6 training programs, customisation of the software is something the organisation can do easily, without the need to outsource or engage the vendor to make a change" he said.

Since the start of the RecFind 6 implementation in October 2014, Mind has introduced the following functionality into the organisation;

- Automated capture and classification of emails for employee, property and all project related emails. Through a simple code and file number any correspondence between the HR team and employees is automatically captured in the system. The same applies for all property and project related emails.
- Digitisation of all property records, including; titles, lease information, emergency services and audit records. Through the use of RecFind, Mind Australia is capturing all documents



and correspondence related to projects in the ICT and Property areas. This enables quick and efficient sharing and discovery of required information.

- Digitisation of HR and personnel records. Employee files are created automatically from the HR system and any documents such as employee contracts are captured automatically from the organization's directory structure.

- Consolidation of documentation for, and management of contracts. Utilising the PDF OCR capabilities, all copies of contracts including variations are being scanned into the system to allow easy searching based on the entire contents of the document.

Another feature recently added is the automated capture and classification of documents on the directory structure using Rec-Capture. This has allowed certain directories on the file system to be automatically captured to RecFind.

Since implementing the RecFind 6 solution, Mind Australia has found some obvious benefits – particularly around capture of information and the ease of searching and retrieving the organisation's knowledge.

The first and major benefit is the ability to easily find documents associated with complex Government contracts and reporting requirements. The Security permissions in RecFind make it easy to manage quite complex access rights across the organisation.

"We have made it very simple to introduce automated capture of emails and attachments to RecFind, it just requires staff to include the file number in the subject line of the email," said Laws.

"The response has been amazing and we have now captured over 60GB of data since we commenced in October 2014.

Enterprise applications include TechnologyOne financials, Chris 21 Human Resource and Payroll software, QlikView BI Dashboard and an industry-specific client management system. The desktop environment is Microsoft.

The HR team's workload has been significantly eased by the introduction of automated classification and filing. Simple tasks such as filing a simple sick leave form that used to demand printing and scanning the form can now be accomplished by simply emailing it to the RecFind address.

By the end of the year, Mind Australia plans to have rolled out RecFind 6 for all Board, Executive and Government correspondence.

Perfecting Practice and Process

By Stephen Bounds

Computers and technology have irrevocably altered how work is done in the 21st century. But managers tend to underestimate the power of technology systems to affect both the culture and morale of their staff in positive and negative ways.

Knowledge Management, as a formalised discipline that aims to understand and improve organisational performance, is uniquely well placed to examine and understand this phenomenon

For example, most case management systems require staff to explicitly document choices and actions taken to improve accountability and recordkeeping. This document-centric, centralised approach to process/task documentation enforces a "corporate mode of thought" that can improve consistency in delivery to clients.

However, in many cases staff can feel that their individual expertise is not respected.

A decline in morale leads to a corresponding decline in individual responsibility, where staff follow the rules embedded in the system blindly, leading to situations where innovation is discour-

aged and the need for smart exception handling is ignored.

Technology always encourages people to over-describe their processes when designing systems. Yet often it is the "practices" people follow in between documented process steps, based on their individual assessment and judgement, that give a system the resilience it needs to cope with in all circumstances.

Sometimes this is simply due to individual experience and expertise that cannot be easily reduced to steps on a page. Sometimes it is because organisations can provide better quality services when they are specialised and contextualised to individual client needs."

Organisations need to be conscious of the distinction between practice and process and to optimise their human-technology interfaces to align with their desired culture and values. There is no one-size-fits-all approach here.

For example, where there is a high rotation/turnover of staff in roles the need for consistency will inevitably lead towards more highly structured processes.

There is also a tension between consistent service and quality of service. When you allow individual staff to operate without the constraints of corporate processes, they are able to act based on current, local information to deliver the best possible result for clients.

On the other hand, the quality of delivered service becomes far more reliant upon the individual personalities and competencies of your staff.

Does your organisation value empathy or efficiency more when dealing with its clients? (That's not a trick question – it's a very real trade-off.)



Stephen Bounds is Director and Principal Consultant at knowquestion, an information and knowledge management consultancy. <http://knowquestion.com.au>



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Building a Knowledge Culture

KM practices have developed over a period of years at Victoria's State Trustees, a Victorian government owned organisation that helps Victorians with wills, enduring powers of attorney, estate administration and private and charitable trusts. State Trustees also looks after the financial and legal affairs of nearly 10,000 Victorians who are unable to do so themselves due to disability, mental illness or other circumstance.

Stewart MacLeod, Manager, Knowledge and Development at State Trustees, believes KM must work hand in hand with culture and competency strategies, to ensure that employees share and support one another. At State Trustees these practices are generally included as, for instance, 'lessons learned' in project work, rather than being called out as distinctly KM.

Over more than 75 years, the organisation has gone through the typical migration from physical files and archives to a digital case management platform. There are over 400 staff across three sites and the agency has deployed the Objective EDRMS.

The role of Knowledge Manager was created over three years ago, "as a recognition that there was a huge amount of institutional or organizational knowledge which needed to well be better managed, be better captured, be better shared, and that we needed to have a more specialised function to do that," said MacLeod.

"An organisation of our vintage needs to keep on updating and innovating the way that we do things, and no organisation can stay still.

"Also the nature of our scale and industry means that State Trustees needs to do certain things in a way that not many other organisations do. So just picking up someone from another organisation and slotting them right in does not work.

"With that in mind it is really important that we capture what it is that we do and why it is that we do it in that particular way. So that's really the setting for how knowledge management started to emerge in a more concrete way rather than being just one of those things that people do in the background which then gets pushed down the list of priorities.

MacLeod does not believe that KM is something you can buy off the shelf as a software packaged solution.

"All the tools in the world aren't going to assist unless you start getting the culture right. You need to get people happy to share,



"All the tools in the world aren't going to assist unless you start getting the culture right " - Stewart MacLeod, Manager, Knowledge and Development at State Trustees.

you need to get people in the mindset that they want to change first. Software may assist that but for me it's fundamental to get the cultural piece done first," he said.

"Often what happens with organisations that when you try to transform an organisation or try to change a process, people try to hang onto the old ways of doing things or they don't want to share knowledge. A "burning platform" change model is about saying we must change or else, we cannot continue on the way that we've continued on, we must share in new ways, we must learn in new ways, we must learn from each other in new ways.

"For me part of KM is focussing on essential versus non-essential knowledge or important versus nice to have. Let's actually work out what is the knowledge that we need to capture so that we can meet best practice standards rather than what's the knowledge that might be shared more often but isn't actually particularly helpful to achieve that end.

"Culture is absolutely tantamount. Any kind of sharing tool is not going to work unless you get the environment right.

Stewart MacLeod is presenting a session at Knowledge Management Australia 2015 being held from August 4-6, 2015 at Rydges Melbourne. kmaustralia.com

Knowledge Management software that lives in the cloud

A new cloud-based knowledge management software product called KXDocs has been launched as a joint venture between two companies, Ventures Nirvana of UK and Calance Corporation, US.

The companies claim that KXDocs turns a business' library of documents into powerful knowledge capital.

Some of its key offerings include:

- Fast and smart search: KXDocs allows users to quickly search and find the right document from the organisation's library of stored documents.
- Document Description: For every document, KXDocs presents a detailed information page, which allows users to preview and assess documents in multiple ways.
- Configurable Metadata: KXDocs allows users to define custom metadata templates which makes its features specific to each business.

- Continuous Self-Learning: KXDocs continuously updates document information and search criteria based on actual search and download behaviour, comments and inputs from users, in addition to information provided by document authors.

KXDocs works as an add-on application to existing cloud-based document management and storage services, currently with Box and Dropbox and, in the near future, with Google Drive and Microsoft OneDrive.

Shalabh Kumar of Ventures Nirvana said, 'KXDocs is for all businesses which seek competitive advantage from their knowledge capital. If a business has a large library of electronic documents, KXDocs can help its employees make the most of this knowledge capital.'

Kanchan Ray of Calance said, 'KXDocs is a feature-rich enhancement to cloud storage services. If a business uses any of Box, Dropbox, Google Drive or Microsoft OneDrive to store and share documents, they should consider KXDocs as an add-on application.'

<http://www.kxdocs.com/kx/>

Researches find social networks can strengthen knowledge-sharing

Contrary to the notion that social networks are time-wasters, they could improve project management and the spread of specialized knowledge in the healthcare sector and possibly other large organizations, according to new research from Missouri University of Science and Technology.

In their analysis of how information is shared on social networks, three Missouri S&T researchers explain how the creation of a specialized network could improve the way information is shared via web-based knowledge management systems (KMS). Many large organizations use knowledge management systems to capture, retain and communicate project results and staff knowledge. Such systems can also prevent knowledge drain and provide training as “lessons learned” following specific occurrences and the resolution of particular problems the staff face, the Missouri S&T researchers say.

In their paper titled *“Improving Knowledge Sharing in Healthcare Through Social Network Analysis”*, published recently in the International Journal of Collaborative Enterprise, Drs. Elizabeth Cudney, Steven Corns and Suzanna Long of Missouri S&T’s engineering management and systems engineering department examine a process for creating a social network to improve information- and knowledge-sharing for a large health-care organization.

They discuss the development of a KMS using social network analysis to see how this combination of KMS and social network might improve methods for organizing and sharing knowledge within the organization. Through their research, they identified those in the organization who are perceived as early adopters of process improvement methods and mapped out a potential social network through which those early adopters could share their project information with others in the organization.

This allowed them to understand how changes to the work environment and procedures were perceived. The results from this preliminary work then allowed the team to devise a Likert-style questionnaire, a common survey instrument named for American administrator and organizational psychologist Rensis Likert who worked at the U.S. Department of Agriculture in the 1940s. This questionnaire was then given to all users to help the team assimilate a broad perspective on how social networking affects knowledge sharing.

Cudney, Corns and Long performed social networking mapping and analysis to characterize the relationships between the various “key players” – essentially the most influential and knowledgeable individuals in the organization – and the knowledge links between them. They found that improvements to knowledge-sharing could be made if individuals identified by many members of staff were to form a tight, core network of their own. This would rapidly increase the ability to disseminate information on projects because this core of individuals would all have many people in their own networks.

They also found that improvements in KMS abound if the “early adopters” also form a core network as they could disseminate new ideas much more rapidly too. An additional conclusion from the work is that if technical assistance is provided early this better facilitates the creation of connections for sharing information and networking opportunities. The team adds that as with education, a higher level of engagement and stimulation makes the system that much easier for the personnel involved to benefit from the information in the system.

“While these recommendations apply specifically to this healthcare organization, these recommendations are applicable for improving knowledge sharing in any large organization regardless of industry,” Cudney says.

The Missouri S&T researchers are continuing their study. The next step, they say, is to create an actual internal social network for the healthcare organization they’re working with and to implement recommendations for sharing information through the social network.

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Cutting the cost of digitising the news

A new cost-effective alternative for large-scale newspaper digitisation is being launched by DL Consulting, the company behind the Veridian collection management software and related newspaper digitisation services as well as an online search portal for the world's historical newspaper archives at www.elephind.com.

Since 2002 it has been assisting organisations around the world digitise millions of pages of historic newspapers and deliver the content as a digital collection. Based in Hamilton, New Zealand, with an office in Honolulu, Hawaii, DL Consulting hosts digital newspaper archives for a diverse array of global cultural institutions including the National Library of New Zealand, Singapore National Library and a number of US States and universities among many others.

Managing Director Stefan Boddie said that current digitisation projects underway across the globe have only scratched the surface, and there are still hundreds of millions of newspaper pages on microfilm still waiting to be digitised.

He believes a new cost-effective, standards compliant digitisation platform it has developed based on ABBYY's Recognition Server will be the key to providing broader online access to these untapped archives.

International demand

"While we are based in New Zealand most of the customers undertaking digitisation projects for major libraries and cultural institutions are based in the US," said Boddie.

There are many major international projects to digitise newspapers. Many libraries and government organisations seek to digitise the content to provide free access, and there are many other commercial projects seeking to digitise archival newspaper content and charge for access.

The National Digital Newspaper Program underway in the US for the past 10 years has spawned a range of XML markup standards for the formatting and presentation of digitised newspapers on the Web.

METS and ALTO are the names of these XML standards which are maintained by the US Library of Congress.

The METS standard is a flexible schema for describing a complex digital object (like a digitised newspaper issue). METS describes the structure of the object but does not encode the actual textual content of the object.

The ALTO standard fills this void by encoding the textual content of a digitized page in great detail, including styles and layouts. As well as encoding the digitised text itself ALTO encodes the spatial coordinates of every column, line, and word as it appears on the page.

The combination of METS and ALTO (often written METS/ALTO) is the current industry standard for newspaper digitisation used by hundreds of modern, large-scale newspaper digitisation projects, for example:

- Chronicling America from the Library of Congress.
- The British Newspaper Archive from the British Library.
- Trove from the National Library of Australia.
- Papers Past from the National Library of New Zealand.



Digitising aging newspaper archives can be a challenging task - Stefan Boddie, Managing Director, Veridian Software.

- NewspaperSG from the National Library of Singapore.
- Papers of Princeton from Princeton University Library.
- Columbia Spectator Archive from Columbia University Libraries.

"Traditionally we have been reliant on a small number of vendors who can produce data that complies with these METS/ALTO XML formats," said Boddie

"Over the past few years at DL Consulting we have been working to develop a pipeline that enables us to do it in a cost-effective fashion which we have now achieved using ABBYY's Recognition Server."

Out of the box the ABBYY Recognition Server software includes ALTO support which Veridian has built on to enable the creation of METS compliant XML data. The pipeline also generates images that must comply with a standardised JPEG2000 profile.

"Traditionally the alternatives are quite expensive and it's really only the high profile projects that have been able to afford these solutions," said Boddie

"Faced with costs upwards of \$1 per page, many projects have chosen to simply scan and OCR the newspaper microfiche to create a searchable PDF which can be done for a fraction of the cost but is not optimised for Web access.

"Our new solution will allow these projects to consider an ALTO and METS compliant alternative, which will only cost a few cents per page."

Cloud platform

The Veridian solution utilising ABBYY Recognition Server has been built entirely in the Amazon cloud and is able to completely automate the process and remove manual operators from the workflow. Most competing alternatives employ operators in low wage countries to assist with validation, which is still required in projects that require individual articles on the newspaper page and advertisements to be segmented.

Over the past few years Veridian researched a range of alternative methods to introduce a cost-effective pipeline. It toyed with converting basic PDFs and using ColdFusion to manipulate data into the right format.

"There were a series of different iterations trying different technology and eventually we settled on ABBYY around two years ago.

"The ALTO XML functionality attracted us and also the high profile of the ABBYY OCR engine which is underlying a lot of the platforms we have worked with.

"Recognition Server also offers some nice possibilities for process automation compared to other off-the-shelf OCR packages."

Digitising aging newspaper archives can be a challenging task if the microfiche itself is decaying and the original digitisation process was not done at high quality.

"It's always going to be difficult for OCR technology to deal with poor quality aging microfilm, however there are still millions upon millions of newer newspapers that can take advantage of the platform we have developed and employ a completely automated process.

"It is also quite applicable for older newspapers that have been scanned from the originals or have been microfilmed quite recently," said Boddie.

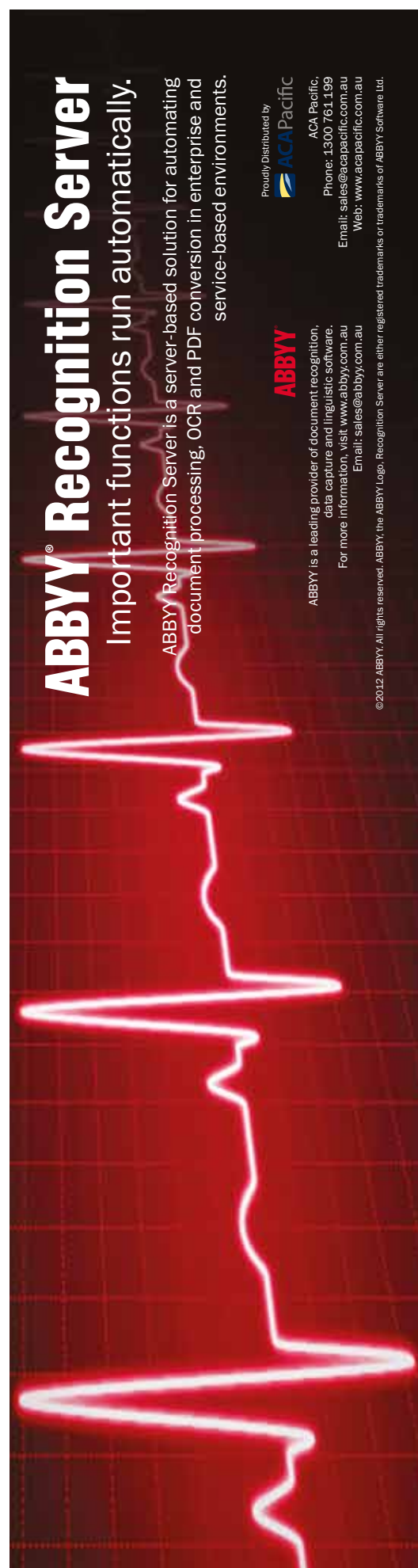
"ABBYY Australia are proud to be working with companies like DL Consulting in helping the world digitise and provide the best levels of accessibility to valuable archival content," said Henry Patishman, Sales Director ABBYY Australia.

"ABBYY Recognition Server is extensively used by Government departments, Large Enterprise, BPOs and SMEs in not only Australia and New Zealand but all around the world.

"ABBYY Recognition Server, the product used by DL Consulting for their solution, is a powerful server-based OCR software for automated document capture and PDF conversion.

"Designed for mid- to high-volume batch processing, it enables organisations and scanning service providers to establish cost-efficient processes for converting paper, as well as TIFF, JPEG, and PDF image documents into electronic files suitable for full-text search and long-term digital archiving."

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Tourism WA tackles information challenge

In-house or outsourced, cloud or on-premise? Tourism WA, the State Government agency responsible for promoting Western Australia (WA) as a holiday and business event destination, went through the typical scenarios when questioning how to future-proof its information and records management systems. It has now completed an upgrade to HP's latest version Records Manager 8 with the assistance of Information Proficiency, which has been providing a Records Management team since 2011.

Around five years ago tourism was targeted as a growth area for the state and major effort placed into marketing and infrastructure for events. The importance of the tourism industry in Western Australia is illustrated by current data that shows it employs more than 57,000 people (4.3% of the State's workforce). In 2013 overnight visitors spent \$A6.1 billion in Western Australia.

As a long term TRIM user, Tourism WA went to market to ask for recommendations on a path to take it forward into the digital future. The organisation has over 120 users operating in the Microsoft Office and Windows environment.

Management usually has a number of reasons to consider outsourcing: it enables remaining staff to focus more on their core functions; it may reduce ongoing operating costs; there may be service quality and stability improvements; and management control is usually less onerous.

Dean Lockwood, Chief Information Officer at Tourism WA, specifically prefers the outsourced model. Information proficiency now provides the agency's full RM team that includes a Records Manager, Records Co-ordinator and Archivist.

"At the time we went to market for a service as this model has worked well for us across a range of areas including technical development for our web sites and facilities management.

"We had a functioning framework, with the systems and processes in place, but there was an opportunity to leverage those systems to be more efficient in the way we manage information."

Information Proficiency provides Tourism WA with TRIM Administration as well as the development of a Recordkeeping Plan which needs to be updated every 5 years.

Other duties include development and review of policy and procedures, FOI investigation & response, records sentencing, TRIM training, File Creation, and physical file audits.

It is also providing scanning services and daily mail processing, recently introducing Kofax Capture for scanning incoming mail and a back scanning project using an in house Kodak Scanner i3200. Tourism WA has also implemented the Sigma Data products that integrate with TRIM, Logs inTRIM and Imports inTRIM. These products facilitate the ability to search and review the system generated audit logs of TRIM and the ability to bulk upload documents from shared drives into TRIM.

TRIM is integrated with Office to allow items to be dragged and dropped from Outlook or automatically captured. All staff email is archived via GFI Archiver, with links captured within Records Manager.

One project currently underway is seeking to embed the records management function more closely into business processes.

"At present it's generally handled after the fact. For instance project teams generate a lot of email and documentation, and when it comes to the end of a project we would record that into TRIM. Clearly that's not as efficient as it should be so we are working on having that integrated, so as the documents and records are created they are automatically captured and recorded," said Lockwood.

"We have made great strides in this of late."

One of the drivers of the RM8 upgrade was a need to also refresh the desktop environment to the latest version of Windows and Office.

"Information Proficiency & Sigma Data identified that RM8 could solve some integration issues we were facing," said Lockwood.

"There are some functional enhancements to the system that were really attractive to us. For example, the streamlined user interface, better and more reliable integration with other systems (MS Office) and improved back office administration functions."

Others contemplating a similar upgrade should not face it with too much trepidation, as long as the preparation is done right, observes Lockwood.

"We setup a test environment and used a non-sensitive subset of our production data, and allowed some of our key users to join the test. Once that was completed Information Proficiency assisted with the production upgrade which was done in an afternoon. I think HP have got that right, it works very well.

"Then the IT team rolled out the new client to all of the machines and our Records Management team went around the next day and made sure everyone was up and running and knew what was required, supported by some email and intranet communications that went out.

"We were going from the latest version so there were not any wholesale changes for users, it was really just getting comfortable with the new interface and the new system.

"We don't have any issues with our staff working with TRIM, and I think that's because we allow people to work with the existing systems that they are comfortable with and undertake records management through them. Users only need to go into TRIM directly when they need to find something.

"We don't just see information and records management as a back office function. We try and engage with staff and drive a culture whereby they know how to use the system more efficiently and how it benefits them.

"There's always more to be done but that engagement is crucial," said Lockwood.

Scanning with versatility at QLD Council

Whitsunday Regional Council has implemented an EzeScan scanning solution to manage incoming and outgoing mail digitisation into a TechnologyOne ECM platform. The council spent a considerable amount of time benchmarking three scanning products before making its selection.

As well as handling incoming physical and electronic mail, the Queensland local government authority wanted a solution that was versatile enough to handle registering outgoing mail such as dog licences, food licenses and accommodation licences as well.

Once the required template is selected in EzeScan the program automatically populates fields with data extracted from the council's TechnologyOne ECM platform and EzeScan specifically designed spreadsheets. EzeScan then automatically applies the required indexing profile set before registering the document in ECM with minimal operator intervention.

"EzeScan has been amazingly helpful in getting the workflow setup and making it do what we need," said Director of Corporate Services Graham Jarvis.

"The variety of incoming correspondence and their variable quality means it is difficult to accurately OCR so we don't rely on this function as a key part of the program operation but we do use it.

"Our main alternative is that EzeScan gives our operators an option to highlight selected typed text and automatically adds this text to the abstract of the document to work with on screen. This saves time and improves accuracy when registering.

"Our outgoing documents are much more standardised so the scanning workflow is much more successful. Also by drawing down properties of the document from our systems as well as OCRing customer or licence numbers it is able to more accurately populate ECM metadata fields which again saves time when registering.

"Very little needs to be typed anymore which is a great help".

"There are many council processes that have greatly benefited from the EzeScan workflow, including registration of property transfers or title name change," said Jarvis.

"There is a steady stream of these and each one can include up to 40 documents that need to be registered. Prior to EzeScan this process could take up to an hour but now it's down to around 15 minutes with minimal data entry."

Another bonus has come in the automated redaction of credit card numbers from documents that arrive via email or in hard-copy.



"EzeScan is able to redact credit card details whether they are in the email body or an attachment. This has been a real problem for us in the past as we needed to do this process without affecting the email message metadata, which we are now able to do."

The volume of incoming and outgoing correspondence is not enough to keep the council's new Canon DR6050C scanner working fulltime, meaning it is available for a range of back scanning projects.

Registration of cemetery records going back to the early days of the Whitsunday Region, located half way between Brisbane and Cairns, is one early project.

Established in 2008, the Whitsunday Region was preceded by two previous local government areas with a history extending back to the establishment of regional local government in Queensland in 1879.

"The number of pages in each record is variable. So EzeScan allows us to place a black page, either physically or electronically depending on the project, between the records to separate the documents," said Jarvis. Another project is the registering of old development applications.

"In this case we populate the required fields such as property & application number and EzeScan builds the document's Abstract/Subject line based on this information" said Jarvis.

"By working with the amazingly helpful team at Outback Imaging we have been able to set up our Ezescan product to have it do what we need it to do.

"It's a live program so I am often altering and updating it to suit our purposes. Often I will call their support team and say "I would like to be able to do ..." and together we make it happen. In the 10 months we have had the product there have not been many occasions that I have been told something is not possible. Our team is thrilled with this product, it is increasing our productivity, accuracy and versatility - what more could we ask for," said Jarvis.

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Workflow the key to Digital Maturity

Situated between Brisbane and the Sunshine Coast, Queensland's Moreton Bay Region is one of the fastest growing urban areas in Australia. Moreton Bay Regional Council (MBRC), Australia's third largest council, has implemented an Objective ECM System for more than 1200 active users to support the delivery of more efficient and effective ways of working inside the council, and new digital services to the public.

As a government entity, the Council's primary objective is to swiftly and cost-effectively provide necessary services to its constituents, which requires improved interaction and knowledge sharing.

In addition, the Council is focused on eliminating waste by reducing its dependence on paper-based data and manual tasks, streamlining document handling processes and increasing the opportunity for collaboration.

Keith Pattinson, Manager – Financial and Project Services for Moreton Bay Regional Council, said the end goal had always been to ensure that records management and compliance was not just something to be handled by the records management team.

"It needed to be dealt with by everyone in the organisation."

To mitigate the risk of business users deleting documents without due consideration to the requirements of the Public Records Act 2002, a workflow moves the "deleted" document to a hidden folder where it can be reviewed by a qualified records manager.

"We also wanted to digitise all our business processes and significantly reduce reliance on paper. To achieve that we had to do a lot of things," said Pattinson.

An evolutionary tale

A task like that does not happen overnight, and Moreton Bay's journey has been ongoing since the initial adoption and rollout of Objective in 2010. Some big steps have been accomplished so far, including the digitising of incoming correspondence and invoices with EzeScan, shutdown of network drives and implementation of a large number of fully digital workflows.

On the scale of organisational ECM maturity, Pattinson describes the Council as probably in its teenage years, with not long to go to achieve full adulthood.

"Now people are really starting to open their eyes into where Workflow's going to take them. Because basically the electronic foundation has been laid."

Objective ECM is now a mission-critical system at Moreton Bay Regional Council. It is the source for every document accessed through the Council's core business applications (TechnologyOne) and Property and Land Information system (Infor

Pathway). Workflow automation has been implemented across more than 100 business processes including processing of Development Applications (DAs), Asset Management and Human Resources.

Objective is also employed for document collaboration by internal teams. Interaction with outside organisations currently typically occurs by email but the Council is exploring use of the Objective Connect platform to enable secure sharing of documents held in the EDRMS with outside parties.

MBRC believes the investment in technology and workflow automation is very definitely worthwhile.

Angie Garnett, Coordinator Records and Knowledge Management, believes implementing a workflow demands careful consideration.

"We don't want to automate a really bad process –that's a big mistake, all you end up with is another really bad process that's electronic instead of manual."

MRBC uses business analysts to conduct proper business reviews to identify processes and justify workflow automation.

Done well however, workflow automation is a "very powerful tool," says Garnett.

"We do insist that any of these major processes have a cost benefit as a result of automation.

"We now get feedback from our business users, that they are finding ways to streamline their current electronic processes further. People are actively seeking our assistance to automate more processes.

"People's eyes have been opened to the opportunities, the potential that our digital environment offers. Operating more efficiently is now front of mind for the vast majority of our staff," says Garnett.

Significant savings

The Council estimates annual savings of over \$300,000 already derived from EDRMS integration and Asset Management workflows.

The future will see even further adaptation and innovation, particularly enabling mobile staff.

Developing workflows able to be actioned directly from email is high on Council's priority list.

"The more we become mobile, the more people don't live in the office, so the more their office becomes a tablet or a PC," said Pattinson.

"We have begun the process of automating workflows for our mobile workforce and mobility in Asset Management systems is very important with us right now."

(Continued opposite)

Tweed Shire Council transitions to eLetters

By David Schulz

Sending digitally signed eLetters is allowing Tweed Shire Council to meet customer and community expectations, reducing paper and printing costs and administrative effort while delivering a stronger governance outcome.

"Our community and customers expect timely responses from Council and being able to respond in an electronic form is extremely valuable in meeting these expectations," said General Manager Troy Green.

In fact, it was becoming increasingly frequent that support staff were asked to scan a letter once the hard copy was signed and send it attached to an email.

Frustrated with the additional work this practice created, the Personal Assistants' (PAs) Group within Council initiated a project to develop an electronic outgoing correspondence procedure. A key concern right from the beginning was a way to securely sign an eLetter. After much discussion about how access to scanned images of Directors' and Managers' signatures might be controlled, it became apparent that images of signatures were simply not appropriate.

The procedure adopted by the Executive Management Team mandates the use of a PKI digital signature for electronic outgoing correspondence. The digital signature provides recipients of eLetters with high confidence in the authenticity of electronic correspondence they receive from Council. Both Council and the recipient can also be confident that the document is reliable, as the digital signature verification checks that nothing has changed in the letter after it was signed.

Outgoing correspondence is drafted and reviewed as usual in MS Word using a template that includes the logo and other branding from the pre-printed letterhead used for hard copy mail. A simple print process converts to PDF and a highly secure digital signature, unique to the document is applied.

The signing process is a single click process using the Omni-Sign software supplied with Council's CoSign digital signature capability. The concerns identified by the PAs group about controlling access to electronic signatures is addressed by the centralised approach of the CoSign appliance. Each person's graphical signature and their unique signing credentials are stored securely in the CoSign appliance.

The signed letter is sent as an attachment to an email. The sent email along with the attached digitally signed letter is captured to the ECM system. This means the corporate record contains not only the outgoing letter, but also whom it was sent to and the date and time it was sent.

Electronic correspondence has a number of benefits for Council.



The first is that it meets the expectations of customers and the community for timeliness and the convenience of electronic communications. Reducing Council's consumption of paper and print consumables is important for both cost and environmental reasons. Electronic correspondence will make a significant impact in reducing both the paper and toner cartridges the organisation consumes.

"For me personally, the ability to sign electronically is a real convenience and a real time saver for the organisation as a whole," said Green.

In assessing the suitability of digital signing and the authenticity and reliability they offer over simple electronic signatures, it also became apparent that moving to electronic correspondence has a positive impact on governance and risk. With cheap, high quality scanners and printers so readily available, the evidentiary value of ink signatures on paper is much diminished. The direct capture of both the securely signed electronic letter along with the delivery details creates a much stronger information governance outcome for the organisation.

Council's Manager Corporate Governance, Neil Baldwin, was responsible for assessing both the opportunity and the risk in adopting an electronic outgoing correspondence procedure.

"Once we understood the security that digital signing offers us and the fact that we now know when the eLetter is delivered and to whom, electronic correspondence is a significant improvement over our traditional hard copy mail process," he said.

Following a successful trial, the electronic outgoing correspondence procedure was formally adopted for use across the organisation. Recognising the convenience, simplicity and savings of electronic correspondence, it is now the preferred method for outgoing correspondence from Council.

David Schulz is Market Manager Australia for Secured Signing for Documents, a division of TME Digital Signatures, the Australia/New Zealand reseller for CoSign digital signature solutions. Contact him at david@securedsigning.com

Workflow the key

(from opposite page)

Moreton Bay Regional Council field workers now use a mobile app on their tablets that links their tasks to the Council's asset management system, and Objective. For example, photos taken on site, of graffiti or potholes, are imported into Objective, but then accessed through the Asset Management system. If work needs to be done at a later date, regardless of the team working on the asset, the information and photos can be quickly accessed on their tablets, in the field. The ability to do this on site saved around 200 hours in data re-entry in the first three months of implementation. Around 5000 requests per quarter are now managed using this technology.

Ratepayers are also embracing new mobile apps for Customer Requests which can be used to quickly and easily advise the Council of graffiti, pavement damage or potholes from their smartphones, along with photos and GPS co-ordinates and a request for resolution.

The request is entered into the Land Information System, the photo is stored in Objective ECM and a request number is sent to the customer through the app.

"It is a self-service model that's providing a fast, easy to use service to the residents while also improving efficiency for Council," said Garnett.

"We've eliminated a number of manual processes that occur in more traditional customer service models."

Defence Electronic Health Records project cops some flak

A four year program to establish an Electronic Health Record for 80,000 Australian Defence Personnel has come in for some heavy criticism by the Australian National Audit Office. The contract was issued in 2010 to CSC to implement an off-the-shelf product sourced from the UK's Egton Medical Information Systems. The proposed system was originally called the Joint eHealth Data and Information System (JeHDI) and was later known as the Defence eHealth System (DeHS).

The system was intended to centralise, electronically capture and manage ADF health records and also inform health groups preparing for deployment in support of military operations.

Through incremental increases in scope the expected cost blew out over four years to \$A133 million, some \$A110 million higher than the original budget.

The report concludes that DeHS has actually increased administrative workloads in some areas. For example, pharmacists are required to record patient medication and prescriptions in both the FRED/PILS (primary dispensing and stock logistic systems for pharmacists) and DeHS; and external health care providers are required to submit clinical reports and referrals in paper-based format for scanning, before electronic files are appended to patient eHealth records.

Initial plans to migrate health record data from existing repositories and paper records into the new DeHS system have not materialised, and the implementation of the pharmaceutical dispensing module has been deferred until late 2015.

Poor data quality

While CSC prepared tools to migrate records from defence's existing systems, this did not proceed owing to the discovery that they contained "poor quality data."

Instead it was decided to prepare basic health summaries from patient Unit Medical Records and attach these to the personnel files in Defence's Objective records management system

"For recruits joining the ADF in 2016, DeHS may be the only system that will manage their entire patient record—from recruitment to discharge—while the medical history of current ADF members may need to be accessed from multiple sources, as required," the ANAO report notes.

"Clinical practitioners have reported that clinical care of patients is generally not compromised by the absence of a complete patient medical history in DeHS, and that on occasions they will revert to Unit Medical Records to inform a patient's treatment strategy. However, certain health groups have been inconvenienced by the absence of records, such as dentists recording details of patients' dental history following the rollout of DeHS."

DeHS is eventually expected to link with Australia's national Personally Controlled Electronic Health Record (PCEHR) for the interchange of health information across private and public health systems.

The ANAO found that "the principal reasons for the increase in DeHS project costs were: a one year extension of the funded sustainment period; hosting the system externally rather than internally; and the inclusion of previously unbudgeted items such as training requirements."

"Overall, Defence's planning, budgeting and risk management for the implementation of DeHS were deficient, resulting in substantial cost increases, schedule delay and criticism within government.



"During the initial phases of the project, Defence did not: scope and cost key components of the project; validate project cost estimates and assumptions; obtain government approval when required; follow a project management methodology; or adequately mitigate risk by adopting fit for purpose governance and co-ordination arrangements.

"Defence's planning and management of the initial phases of the DeHS project were well below the standards that might be reasonably expected by Defence's senior leadership, and exposed the department to reputational damage.

"While the business case identified business requirements and key risks, it was also somewhat ambitious. Defence planned to: aggregate patient health records from multiple Defence systems; standardise business processes across all health groups at the same time Defence was redesigning its health services support model, including its contractual arrangements; and deploy DeHS in operational environments. However, the business case lacked detail on how these requirements would be achieved."

The report concludes that between 2012 and 2014, Defence strengthened project governance and management arrangements to achieve the rollout of DeHS by December 2014, featuring most of the intended functionality,

"... notwithstanding the need for some corrective action, stakeholders have identified early benefits from the use of the system, including access to a single patient eHealth record," the ANAO report concludes.

Although some limitations remain, as Defence had "intended that the system would automatically capture civilian health care provider referrals and reporting; support dispensing of pharmaceuticals; and exchange information with Defence's financial management and accounting system. However, this work was not progressed, which has delayed the implementation of agreed DeHS functionality and the realisation of intended benefits."

The Department of Defence responded to the ANAO Report by noting, "Since the implementation of Defence eHealth System (DeHS), Defence has made significant improvements in the assurance of ICT projects. In particular, improvements in the governance of approval processes and the establishment of professionalization streams have reinforced the internal accountabilities."

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MMG drills deep into Document Management

How does a global organisation with more than 9000 employees deal with document management, especially as it's not regarded as a particularly cool topic. When staff at Head Office alone are generating more than a million documents a year, the challenge is formidable, and the idea of a solution becomes more attractive. For growing mining company MMG the response was to integrate OpenText Content Server and SharePoint with the aim of achieving an integrated search, collaboration and information lifecycle management solution.

Operating across the globe with active or scheduled mining operations in Africa, Asia, Australia and the Americas, MMG is headquartered in Melbourne and listed on the Stock Exchange of Hong Kong Limited. MMG's major shareholder is China Minmetals Non-ferrous Metals Co. Ltd., a subsidiary of China Minmetals Corporation, one of China's major multinational state owned enterprises.

David Bough, MMG Group Manager IT Strategy, said there were a number of critical issues driving the implementation of a collaboration and information management solution for more than 3000 knowledge workers.

"A huge amount of time is spent in re-creating, finding and dealing with out-of-date information often stored as multiple copies.

"Staff requirements to collaborate with staff in other areas, remote staff and external parties is increasing.

"There are also risks associated with over-retention of information."

These include the risks of vital documents being lost, duplication of information and work, problems in compliance with industry standards, no integrated document repository and poor information discovery.

In an industrial context, the risk becomes more meaningful, as safety can be seriously impacted by someone failing to access the latest version of machine operating instructions.

Beginning in 2012, MMG moved to address these issues by developing an Information Management strategy and roadmap that included a redeveloped new architecture based on integra-

tion of OpenText Content Server 10 and SharePoint 2010.

Adding to the challenge was a simultaneous rollout of SAP for all core business processes.

Content Server was deployed in Stage 1 as a repository for the MMG library of controlled documents, those identified as high risk with high or long term value. Some examples of document types include contracts and engineering drawings

These all require significant controls and are strictly managed by applying a Retention and Disposal schedule. The MMG Library is predominantly utilised by staff at Mine Sites and some specific areas of head office

Implemented in tandem, SharePoint 2010 was deployed to provide an Intranet and a collaboration platform known as MMG Workspaces, where low risk short term value documents are stored. This is primarily a Head Office tool that applies a common retention and disposal schedule. SharePoint also provides the platform for MMG's intranet and Enterprise Search, acting as a portal to all MMG Web-Based Systems.

Meanwhile a set of rules was developed for retention and disposal for documents stored in the MMG Library.

The team is currently working on defining rules that relate to retention and disposal of documents in workspaces as well as email in exchange. This includes rules around the Email Journals.

The current thinking is to retain content for a short-medium term and provide users the ability to file into the MMG Library if the document/email is of long term business value. Automated rules will move some document types to the MMG Library automatically.

These rules are set to be deployed in the next 12-18 months and over time relevant content from network file shares will be migrated to MMG Workspaces. There is a range of tools available to assist with this task, which MMG is beginning to evaluate with plans for a pilot data migration project in 2015 to test suitability.

Another important component of the architecture at MMG is the integration between the MMG Library and SAP. Staff can generate Maintenance Work Orders from SAP and have the associated work instruction documents included from the MMG Library.

One of the benefits of rearchitecting an enterprise information management platform is the ability to do away with multiple

overlapping systems. In MMGs case it was able to reduce the number of intranet platforms from four to one and halve the number of document control systems.

MMG is also hoping the introduction of an authorised and managed collaboration tool will bring back users who have defaulted to Dropbox and any number of other cloud-based platforms.

A team of ECM consultants assembled to assist with the rollout included the firms CGI and Astral. A lot of time was spent considering various archiving models, with the conclusion to archive Project sites from SharePoint to Content Server on completion.

"This was less of a technology project than a business change project. A significant proportion of the budget was devoted to training and changing the way people work. A multilingual workforce added to this challenge," said Georgia Cronin, MMG IM Architect.

Enterprise Search

Once a migration from SharePoint 2010 to 2013 is completed in 2015, MMG expects to deploy the integrated FAST enterprise search platform and. This utilises an Open Text solution to enable Content Server documents to be indexed and their metadata available in SharePoint.

"We want one interface that will search across all our repositories, including the intranet, SharePoint Workspaces, the controlled document library, newsfeeds and archives. Eventually this will also include selected file shares that don't need read/write capability," said Cronin.

Some major lessons have already been learned as the process of planning an enterprise search rollout has been underway:

- Mapping relevant Content Server attributes to SharePoint Managed Properties is very important if you want to use combined metadata refiners
- Adjusting the ranking mechanism for Crawled Properties within a Managed Property is also very important – particularly for Titles where the SharePoint approach is very different to the approach Content Server uses
- De-duplication of results is important to watch
- Email is a challenge due to the fact that Content Server doesn't keep email properties as actual attributes and therefore these are not exposed to SharePoint, instead you are having to use FAST metadata extraction
- Displaying relevant sets of documents on intranet pages requires custom display templates
- Search apps are worth doing – basic web forms that allow users to select sets of metadata and from these form a URL string.



Georgia Cronin, MMG IM Architect and David Bough, MMG Group Manager IT Strategy.



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Hillary Clinton's email drama

There has been widespread dismay at revelations that former US Secretary of State Hillary Clinton used a personal email server for both private and official government communication during her term in office. A number of senior Australian and New Zealand senior government ministers have confirmed that they don't follow the Clinton protocol in carrying out their own affairs, although it appears there are no specific restrictions that prevent the practice.

Clinton's actions are being analysed primarily through the lens of political allegiance, with many Democrats regarding it as a storm in a teacup while republicans consider it an apparent deliberate destruction of federal electronic communication records not under the control of any federal archivist and being sought in a Congressional investigation.

Lawyer and commentator Jon Neiditz "Writes that "Most troubling, however, is that decisions were apparently made simply to destroy all communications deemed "personal" in this system without any review by a trusted third party, on the purported basis of protecting the "privacy" of all such communications, even though those who made the decision to destroy all such records were undoubtedly well aware that the privacy of all such communications could easily have been preserved by such a privileged and confidential third-party review.

"Many of the hundreds of thousands of you who, like me, deal with legal burdens regarding the preservation of information relevant to a reasonably likely investigation or litigation and legal requirements to maintain "reasonable security" regarding sensitive personal information — let alone the information sent by government officials to the Secretary of State — may be thinking what I ... thought when I just read these words: This is Watergate, and then some."

Clinton's private e-mail address -- hdr22@clintonemail.com -- was reportedly established on a domain set up January 13, 2009, the same day a US Senate committee held her confirmation hearing. She was confirmed and sworn in on January 21 as President Barack Obama's first Secretary of State.

The fact that Clinton's emails were not a part of official State Department records until recently means many of them would not have been located in response to Freedom of Information Act requests, subpoenas or other document searches conducted over the past six years.

Following the New York Times story on March 2 that revealed Ms Clinton's email arrangements, Time Magazine contacted 13 members of the present Obama Cabinet to ask whether they followed her lead. All responded in the negative.

IDM made a similar request of Australian and New Zealand Ministers.

A Senior Media Adviser in the office of Australian Defence Minister Kevin Andrews confirmed "Minister Andrews uses a government email account to transact parliamentary and government business."

A spokesperson for Finance Minister Senator Mathias Cormann said, "The Minister does not use a private email account for official government business."

These responses were echoed by representatives of New Zealand's Minister of Energy and Resources and Minister of Transport, Simon Bridges and NZ Defence Minister Gerry Brownlee.

In Australia, the Department of the Prime Minister and Cabinet is responsible for Commonwealth whole-of-government coordination and leadership for cyber policy issues. Nothing about the Ministerial Standards of Oath of Office requires adherence to any particular computing standards.

IDM asked the Department whether it issued firm guidelines on the use of personal versus official government email accounts for official business.

It responded, "The Australian Government's Information Security Manual recommends agencies take a risk based approach to the use of email and the infrastructure supporting its provision. It further recommends that agencies implement a requirement for all official business to be conducted through agency infrastructure, in agency IT security policies."

The National Archives of Australia responded that "Federal government ministers' documents are subject to the Archives

Act if they are records of their work as a government minister. It isn't against the Archives Act to use personal email for Commonwealth business, as long as there is a mechanism for records to be retained in accordance with the relevant records authority.

"Unauthorised destruction of a Commonwealth record is a potential breach of the Archives Act."

The Clinton controversy centres around the US Presidential and Federal Records Act Amendments of 2014 (which became law in November 2014). This specifies restrictions on the use of "non-official electronic messaging accounts" and mandates that if one is used then a copy must be forwarded to an "official account" at the time of sending the message, or within 20 days.

Clinton was Secretary of State from 2009 to 2013, before the law was enacted.

Responding to criticism, Clinton said it was her practice to email government officials on their ".gov" accounts, so her work emails were immediately captured and preserved. She did not state how this transposed when emailing non-US government officials.

In recent months, Clinton has turned 55,000 pages of printouts of her emails to the State Department, claiming about 90% of these emails were already in the Department's record-keeping system because they were sent to or received by "state.gov" accounts.

She defended her decision to hand over printed copies, stating that is simply following the instructions regarding electronic mail in the US Foreign Affairs Manual which require that "until technology allowing archival capabilities for long-term electronic storage and retrieval of E-mail messages is available and installed, those messages warranting preservation as records (for periods longer than current E-mail systems routinely maintain them) must be printed out and filed with related records."

On March 5, US Secretary of State John Kerry pledged that the department would work "as rapidly as possible" to go through all the new documents, redact any sensitive information, and then release them to the public. The department has since said that the effort will take several months and it is estimated the task will cost millions.

(Continued over)

Hillary's convenient disruption of good governance

By Avron Welgemoed

Like a train wreck happening in slow motion right in front of us, Hillary has tried desperately to explain the rationale behind adopting convenience ahead of governance. It's far easier in today's information overloaded world to be lured into using the latest technology and Cloud-based applications, for the incredible convenience they provide. Convenience that lets you get to your information from anywhere, anytime, be able to mash it up and merge it to use for completely new purposes. Convenient, easy to use, easy to deploy and most of the time you know that the IT department will probably just not be helpful, take forever or more likely, will just say no.

Hillary's justification was a simple one, "I didn't want to carry around multiple devices, so I used one email account for convenience". That, despite being the Secretary of State for the most powerful nation in the world, was apparently justification enough.

So why is everyone getting het-up over this, she produced copies of 30,000 emails that were work related and deleted the other 31,000 private ones, didn't she? Yes, she did, but this is where the debate about transparency and governance subversion starts, and what she may have unknowingly got herself into. Her desire to find a more convenient way, has proved to be a major disruption of very significant governance fundamentals that very few businesses could justifiably get away with.

In return for that convenience, she may have inadvertently sacrificed crucial information controls, managed security and management scrutiny. How did she deal with classified information, control access or ensure complete records?

What about classified information? Although she denies it, in a position like hers, dealing with State Department staff and foreign officials, it is unlikely that there was not a fair amount of classified or privileged information being exchanged.

In our real business world, there is always a large proportion of information that contains commercially confidential advantage and cannot be shared outside of the business and often only shared in a limited capacity internally. Putting that information outside of a business's systems means that despite the new found convenience, those classifications are probably meaningless and

unenforceable. Who else has had access to this? Hillary may need to prove that nobody else was able to gain access to her sensitive email, either with or without her knowledge. She asserts that her private mail server remained secured, but email is vulnerable to attacks, through spoofing, being read in transit or the email server hacked.

Back in the real world, putting business files or email into systems outside your control also means you may not be able to control who actually gets access to that information. It could be somebody you previously shared files with, that you've since forgotten has access. It could equally be the staff of the Cloud services business you use, with their administrator rights that happen upon your useful information.

Is that everything, or is something missing? As Hillary separated her information from the State Department's oversight, she may have without knowing, placed the onus entirely on herself now to prove that she can produce a complete record of her interactions in her role. She says she has, but even with those 30,000 emails she has produced, questions will remain as to whether that is the complete set, what may be missing or whether there has been any deliberate tampering or deletion of anything incriminating.

If this was in our real business world, defending any business action with incomplete information records such as, timelines, order of events or approvals, would mean exposing the business to all kinds of risks. It becomes easy to make baseless assumptions, draw bizarre conclusions or just assume the worst... and people will. For a business having to defend any action through litigation, there is nothing worse than finding you only have a small portion of the records available. How do you apply a legal hold and discovery when you can't know where or what information may have been squirreled away, and have no control of any of those systems?

Hillary's saga is far from being complete, but all the way through it will illustrate many of the lessons we should all be learning from. Take a look at your business. Where do your staff store their documents, or forward their email? How can you be sure?

Avron Welgemoed is an executive with Iron Mountain Australia

Hillary Clinton's email drama

(continued)

Mike Pompeo, a Republican Senator and member of the House special committee on Benghazi that is subpoenaing Clinton's personal emails, told US media that based on his committee's experience sorting through 44,000 other hard-copy paper documents provided by the State Department last year, the new effort could involve "hundreds and hundreds of man hours."

"I think the effort of reviewing these documents will greatly exceed a million bucks," said Pompeo. "The United States taxpayer is going to pay for that."

The State Department must have employees review every page to ensure that no sensitive or classified information will be released. Those redacted documents must then be scanned and compiled into a database searchable by the public.

If Clinton had used her departmental email account — as she insisted her employees do during her tenure — the messages would already be in the government's electronic records management system and could be redacted and released as part of the regular Freedom of Information Act process, Pompeo said.

"Remember, this challenge was created when a government employee decided not to use the government system," he said. "This is another reason that the directive secretary Clinton gave to all State Department employees to use the official system actually did matter."

"It's not only the time of printing out the paper and reviewing it, it's the next step of redacting it," added Gary Bass, the founder of the non-profit group OMB Watch (now called the Center for

Effective Government. "It's a very lengthy process."

Alan Morrison, a public interest professor at the George Washington University Law School, told the *US National Law Journal*, "I don't know of any statute under which a person can be indicted or charged for not saving something on a federal computer. It doesn't mean [Clinton] wasn't supposed to ... but I don't know of any remedy available" to punish a former government official."

The US Federal Records Act requires agency heads to "preserve records containing adequate and proper documentation of the organisation, functions, policies, decisions, procedures and essential transactions of the agency."

But the law doesn't spell out any consequences for violations — nor is it apparent Clinton violated the letter (if not the spirit) of the law, the *Journal* reported.

"There's not any blanket prohibition on any federal employee from using a personal email account to conduct government business," said lawyer Neil Koslowe, a former Justice Department special litigation counsel who has worked on cases involving the US Federal Records Act.

If it turns out that Clinton destroyed documents or mishandled classified information that would be another story — such violations can be criminal. However, the US State Department has said there are "no indications" that Clinton improperly used her email for classified information.

One Canberra insider commented that, "The irony is that Snowden leaked documents suggesting that internal US Government networks are basically permanently hacked by other state operators; it's quite possible that Clinton's arrangements were more secure by virtue of their independence!"

State Dept. email catchall fails the test

Responding to criticism of her use of a personal email account for US Government business, former US Secretary of State Hillary Clinton claims that recordkeeping requirements would be met because she forwarded mail from her personal email account to US State Department staff where they would be permanently archived. However a new report from the US Office of the Inspector General has blasted Departmental email management practices and concludes that staff only keep a tiny fraction as records.

The review was undertaken between January 24 and March 15, 2014. It found that in 2013, US State Department employees created 41,749 record emails. With more than a billion emails sent, that's about .006 percent that were retained as records.

State Department officials agreed that many emails that qualify as records are not being saved as record emails. The report concludes that despite a 2009 upgrade in the Department of State's system that facilitated the preservation of emails as official records, "Department of State employees have not received adequate training or guidance on their responsibilities for using those systems to preserve 'record emails.'"

In 2009, the US Bureau of Information Resource Management (IRM) introduced the State Messaging and Archive Retrieval Toolset (SMART), which allowed for the preservation of emails as official records. SMART allows users to create official records in the form of cables and "record emails" through Microsoft Outlook. According to State Department policy, any email that includes information about the organisation, functions, policies, decisions, procedures or operations should be preserved as an "email record," but the report found that employees at the department overwhelmingly lack the guidance and training to properly preserve email records. According to Department guidelines,

"email messages should be saved as records if they document the formulation and execution of basic policies and actions or important meetings; if they facilitate action by agency officials and their successors in office; if they help Department officials answer congressional questions; or if they protect the financial, legal, and other rights of the government or persons the government's actions directly affect." It concludes that "employees do not create record emails because they do not want to make the email available in searches or fear that this availability would inhibit debate about pending decisions."

"In some cases, it was because the email contained individual opinions that contributed to internal debate on a pending issue. Many interviewees expressed a fear that if participants in such a debate knew that their opinions would be permanently recorded or accessible in searches, they would not express their opinions in an uninhibited manner. In some cases, an email containing a decision that ought to be preserved as a record was preceded by a chain of emails full of deliberative comments. In other instances, the situation discussed in the email was considered sensitive."

"Record email usage varies widely across bureaus and missions," said the OIG. "The Bureau of Administration needs to exercise central oversight of the use of the record email function."

"In some cases, it was because the email contained individual opinions that contributed to internal debate on a pending issue. Many interviewees expressed a fear that if participants in such a debate knew that their opinions would be permanently recorded or accessible in searches, they would not express their opinions in an uninhibited manner," said the report.

The full report is available at <http://oig.state.gov/system/files/ispr-i-15-15.pdf>

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Business Process Alignment

The difference between speed and velocity

By Richard Frykberg

Okay, so you've automated your business processes. Purchase Requisitions are online and being approved in SAP ERP. Customer discounts are being processed and approved in Salesforce.com. New Employee appointments are being managed and approved in SuccessFactors. Capital Expenditure (CAPEX) requests are being approved through a SharePoint-based document approval workflow. No more paper! Automated workflow notification emails and tasks are being generated at an amazing rate. Job Done!

Have you checked-in with your CFO lately? Has business agility and effectiveness really improved, or are you just doing the same old thing faster? Not uncommonly, in order to expedite process automation initiatives, processes are standardised, simplified and automated. A single-source of organisational structures is being referenced and everything follows a predictable and consistent pattern. You've achieved an elegant technical solution, taking advantage of the process automation capabilities of your various application platforms and should be adored by senior business executives and decision makers. But somehow, they remain underwhelmed, overwhelmed and hesitant in funding your next big process automation opportunity. Why?

The difference is in process speed vs process velocity. Speed is scalar quantity referring to how fast a process is capturing requests and churning out notification emails, decision tasks, and reminders. Speed is readily achieved through process automation. Velocity is a vector quantity that measures the rate at which a process delivers its business objectives. Velocity is achieved by enabling collaborative business processes that provide

executives with deep contextual insight for timely and effective decision making to support business outcomes. A high speed process can accelerate a traditional paper-based approach by instantly routing inputs and information between participants. In contrast, a high velocity process expedites this process to achieve a strategically aligned outcome in the shortest possible time. High speed processes are achieved by eliminating paper. High velocity processes require a focus on expedited decision making.

For example, a Capital Expenditure request for a new IT project may be automated and involve tasks for line of business approval, vendor quotation provision, business case attachment, budget comparison, and executive sponsorship approval for strategic alignment.

A classic high speed process might look something like this: Requests are submitted, and internal contributors provide feedback. The request is exposed to potential partners and preliminary costing is obtained. The request is submitted electronically for approvals, but the initial management approvals require more supporting information which the requestor retrieves and mails back. The approval task is rerouted back to the management approver who then needs to consult existing information systems to retrieve budgetary capacity, for example. Following management approval the request is routed for executive approval, and again the requestor may be required to provide feedback on the process and approvals to date prior to the executive consulting the strategy plans to make a final decision.

Alternatively, in a high velocity process, information is appended progressively as the process proceeds through the management approval layers with a focus on the ultimate executive decision. Business input is gained collaboratively in parallel accumulating

all specific request justification information. The request reflects the approval log with detailed commentary, all supporting documentation, supplementary budget and strategic references to ensure that an efficient and effective executive decision can be taken on a timely basis.

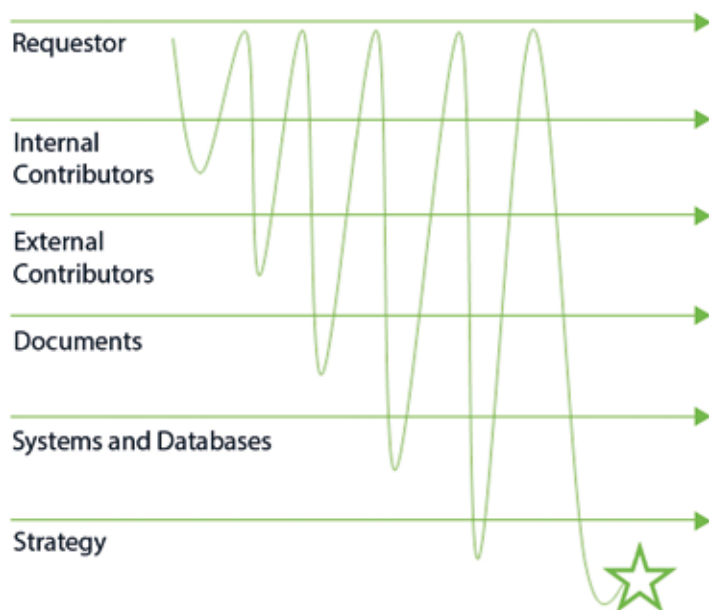


Figure 1- High-speed iterative process to achieve outcome

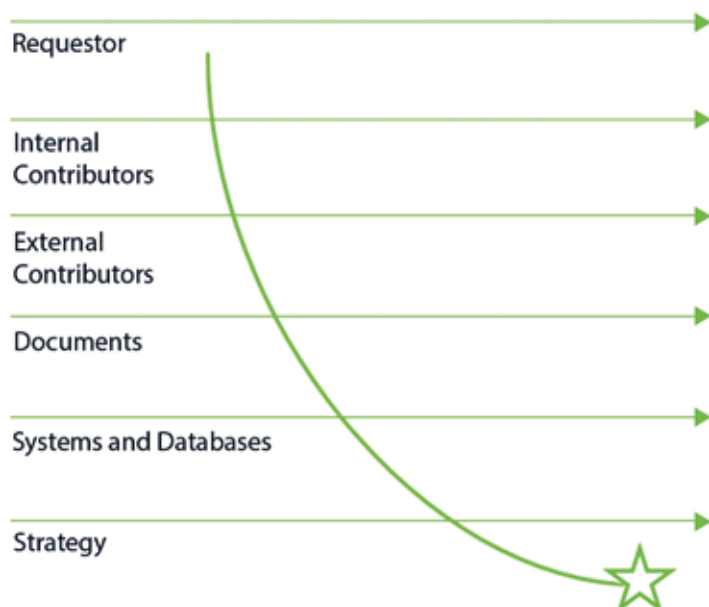


Figure 2- High-velocity strategy-aligned process optimisation

High speed is achieved by process automation. High velocity is achieved by process alignment: ensuring collaborative process progression, retaining process feedback, accumulating supporting documentation, combining request specific and supplementary information all for the benefit of the final executive decision. Why do we need 'business processes'? Why not just 'do things'?

The core purpose of business processes is to optimise activities in an environment of constraints (resource, time and regulatory). Information is gathered and validated and then evaluated to select the most strategically aligned course from an array of opportunities. Sometimes, however, in the pursuit of process efficiencies, this strategic goal is subordinated to the immediate return provided by process automation.

Business process alignment, by contrast, is focussed on the outcome of the process. Business process alignment is achieved by ensuring organisational strategies and plans are referenced in the context of the business process. For example, through business process automation, a Purchase Requisition may be electronically routed for executive approval to speed up the approval process. Without further planning context, the responsible executive would be shooting blind in attempting to evaluate these requests, or resort to supplementary enquiries to make effective decisions. That is why an aligned business process would ensure that all the input and commentary of the various stakeholders to the purchase request is recorded, supplier quotations are accessible for comparison, the operating budget capacity for the responsible cost centre is visible and the request is mapped to priority strategies and initiatives.

Business process automation is synonymous with workflow management – automation of industrial style sequential task allocation and high-speed execution. Business process alignment is more aligned with collaboration. Aligned processes are more flexible in construction, more open for ad-hoc participation on a subscription (as opposed to allocation) basis. Aligned processes value commentary as much as data, documents as much as records, and achieve high velocity with regard to process outcomes by removing approval bottlenecks, by providing decision-makers with all the required inputs for effective decision making.

Where business process automation technology is focussed on information collection and transmission, process alignment solutions are focussed on the executive experience. For the majority of executives, email is a curse, and should be reduced, not amplified. Task lists provide executives with clearer visibility of the key decisions awaiting their input and should be preferred over email communications.

Most executives travel, and mobile accessibility of their tasks is crucial to aligned process design. Executives require consistent and intuitive tools as their time is valuable, and their availability for training and support is limited. Executives should be able to action decisions effectively with a full array of outcomes including not just 'approve' and 'reject' but 'request more information', 'delegate', and 'defer', for example. And essentially, whilst decisions should be able to be taken and recorded anywhere, aligned process solution should ensure that the action decision is transmitted immediately or as soon as technically possible.

In conclusion, the objective of all business processes is to support effective, strategically aligned, executive decisions. Automation improves process speed, but too often just accelerates inefficient circular discussions. Aligned processes improve business velocity by ensuring that important organisational objectives are achieved sooner.

This outcome is achieved by an unwavering focus on the executive user. It's about ensuring that executives have a decision support tool that is universally accessible, easy to use, information rich, as flexible as real business and enables real-time action. Whilst automation of back-end processes is a good start, truly engage and delight your senior executives by eliminating email clutter and consolidating required decision tasks in a way that is intuitive for executives and supports effective, strategically aligned, better business decisions.

Richard Frykberg is CEO of IQX Business Solutions, whose flagship solution is OneList Approvals – an executive decision support suite that helps executives make more strategically aligned, more informed and more timely business decisions. www.iqxbusiness.com

Re-engineering the Digital Workplace Don't Automate, Facilitate

By Magnus Revang and Brian Prentice, Gartner Inc.

The success that enterprises have had automating their business processes and employee workloads with IT is coming to an end. As nonroutine, cognitive work increases, application leaders should adopt a digital humanist approach to building systems that creates value for the modern digital workplace.

For decades, enterprise IT has successfully used technology to automate routine work. The focal point of that work has been business processes. Finding, defining and optimizing formal processes have played to the strengths of digital computational technology — so much so that, for many, IT and process automation are seen as synonymous. This perspective drives a significant amount of enterprise IT effort.

In those areas in which work doesn't follow a prescribed set of steps amenable to a Unified Modeling Language (UML) diagram — for example, personal or group productivity — the tendency of enterprise IT organizations has been to see these as automated workloads resulting from the use of a specific form of technology. For example, written communication is a workload automated by a word processor. Asynchronous, text-based interaction is a workload automated by email or instant messaging.

The perception that IT is most beneficial when directed at creating process efficiency benefits for an organization through the removal of human involvement or eliminating mundane, inefficient and repetitive activities that people do is what Gartner refers to as digital machinism. Enterprise IT is largely digital machinist in outlook, which is understandable. Digital machinism has served organizations well for decades. So, why would we change this way of thinking? Why change a winning formula?

Everyone is familiar with many of the similar changes facing enterprise IT today — shadow IT, citizen development and the consumer technology invasion inside the enterprise. We believe that these are symptoms of a broader issue. The problem is an incompatibility with the digital machinist philosophy and the emerging digital workplace. Ironically, this incompatibility is a direct result of the historical success enterprises have had with digital machinism.

The years of success in automating processes and workloads has produced the desired effect. There has been a dramatic reduction in routine, noncognitive work conducted by employees, which is being replaced by nonroutine, cognitive tasks. The U.S. Census Bureau found that there's been a 50% increase in nonroutine occupations during the past 40 years (see Figure 1). Other research has shown that this is limited to certain occupations; however, nonroutine, cognitive work is increasing across all job categories.

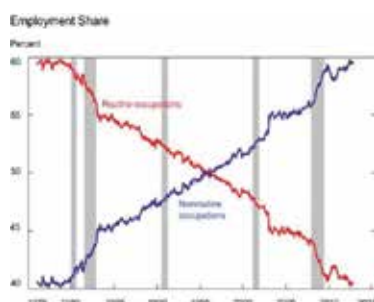


Figure 1. Routine Versus Nonroutine Occupations Source: U.S. Census Bureau

Systematized nonroutine work is an oxymoron. By definition, nonroutine work cannot be expressed as a routine process. Technology optimists might suggest that, someday, there will be systems of automation with complex algorithms that can adapt instantaneously to evolving business conditions.

However, should such a development ever occur, it will take so long to happen that it will not alleviate today's very real problems. The real question is how can enterprise IT create systems now that map to the new digital workplace driven by the non-routine, cognitive work that occurs in ambiguous contexts. This requires the realization that there is a paradox of automation in the digital workplace:

The more success organizations have in using technology to automate work, the less successful they'll be if they continue to do so.

Most enterprises have reached a tipping point where increasing the number of automation systems no longer serves the needs of the organization the way it once did. The needs of the organization are shifting toward increasing satisfaction, loyalty, creativity, collaboration and innovation through employee empowerment.

Different outcomes demand a different approach. Continuing with a digital machinist approach will widen the gulf between delivered systems and the needs of a digital workplace, as well as fuel discontent between enterprise IT and the rest of the organization. Digital humanism is an alternative to digital machinism.

Digital humanism is a philosophy for the design of digital systems that is centered on human interests and values. Digital humanism sees technology as becoming virtuous when it enables people to achieve things they never believed possible or when it redefines the way people's goals can be achieved. If we see the workforce as made up of people who want to be professionally engaged in achieving the organization's goals in an environment of shared principles, then this principle can easily be extended to the digital workplace.

Gartner's Digital Humanist Manifesto lays out broad principles that can guide organizations in the pursuit of this system design philosophy. As digital humanism is applied to the digital workplace, there will be a series of more-specific impacts to which solution architects and application leaders will need to adapt (see Figure 2).

Impacts	Top Recommendations
Digital humanism demands that solution architects and application leaders reimagine how value is determined for employee-centric IT systems.	<ul style="list-style-type: none">• Select, or create, metrics applicable to employee empowerment-based outcomes.• Don't limit empowerment-based outcome metrics to justifying sponsored project costs; compare different projects, whether new or part of a broader application rationalization initiative.
Solution architects and application leaders need to reassess the approaches used in system design and make key process changes.	<ul style="list-style-type: none">• Gather insight into the ways nonroutine, cognitive work and collaboration is empowering employee performance.• Map working patterns in journey maps to identify key areas of improvement.• Pilot new, off-the-shelf software in small groups, and make adoption and feedback key success criteria for vendor selection.

Figure 2. Impacts and Top Recommendations for IT Automation Success Is Creating a Digital Humanism Imperative Source: Gartner (March 2015)

Gartner expects software that automates process and workloads to produce several outcomes:

- Efficiency

- Cost reductions
- Predictable outcomes through prescribed behavior
- Stability that reduces unplanned problems

However, when we talk about non-routine work, we are looking for different outcomes — outcomes that are more in line with empowerment:

- Engagement
- Individual initiative
- Innovation
- Collaboration

The first challenge is that enterprises have well-established techniques to quantify the payback of outcomes traditionally associated with systems that automate processes and workloads. However, outcomes such as engagement, individual initiative, innovation and interconnectedness seem ephemeral.

There are two important points:

In many cases, quantifying the benefits of automation may seem obvious, because so much effort has been expended in the past trying to come up with ways to measure complex interdependencies in automation systems. Just 15 or so years ago, solution architects and application leaders needed to determine ROI calculations, because the quantifiable benefits of many systems and technology were simply not obvious.

A common component used in many ROI calculations is time saved by employees; however, as we've pointed out, the time being saved in routine tasks is being reallocated to nonroutine, cognitive work. This reality makes the need to effectively measure empowerment-based outcomes even more urgent.

What the growing mandate for digital humanism needs is a specific commitment by solution architects and application leaders to seek out and actively apply metrics attached to empowerment outcomes. This is no different than the effort made in the past to identify ROI models.

The good news is that these metrics are emerging and evolving today — for example:

Engagement — Survey-based measurement tools for engagement are already in use in many organizations and can be extended to include insight into the impact of technology on employee engagement.

Individual Initiative — Usage patterns for Web-based or app-based software can be collected with standardized tools and be used to gauge how the solution is used and not used. Certain usage patterns will be evidence of proactive use, whereas other usage patterns will point to problems with usability.

Innovation — Practices such as innovation accounting or the capture of ideas in innovation portals can be used to gain insight into the overall innovation efforts that are going on in the organization. Digital humanist projects can positively influence the innovation initiatives.

Interconnectedness — Social network analysis tools can determine things such as specific individuals' levels of influence within a group, the number of people to whom individuals are connected or people who are connected to key external networks. The digital humanist project can positively influence these areas for key employee constituents.

When designing and creating solutions using a digital machinist approach, we commonly:

- Map processes
- Rely on role-based access
- Use acceptance criteria

When empowerment is the goal, the outcome we seek is different. Therefore, we need to approach the design and creation of solutions differently. This does not mean that we're no longer automating. Instead, the ultimate goal is not the reduction of human labor, but more-efficient and empowered use of it. As a

result, the approaches needed are:

- Creative briefs
- Persona-based functional compositions
- Employee task completion analyses
- Employee journey mapping
- Contextual inquiries and other forms of observational research

As these different approaches are applied, it's important to recognize that there will be different characteristics between the process and workload automation of digital machinism and the empowerment objectives of digital humanism. The characteristics we normally associate with the former:

- Are supported by a business domain owner
- Expose complexity directly with little or no abstraction or interactions intended to help understanding
- Involve standard tools and required process steps

However, digital humanist systems involve different characteristics:

- Perceived as purposeful by a specific persona
- Abstracting complexity through alternative conceptual interactions based on contextual relevance
- Optional — employees are free to use better alternatives should they emerge

The optional characteristic is particularly important for solution architects and application leaders to understand. Solutions focused on process and workload automation tend to be mandatory. The impulse is to treat empowerment tools the same way. However, the implication of such a decision on solution architects and application leaders is profound.

Unless they deliver the near impossible - a perfectly designed system for everyone and a commitment to maintaining that perfection in perpetuity as business conditions evolve - they will drive employees to interact with these systems as little as possible, while creating a sense that they are the mandating "necessary evils" on their staff.

To some extent, we're suggesting an added metric, albeit a more informal one. Do employees want to use the systems that you're providing them? If they do, that should be seen as a key factor in recognizing that you are perfecting the process changes needed with the digital humanist philosophy.

If not, the question is how should you respond to that reality. If the reaction is to clamp down on staff, restrict their access to alternatives and penalize them for nonuse, then nothing is really being achieved. When systems provided by enterprise IT fall out of favor with employees, enterprise IT has an opportunity to learn what matters to employees. The insights gained should be used to identify areas in which the digital humanist processes being put into place can be improved.

Recommendations:

- **Gather insights into how nonroutine, cognitive work and collaboration is being performed in the company to inform ideation sessions on how to empower employees to perform better.**

- **Map working patterns in the form of journey maps to identify key areas for improvement.**

- **Pilot new, off-the-shelf software extensively in small groups. Make user adoption and feedback key success criteria for vendor selection.**

- **Digital humanism demands that solution architects and application leaders reimagine how value is determined for employee-centric IT systems.**

- **Solution architects and application leaders need to reassess the approaches used in system design and make key process changes.**

Goodbye Spreadsheets, Hello Alternatives

By Robert Kugel

In our benchmark research at least half of participants that use spreadsheets to support a business process routinely say that these tools make it difficult for them to do their job. Yet spreadsheets continue to dominate in a range of business functions and processes. For example, our recent next-generation business planning research finds that this is the most common software used for performing 11 of the most common types of planning.

At the heart of the problem is a disconnect between what spreadsheets were originally designed to do and how they are actually used today in corporations. Desktop spreadsheets were intended to be a personal productivity tool used, for example, for prototyping models, creating ad hoc reports and performing one-off analyses using simple models and storing small amounts of data. They were not built for collaborative, repetitive enterprise-wide tasks, and this is the root cause of most of the issues that organizations encounter when they use them in such business processes.

Software vendors and IT departments have been trying – mainly in vain – to get users to switch from spreadsheets to a variety of dedicated applications. They’ve failed to make much of a dent because, although these applications have substantial advantages over spreadsheets when used in repetitive collaborative enterprise tasks, these advantages are mainly realized after the model, process or report is put to use in the “production” phase (to borrow an IT term).

To date most dedicated applications have been far more difficult than spreadsheets for the average business user to use in the design and test phases. To convince people to switch to their dedicated application, a vendor must offer an alternative that lets users model, create reports, collect data and create dedicated data stores as easily as they can do it in a desktop spreadsheet.

Spreadsheets are seductive for most business users because, even with a minimum amount of training and experience, it’s possible to create a useful model, do analysis and create reports. Individuals can immediately translate what they know about their business or how to present their ideas into a form and format that makes sense to them. They can update and modify it whenever they wish, and the change will occur instantly.

For these business users ease of use and control trump putting up with the issues that routinely occur when spreadsheets are used in collaborative enterprise processes. Moreover, it’s hard to persuade “spreadsheet jockeys” who have strong command of spreadsheet features and functions that they should start over and learn how to use a new application.

Those who have spent their careers working with spreadsheets often find it difficult to work with formal applications because those applications work in ways that aren’t intuitive. Personally these diehards may resist because not having control over analyses and data would diminish their standing in the organization.

Nevertheless, there are compelling reasons for vendors to keep trying to devise dedicated software that an average business user would find as easy and intuitive as a desktop spreadsheet in the design, test and update phases. Such an application would eliminate the single most important obstacle that keeps organizations from switching.



156	84	1
3914	482	208
3859550	1926882	1054
3727	296	3294
234627	84251	621
9212	1876	7018
2865	228	2536
4842	795	2328
3609	740	3138
887		487

The disadvantages of using spreadsheets are clear and measurable. One of the most significant is that spreadsheets can waste large amounts of time when used inappropriately. After more than a few people become involved and a file is used and reused, issues begin to mount such as errors in data or formulas, broken links and inconsistencies. Changes to even moderately complex models are time-consuming.

Soon, much of the time spent with the file is devoted to finding the sources of errors and discrepancies and fixing the mistakes. Our research confirms this. When it comes to important spreadsheets that people use over and over again to collaborate with colleagues, on average people spend about 12 hours per month consolidating, modifying and correcting the spreadsheets. That’s about a day and a half per month – or five to 10 percent of their time – just maintaining these spreadsheets.

Business applications vendors started to address business users’ reluctance to use their software more than a decade ago when they began to use Microsoft Excel as the user interface (UI). This provides a familiar environment for those who mainly need to enter data or want to do some “sandbox” modelling and analysis.

Since the software behind the UI is a program that uses some sort of database, companies avoid the issues that almost arise when spreadsheets are used in enterprise applications. There also are products that address some of the inherent issues with such as the difficulty of consolidating data from multiple individual spreadsheets as well as keeping data consistent.

Visualization software, a relatively new category, greatly simplifies the process of collecting data from one or more enterprise data sources and creating reports and dashboards.

As the enterprise software applications business evolves to meet the needs of a new generation of users, it’s imperative that vendors find a way to provide users with software that is a real alternative to desktop spreadsheets. By this I mean enterprise software that provides business users with the same ability to model, create reports and work with data the way they do in a desktop spreadsheet as well as update and modify these by themselves without any IT resources.

At the same time, this software has to eliminate all of the problems that are inevitable when spreadsheets are used. Only at that point will a dedicated application become a real alternative to using a spreadsheet for a key business process.

Robert Kugel is research Director at Ventana Research
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BI and Big Data: Same or Different?

By Boris Evelson

Webster dictionary defines a synonym as "a word having the same or nearly the same meaning" or as "a word or expression accepted as another name for something." This is so true for popular definitions of BI and big data.

Forrester defines BI as:

A set of methodologies, processes, architectures, and technologies that transform raw data into meaningful and useful information used to enable more effective strategic, tactical, and operational insights and decision-making.

While BI has been a thriving market for decades and will continue to flourish for the foreseeable future, the world doesn't stand still and:

- Recognizes a need for more innovation. Some of the approaches in earlier generation BI applications and platforms started to hit a ceiling a few years ago. For example, SQL and SQL-based database management systems (DBMS), while mature, scalable, and robust, are not agile and flexible enough in the modern world where change is the only constant.
- Needs to address some of the limitations of earlier generation BI. In order to address some of the limitations of more traditional and established BI technologies, big data offers more agile and flexible alternatives to democratize all data, such as NoSQL, among many others.

Forrester defines big data as:

The practices and technologies that close the gap between the data available and the ability to turn that data into business insight.

But at the end of the day, while new terms are important to emphasize the need to evolve, change, and innovate, what's infinitely more imperative is that both strive to achieve the same goal: transform data into information and insight. Alas, while many developers are beginning to recognize the synergies and overlaps between BI and big data, quite a few still consider and run both in individual silos.

Contrary to some of the market hype, data democratization and big data do not eliminate the need for the "BI 101" basics, such as data governance, data quality, master data management, data modeling, well thought out data architecture, and many others. If anything, big data makes these tasks and processes more challenging because more data is available to more people, which in turn may cause new mistakes and drive wrong conclusions. All of the typical end-to-end steps necessary to transform raw data into insights still have to happen; now they just happen in different places and at different times in the process.

To address this challenge in a "let's have the cake and eat it too" approach, Forrester suggests integrating the worlds of BI and big data in a flexible hub-and-spoke data platform. Our hub-and-spoke BI/Big Data architecture defines such components as

- Hadoop based data hubs/lakes to store and process majority of the enterprise data
- Data discovery accelerators to help profile and discover definitions and meanings in data sources
- Data governance that differentiates the processes you need to perform at the ingest, move, use, and monitor stages
- BI that becomes one of many spokes of the Hadoop based data hub
- A knowledge management portal to front end multiple BI spokes
- Integrated metadata for data lineage and impact analysis

Our research also recommends considering architecting the hub-and-spoke environment around the three following key areas:

- A "cold" layer based on Hadoop where processes may run slower than in DBMS but the total cost of ownership is much lower. This is where the majority of your enterprise data should end up
- A "warm" area based on DBMS where queries run faster, but at a price. Forrester typically sees <30% of enterprise data stored and processed in data warehouses and data marts
- A "hot" area based on in-memory technology for real time low latency interactive data exploration. While this area requires the most expensive software/hardware investments, real time data interactivity produces tangible business benefits.

Boris Evelson is an analyst with Forrester Research specialising in business intelligence (BI)



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ABBYY adds content capture and data analytic solutions

ABBYY has announced three software development kits (SDKs) designed for applications that retrieve business-relevant knowledge from unstructured information and turn big data into manageable corporate asset. All products are based on the company's technology for natural language processing, which is claimed to understand the meaning of processed text with almost human precision.

ABBYY InfoExtractor SDK is designed to extract critical data from unstructured information for business analytics and strategic decision making. When processing textual data, the SDK operates on the level of meaning to identify entities, facts and relationships between them – including information like names of people and organisations, dates, geographic objects, events such as speech activities, commercial deals, or facts like employment and family relationships.

ABBYY's Optical Character Recognition (OCR) technology is also included into the InfoExtractor SDK enabling the analysis of scanned files and PDF documents. In comparison to traditional rule-based or statistical approaches, ABBYY says the language-based analysis of the InfoExtractor SDK delivers deep insight into meaning and relations.

The Intelligent Search SDK aims to turn traditional enterprise search into a genuine exploration tool, enabling users to efficiently unearth all required data across huge volumes of unstructured content. This is accomplished via its semantic capabilities, which ABBYY claims to be able to understand the exact meaning of words and sentences, thus ensuring high accuracy and fullness of search results.

Lastly, the new ABBYY Smart Classifier SDK offers innovative language-based classification technology. It delivers syntactic and semantic analysis of document content to accurately assign all documents into predefined categories. ABBYY says the SDK will allow businesses and organisations to significantly increase content accessibility and transparency.

With highly accurate and consistent classification results, delivered by the ABBYY Smart Classifier SDK, organizations can automate many processes that require document sorting, routing and archiving.

ABBYY SDKs can be integrated directly into enterprise information environments for the creation of content-intensive business processes that require reliable and granular content analysis.

ABBYY InfoExtractor, ABBYY Intelligent Search and ABBYY Smart Classifier are available as SDKs. For more information, visit <http://www.abbyy.com/infoextractor>, <http://www.abbyy.com/isearch> and <http://www.abbyy.com/smartclassifier>.

Contact sales@abbyy.com.au or 02 9004 7401 for any further information.

Attensity launches text analytics toolkit

Attensity has announced its new Semantic Annotation product that is designed to integrate into existing enterprise systems to automatically and intelligently extract highly accurate real-time insights from large volumes of disparate data.

This technology delivers sophisticated concept analysis and discovery based upon ideas present in common language, as opposed to relying on traditional keyword approaches that require the presence of specific words. That makes it possible to uncover formerly unknown themes, relationships, and context in massive data sets and gather new insights into trends, challenges and business opportunities.

By rapidly parsing large amounts of unstructured text from any type of document provided – a task that would take humans hundreds, if not thousands, of man-hours – Attensity's Semantic Annotation SDK provides a myriad of actionable insights, making

filtering, querying and discovery easier than ever before.

Through the use of Attensity's patented Natural Language Processing (NLP) technology, IT professionals, engineers, developers or analysts can decipher and surface sentiment, categories, relevant entities and "themes," despite variations in grammatical or linguistic expression, including emoticons, synonyms and polysems.

Attensity's Semantic Annotation helps any company that handles massive amounts of data, who do not wish to deviate from using their own enterprise analytics tools. For example, because the SDK can easily integrate into a workflow to provide NLP mark-up to current tools, an enterprise could use Attensity's Semantic Annotation to monitor external information, such as social and news media, as well as internal information, like customer surveys or calls, in order to keep a pulse on the market and audiences.

Attensity says that while the technology is highly sophisticated, the process itself is quite simple. Semantic Annotation Java-based architecture allows it to easily integrate with a myriad of systems and core technologies to enable search beyond just relevant keywords or statistical patterns. By combining and analyzing the linguistic structure of words and the relationship between a sentence's subject, action and object, Attensity's Semantic Annotation "reads" text to recognize sentiment and themes.

Additional features of Attensity's Semantic Annotation include:

- Annotation Results Set makes filtering/querying easier thanks to already-connected data model;
- Secure, on-premise deployment use via a bundled platform;
- Industry-specific domain-based libraries;
- Supports native and client-server configurations;
- Ability to act on text in any document provided;
- Language support for English, German, French, Spanish, simplified Chinese (Mandarin), and Turkish;
- Analysis of annotations to measure document language, sentences, sentiment and more;

For additional information, contact sales@attensity.com

AA2iA TextReader recognises full printed and cursive handwritten text

A2iA has unveiled its newest software toolkit, A2iA TextReader, which can be used for printed and cursive text recognition, enabling all types of documents be transformed into searchable and editable formats – without the use of a dictionary.

A2iA TextReader does not require any customisation, even for cursive handwriting. Rather than combining several OCR & ICR recognition engines, A2iA TextReader boasts a new approach to full-text transcription. Users gain complete processing control over the document recognition settings and results, as the engine can return both a literal transcription and data extraction from any format of information.

Product Features include:

- Full text recognition based on RNN technology;
- Language support for English, French and Arabic;
- Additional languages in development;
- Cursive recognition without a dictionary; Enhance results with a user-defined dictionary;
- Extracts all types of information, whether printed or handwritten, alpha, numeric, or alpha-numeric handled solely by the customer;
- Extended character support, alpha numeric capabilities; and
- Many image formats supported, including: JPEG, BMP, TIFF, PDF.

www.a2ia.com

Reducing the paper trail at trial

The legal industry has come a long way in the shift to a paperless world, with many processes during the litigation lifecycle including the filing of documents, electronic discovery and document review being managed electronically. In Federal law matters for example, an electronic filing facility called "eLodgment" can be used for the lodgment of applications and supporting documents. In Victoria, the Supreme Court has developed an electronic filing and case management system known as "RedCrest".

The efficiencies however are not always being realized at the final stage of litigation, where the standard approach to prepare for trial is to prepare multiple copies of the court book in hard copy. Depending on the size of the matter, this can be an expensive exercise. Not only does printing cost money, but so does the cost of managing paper during trial and storing it afterwards.

As electronic filing and electronic discovery become the de facto standards, the transition to an electronic trial should become easier. Electronic trials cost money too, but a well-managed electronic trial is certainly capable of being faster, cheaper, and more efficient.

A recent class action in the Supreme Court of Victoria is an excellent example of the time and cost savings that can be made. At the conclusion of the 12 month trial, the trial judge commented that even using conservative time estimates, "the trial time required would probably have increased by 25 to 30 per cent using paper". Underpinning the time saving was the reduced time to put a document before the Court. Whilst in a hard copy trial, going to the next document requested by counsel often requires the judge and witness to shuffle through folders, tabs and pages often taking 10-30 seconds or more, the electronic presentation system used delivered the right page in under 2 seconds on average.

Of course, for the efficiency gains of an electronic trial to be realized, all of the parties need to buy into it and to get buy in, the practical advantages over and above saving time, cost and trees, need to be demonstrated. The ability to access to the court book from any location at any time, with 24/7 support is certainly one advantage, as are efficiencies in general administration tasks. This includes automatic tracking of documents presented and tendered at trial and bidirectional linking of documents. The latter contributes to the usability of documents in



ways a hard copy bundle never could - when reviewing a particular document in the electronic court book, the user can straight away see a link to every other document where it is referred to (witness statements, transcripts, submissions etc.).

Finally and perhaps most importantly, parties need to be assured that they can still work the way they are used to. This means that processes need to be flexible. Rigid rules such as requiring parties to provide 24 hours' notice before documents can be uploaded to the court book will frustrate the parties and become a barrier to adoption at future trials.

At the end of the day any "electronic" process, no matter which stage of the litigation process it occurs, needs to be synonymous with ease of use and efficiency. The courts, the parties and the service providers all need to work collaboratively to achieve this and perhaps then we will see a reduction in the paper trail and a faster resolution of disputes.

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Data Migration Strategies: Retiring non-production backup platforms

By Jim McGann

Many companies choose to move to a new backup platform that provides better functionality, support or simply superior integration within their storage environment. Others have inherited non-production backup environments through a merger or acquisition. Either way many companies must maintain a legacy backup software instance in order to continue to access aged content on tape for legal or compliance purposes.

But the benefits outweigh the procrastination as once data with business value is migrated from legacy tape there is no need to maintain this legacy environment. This will result in cost savings through the retirement of the old backup software maintenance as well as data centre resources and management overhead.

This also provides a key opportunity to decide what data needs to be preserved and what is redundant, outdated or trivial which is something your legal and records team should have a grip on.

There are three recommended backup data migration strategies that enable intelligent management and access to relevant data for legal and compliance needs. The method ultimately chosen depends on industry and company policies to determine what content has business value. This is best decided by working with legal and records management.

Single Instance of All Data

For organizations that cannot determine what should be preserved and what no longer has value, migration of a single instance of legacy backup data from highly redundant tape or disk into an accessible and manageable online archive is the solution.

This allows for legal and records to manage the data going forward where they can determine retention periods and purge what is no longer required. For IT organizations this represents a savings in offsite tape storage as tapes can be remediated once the migration is complete. This also saves ongoing tape restoration costs and provides more efficient support for eDiscovery and compliance requirements.

Single Instance Email, Specific File Types

Many organizations are only concerned with legacy email or a specific file type (i.e. PDF, Excel, etc.) as this content contains important corporate records or sensitive communications that must be preserved and archived.

Preserving a single instance of email or specific files from legacy backups is a much smaller subset and simplifies the migration process, especially if you can define a date range and not extract data that has outlived its retention requirements. This data can then be managed according to existing legal hold and retention policies and content that no longer has value can be purged.

Selective Culled Dataset

The most efficient method of migrating data from backup images is using a culled dataset. A culled dataset is based on what business records are required for long-term preservation. If legal and records management have a defined policy as to what is required for legal hold, compliance and other regulatory requirements, this criteria can be built into the migration strategy and only this content can be restored and persevered. This would typically represent less than 1 percent of the tape content.

Once a strategy is chosen, the migration process can begin. The first phase of this process is optional but in many instances it can significantly streamline the process. The catalogue is the key to providing knowledge and access to the legacy tape data. If it is not available or cannot be ingested it can be recreated by scanning tape headers to determine the content.

Once the catalogue is ingested or created, the legacy backup software can be retired and eliminated from the data centre as it will no longer be required for data access and restoration.

Ingestion of the catalogue allows for all the metadata to be indexed including the backup policies. An assessment and analysis of the backup content can then be performed in order to further define the migration strategy to one of the three above. From there, data can be reported on further and culled down. Some of the migrated content may be outside any retention periods, some may be a file type with no long-term preservation value (databases, log files, etc.), some may exist on hosts or servers that have no sensitive content that would require archiving.

Disposition strategies can include migration to cloud sources, archives, network storage and more, saving the organization money and the time of managing legacy data sources.

Jim McGann is vice president of information management company Index Engines. www.indexengines.com



Who cares about information management?

By Dr. Vanessa Douglas-Savage

Information is at the heart of most work people do, and is widely understood as an organisational asset. However, it's an intangible asset and can be difficult to articulate benefits for. After all, how can you touch information in the same way that you can a computer?

One of the questions as consultants we always get asked is, "So how do we get staff interested in information management initiatives?" Sometimes this is related to executive support (business cases or in a sponsorship capacity), or it might be the adoption of a new system or process. Either way, it's a common stumbling block for many information management teams.

Why aren't they interested?

At Glentworth, we are passionate about helping organisations to leverage information to create value. Essentially, we are information nerds. Sadly, we have to admit that not everyone shares our passion. Identifying that there is an information issue, and then getting support from the broader organisation for information management initiatives can be hard.

And to be fair, we don't have the same passion that drives us to understand the ins and outs of accounting, HR activities or logistics. We just expect our money to be managed, people hired and stuff to be delivered. The same goes for most people when you talk about information management – they don't care about the detail; it's the outcome that matters. So how do you get people involved, and keep them interested in your IM projects?

Keeping it relevant

The fastest way to make IM interesting to the disinterested, is to talk about solving business problems.

Think about the difference between the following two project statements, as they might apply in a highly regulated business.

Version 1: We need to upgrade our eDRMS to improve records management.

Version 2: We need to ensure our licence to operate is not impacted by the inability to retrieve our compliance documents.

Version 1 is clearly written by an IM professional. And while they are focused on delivering the outcome of reducing business risk, it's not immediately clear for non-IM specialists. To understand the first statement, the reader needs to understand what a record is, and what records management involves, as well as what an eDRMS is (electronic document and records management system). Version 1 also gives no indication of the scope of either records management or the eDRMS; will everyone be affected, or is it just the records management team?

On the other hand, version 2 is focused on a business problem and what needs to be done to solve it. Sure, it's really saying the same thing, but this time in a way that non-IM staff can relate to. Mentioning licence to operate immediately gains attention, as any commercial organisation needs to continue operations to remain viable. Focusing on compliance documents also describes the scope of the project, immediately helping your reader to understand what will be impacted. Fewer terms to explain means less confusion and that your project team can focus on delivering outcomes that improve business operations.

Linking information management projects to business problems isn't always simple, especially for foundational projects that are required to get your information and data into order. For example, a consolidated business glossary is hardly the most exciting project, but for business intelligence initiatives, it's a crucial piece. Similarly, if executives are looking to quantify theories with facts, then data that is inconsistent, incomplete or out of date

Answering a cry for help

Frustration: I can't find anything on the intranet.

Potential Solutions: Is there an underlying information architecture issue that affects navigation? Does the intranet search function work as intended?

Frustration: I don't know where to store information, so I keep local copies of everything.

Potential Solutions: Do staff need additional training to refresh their knowledge of where and when to store different information? Could a small graphic that explains when and where to store different information be helpful?

Frustration: Everything is siloed by team and I can't access it!

Potential Solutions: Does your security model support sharing of information, or does it create barriers? Can other staff find and access information, within defined governance arrangements?

will reduce their trust and confidence, undermining their ability to make evidence-led decisions. Data management and data quality projects are central to effective decision-making, even though they operate behind the scenes. Helping your sponsors to see and understand what foundations are required – making the invisible visible – is one of the challenges faced by contemporary information management practitioners.

Putting it into practice

So, you need to understand business challenges, but where do you start? How do you sell the services and expertise of your information management group?

Firstly, you need to engage with staff across the organisation to understand what they do and how they do it. Even if you think you already know the answers, check again to make sure that you are on track.

The fastest approach to gain this understanding is to go and ask people what they are frustrated with. This will allow you to identify common themes and complaints. Once you know what is wrong, you can start to identify the underlying issue(s). Sometimes it won't be about information, but there is nearly always something you can help with. Demonstrating the value of IM initiatives can be challenging. Making sure that you communicate in business language, with clear outcomes and benefits, will go a long way to demonstrating the value of information management within your organisation.

Senior Glentworth consultant Dr. Vanessa Douglas-Savage is an information management specialist who specialises in information privacy, knowledge management and information management and holds a PhD from Griffith University. Her dissertation explored the context surrounding Knowledge Management (KM) within organisations, to identify opportunities for IT support.



How do you ensure Document Solutions get adopted by users?

By Noel Williams

The document solutions that we are talking about are ones that streamline or automate the generation of emails in Outlook and documents in Microsoft Office (specifically Word, Excel and PowerPoint) and also solutions that manage such electronic documents and emails. All too often these new document solutions, especially ones that utilise Microsoft SharePoint, fail to be adopted by their intended users.

What are the characteristics of document solutions that lead to good levels of user adoption? Do the document solutions in your organization have these characteristics? In this article we take a look at some document solutions for which user adoption has been successful and identify the key elements that made it work. These solutions all employ the MacroView Document Management Framework (DMF) to extend the native document management capabilities of SharePoint.

Better Office integration

The great bulk of organizations have never invested in a traditional DM system, but they are looking to step up from using Outlook folders to store emails and file shares to store other type of documents. With its in-built document management capabilities, Microsoft SharePoint appeals as a cost-effective way to make that next step. In many cases the cost effectiveness is increased because the organization already owns SharePoint licenses. However there are also many reports of how the attempted move to SharePoint for managing documents and emails was not successful – typically because users found the new SharePoint approach non-intuitive, inconvenient and generally quite non-user-friendly.

Excelerate Energy L.P. is an organisation where the move to SharePoint as the new way of managing documents and emails has been a real success in terms of user adoption.

Excelerate is the pioneer and market leader in innovative floating LNG solutions. Headquartered in Houston, Texas, Excelerate has a presence in Buenos Aires, London, Rio de Janeiro, and Singapore. Operating in a regulated industry, Excelerate had a strong need to improve the way it was managing both documents and emails.

Charlie Price, Excelerate IT Manager, explains: “Based on our research we were well aware that the user experience provided by SharePoint out of the box was not good – users cannot even drag and drop to save emails the way they can in Outlook itself. We found a bunch of add-ons that would let you drag and drop and generally improve the experience of using SharePoint from Outlook. But in the end we went with MacroView DMF because it also enhances the experience for users working in Word, Excel and PowerPoint and in Windows as well.”

User adoption at Excelerate has been excellent. Feedback from users is that it is important to be able to interact easily with the SharePoint document store while you continue to work in familiar Office applications and also that the interaction experience is consistent across those applications. Excelerate users particularly like the way MacroView DMF lets them search for documents in SharePoint based on their content and/or metadata, without needing to leave their Office application and jump out to the web browser. They also like using the MacroView DMF Explorer application in Windows, which provides the SharePoint alternative to using Windows Explorer for file shares.

Minimising Profiling Fatigue

One way to gain an understanding of what makes users adopt a new document solution is to ask them what they dislike about the previous solution. When we ask users of document management solutions, an answer that comes back every time is the pain of profiling, i.e. of capturing metadata for documents as they are saved and updated.

As they implemented a new SharePoint-based document management solution, US employers association the Mountain States Employers Council took an interesting approach to this issue of profiling fatigue. They knew that they needed to capture metadata in order to enable more flexible searching and generally better management of their documents. So they decided to make the effort of profiling as productive as possible.

MSEC is a case-based business. As each document is saved, the user needs to select the Customer Case to which the document pertains. Those Customer Cases are managed in a line-of-business system, which also handles billing. Each year MSEC processes a large number of Customer Cases, so frequently the document being saved is the first one for a new Customer Case.

As a user saves a document, the profiling dialog displays in order to enable the capture of metadata. The dialog includes a control that allows the user to pick the relevant Customer Case. MSEC had this profiling dialog customized so that if the required Customer Case did not already exist in the LOB system, the user could add it as a new record in the LOB system without leaving the profiling dialog.

Feedback from MSEC users was very positive. Thanks to the new profiling dialog they no longer needed to suspend the saving of a document, go into the LOB system to add a new Customer Case, then restart the save and pick the newly added Customer Case. Instead the new Customer Case could be created and selected as part of profiling the first document for that Customer Case – without any wasted keystrokes.

The MSEC example highlights how by using innovative design, the profiling dialog in a document management solution can be an asset rather than a liability in relation to user adoption.

Fixing the Annoying Little Things

Sometimes it's the little things that make a difference...little things like automatically removing illegal characters from file names, rather than displaying an error message to the user who is attempting to save an attachment to a document management solution.

Third Point Re is a successful re-insurance company operating in Bermuda, with a worldwide customer base. For compliance reasons it is essential that all documents and emails relating to

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re-insurance policies and claims be retained and managed.

Third Point Re had opted to use document management solution that was based on Microsoft SharePoint, with the MacroView DMF software providing the 'front-end' user interface. Third Point liked the way MacroView DMF let them drag and drop to save emails and attachments to SharePoint, especially how the attributes of an email (e.g. To, From, Subject, etc.) were automatically recorded as metadata, without any prompting of the user.

However there was one aspect of using SharePoint that Third Point Re users found annoying – which was the way SharePoint rejected file names that contained a range of illegal characters – such as tilde (~), number sign (#), percent (%), ampersand (&), colon (:), slash (/), etc.

While illegal in SharePoint file names, these characters occurred frequently in the names of attachments that Third Point Re was receiving and wanting to store and manage in SharePoint.

Third Point Re commissioned MacroView to customise the MacroView DMF add-on in Outlook so that as the user saved an email attachment, any illegal characters were removed automatically.

In addition, the original unstripped file name was recorded automatically in an additional metadata column in SharePoint. Subsequently, when the document was retrieved from SharePoint and inserted as an attachment in a new outgoing email, the original file name was re-instated.

The external party receiving the attachment is unaware that the file name had been stripped of its illegal characters as part of Third Point Re saving it to SharePoint.

This relatively small customization led to a real improvement in user satisfaction levels. A frequent task was made less awkward and time consuming, while at the same time ensuring that 'no-surprises' service was provided to external parties.

Making it Easy to Re-use Standard, Approved Content

Something that local government areas around the world have in common is that they generate large numbers of documents. Warringah Shire Council which administers a local government area centred on the Northern Beaches of Sydney, Australia is no exception. As part of moving to a new version to Microsoft Office, Warringah identified some 160 Word templates that needed to be upgraded. Careful analysis revealed that there were really only four base templates, with many variations in content.

Rather than upgrade all 160 templates, Warringah opted to use a product called MacroView ClauseBank, which makes it easy for users to find and retrieve standard, approved text and graphics content and have that content inserted in the Word document that they are working on. Available content items are arranged into a tree structure that the user can browse. The user can also search for content items that contain particular words and phrases. ClauseBank displays fully formatted previews so that the user can confirm that they have found the correct content item. Selected content items are inserted into the user's document at the current cursor position, with all styles and formatting maintained. Content items can also be retrieved into PowerPoint presentations and Outlook emails.

Behind the scenes, ClauseBank content items are stored in a SharePoint site. Each content item (also known as a clause) is a mini-document. Saving a new content item is a matter of saving a new document to a SharePoint library. The loading of a new clause document is made even easier by the way ClauseBank lets users right-click selected content in a Word document and choose Create New Clause. The ClauseBank solution led to improved user adoption of Warringah's new document generation solution. It is a good example of how combining Microsoft SharePoint with Microsoft Office can pay real dividends.

Document Management for SharePoint *The Way You Want It*

"Adoption of SharePoint within our organization has been really helped by the way MacroView DMF makes it easy for our users to save, find and retrieve emails and documents in SharePoint while they work in Microsoft Outlook."

Himanshu Pandya
Senior Manager, Office of the CIO
AEGIS Insurance Services

MacroView

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EzeScan is Australia's most popular production document scanning software solution and product of choice for many Records and Information Managers. This award winning technology has been developed by Outback Imaging, an Australian Research and Development company operating since 2002. With 1000's of seats world-wide, EzeScan enables its clients to substantially reduce the cost of deploying batch scanning and data capture solutions for documents of all types.

With "out of the box" seamless integration with many industry standard EDRMS and/or ECM systems including SharePoint, EzeScan saves both time, money and lowers the risks associated with developing and integrating third party scripting or custom programming.

EzeScan solutions range from basic batch scanning with manual data entry to highly automated data capture, forms and invoice processing.

EzeScan benefits include:

- initiate intelligent automated processes
- accelerate document delivery
- minimise manual document handling
- capture critical information on-the-fly
- ensure regulatory and digitisation standards compliance



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ABBYY FlexiCapture 10 is a powerful data capture and document processing solution that provides a single point of entry for automatic and accurate conversion of forms and documents into business-ready data. FlexiCapture recognizes multiple languages and automates a variety of tasks, such as data entry, document separation and classification by type - providing the data you need, fast. Thanks to its up-to-date technology for document classification and data extraction, this software is easy to configure, use and maintain. The state-of-the-art architecture of ABBYY FlexiCapture 10 allows building solutions that meet a wide range of throughput needs - from cost-effective standalone systems for small-to medium businesses and departments to highly scalable server-based solutions for medium sized and large businesses and government projects. In addition, ABBYY FlexiCapture can be integrated with back-end systems and into specific business processes to improve overall efficiency and reduce costs.



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Objective Corporation is an established leader and specialist provider of content, collaboration and process management solutions for the public sector and regulated industries. Its solutions empower effectiveness, efficiency and transparency, helping organisations deliver better customer outcomes at a lower cost. Objective ECM is widely used by organisations around the world to effectively manage the large amount of content and knowledge that proliferates all levels of government and highly regulated industries, which have complex business environments and stringent security requirements. Designed to maximise user adoption, Objective ECM manages electronic data and information securely and ensures transparency and auditability of documents is maintained with information only accessible by authorised employees. Objective ECM delivers a truly Connected Process Management platform that is designed to be the backbone of an organisation's information and process governance strategy.



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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.



Nuix

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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.



Kapish

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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 & HP Records Manager (HP RM). 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 / HP RM. As a software and services company focused exclusively on HP TRIM / HP RM, we work with 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 / HP RM make recordkeeping a breeze.



MacroView Business Technology

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MacroView Document Management Framework (MacroView DMF) extends and enhances the document management capabilities of Microsoft SharePoint, making SharePoint an attractive replacement for file shares and Exchange Public Folders and a viable alternative to traditional document management systems for managing documents, emails and other files. MacroView Message, a subset of DMF that runs in Outlook, has been used by organisations around the world as the basis for email recording and email retention solutions in Microsoft SharePoint.

Both MacroView DMF and MacroView Message feature excellent integration with Microsoft Outlook. The DMF tree-view enables intuitive viewing and navigation of a SharePoint document store, so that managing documents in SharePoint is as easy and familiar as using Windows Explorer.

MacroView DMF and MacroView Message support SharePoint on-premises and Office 365 and are designed to provide good performance even when working with very large SharePoint document stores.



Fujitsu

Fujitsu Australia Ltd

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Fujitsu, as one of the world's leading document scanner companies for both Desktop and Workgroup scanners, offers compatibility with over 200 different document imaging applications. The result is state of the art image solutions from innovative portable units all the way to large centralized production environments. Fujitsu document scanners are renowned for their performance, remarkable image quality, fail-safe paper handling and Fujitsu's legendary reliability. New innovations include:

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



IQX Business Solutions

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www.onelistapprovals.com

IQX enables executives to make better business decisions. OneList Approvals combines decision tasks across multiple business applications, with all the required supporting documents, in a user-friendly mobile app to make it easier and quicker for executives to take effective action. IQX Process Solutions are ready-to-run applications for collaborative processes including Capital Expenditure Requests, Non-Stock Procurement, and Contract Pricing. These user-friendly mobile-enabled applications incorporate document management, workflow, process monitoring and are actioned through OneList Approvals. IQX apps include adapters for common Enterprise Resource Planning and Business Process Management platforms.



Information Proficiency/

Sigma Data

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Information Proficiency and Sigma Data are at the forefront of Information Management Services and Streamlining Business Processes. We supply and support HP and Kofax software solutions, as well as developing our own range of productivity and connectivity tools based around Kofax and HP Records Manager (HPRM). Focusing on Information Management Technology and Services, we work hard to understand our client requirements, and implement solutions to match. Implementing efficient processes are critical to enhancing productivity, transactional speed, reducing costs and achieving regulatory compliance for your organisation. Our team of industry certified professionals are able to design and deliver systems to meet your requirements. We strive to build lasting relationships with our clients, providing continuous improvement and mature solutions.



Epson

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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.



OPEX Corporation

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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.



Knowledgeone Corporation

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Knowledgeone Corporation has been a leader in the Australian Records and Document management sector since 1986 when the very first RecFind was released.

Our latest product RecFind 6 is a fully-featured Enterprise Content Management solution used by our customers all around the world for:

- Physical/Paper Records Management;
- Electronic Document Management; Document Imaging;
- Business Process Management/Workflow; and
- A huge variety of Information Management applications (e.g., mortgage application processing and contract management)

We are renowned for the quality of our support and the robustness of our products. We believe that RecFind 6 is both the most scalable and most configurable product in the market. Using the free high-level tools supplied, the customer can change almost anything (e.g., data model and work processes) and still have a standard product able to receive regular updates from us. The user interface for each class of user is configurable such that the user only see the data & functionality required to do his/her job.



Glentworth Consulting

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Information is every organisation's greatest strategic asset.

Glentworth is a team of specialists who help organisations solve real business problems through your data and information holdings. In a world where organisations are overwhelmed by millions of pieces of data each day, we enable organisations to take control over their most important asset - information. The core of what we do is based on harnessing the value of information, and enabling organisations to make better, evidence-based decisions. We are trusted advisers to organisations across the commercial, not-for-profit and government sectors. Glentworth consultants specialise in analysing and understanding social and organisational networks, enabling targeted workforce engagement and enhanced employee collaboration and productivity. With a headquarters in Queensland, Australia, Glentworth was founded in 2007 to support the growth of information and data as a strategic business asset.



FileBound

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FileBound is an end-to-end process automation solution for enterprises of all sizes. FileBound is a cloud-native document and work management solution that automates the flow of enterprise work. This comprehensive enterprise content management (ECM) solution features capture, document management, workflow, electronic forms, analytics, mobile access (iOS and Android) and much more. It presents in a single, easy-to-use application that manages business processes from beginning to end and reliably connects people and information. FileBound provides organisational efficiencies, drives out manual paper-based processes to decrease costs, increase productivity and support compliance with internal and external mandates. FileBound users have the flexibility to create a variety of solutions from complex AP automations to simple document archival and retrieval processes.



UpFlow

Phone: 1300 790 360

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PSIGEN, PSI:Capture is an innovative document capture platform engineered to combine automation, efficiency, stability and Enterprise-class scalability. PSI:Capture provides unmatched integration with just about any ECM platform and allows the utmost in flexibility for deployment in large or small organisations. Whether you want a simple scan workflow or complex document capture, PSI:Capture provides a solution to meet your specific needs. Document Capture and Scanning is a challenge in any organization. With an array of scanning devices, capture needs and backend content management systems, it is ineffective to settle for multiple applications to accomplish one goal. PSI:Capture provides a single capture platform that can meet all the needs of an organisation: Use MFPs, copiers, scanners or fax | Run Database Lookups | Dynamically create libraries, folders and file names | Create searchable PDFs | Perform OCR, OMR, ICR | Complete Forms Processing and Classification | Extract Line Items | Verify using a Web based Verification platform | Act as an ECM Onramp. UpFlow are the Asia Pacific Distributors for PSIGEN.



Kodak Alaris launches high speed hero



Kodak Alaris is targeting service bureaus, business process outsourcers (BPOs), and large multinational organisations with the launch of a new high speed scanner model offering throughput of more than 200 pages per minute.

The KODAK i5850 production scanner is designed for operations looking for high volume and speed while avoiding jams and misfeeds and minimising operator intervention.

It incorporates a technology called Intelligent Document Protection that "listens" to the sound of paper passing through and stops the machine if it "hears" paper crumpling. This avoids jams and paper damage from staples and misfeeds that can seriously disrupt operator productivity.

"Production scanners need to process paperwork quickly and deliver great image quality while avoiding misfeeds that can slow down bureau operations," said Tony Barbeau, Products & Solutions General Manager and Vice President, Document Imaging, Kodak Alaris. "The new i5850 Scanner achieves this while offering a range of additional new features."

The i5850 Scanner comes with optical patch reader technology to enhance image addressing. The scanner can apply sequential numbers to documents, making it much easier to track batches and organise documents into files and folders so that each batch is tracked accurately. And the new i5850 Scanner has a front and rear imprinter to date/ time stamp documents without altering the original document.

The i5850 Scanner has no daily volume limitations. It can process up to 210 pages per minute in duplex and dual stream to produce 840 images per minute. Optical resolution of 600dpi enhances Optical Character Recognition (OCR) and Intelligent Document Recognition (IDR) applications.

Kodak Alaris' Perfect Page imaging technology is included to eliminate rescans and operator intervention. The i5850 Scanner also has a height adjustable pedestal to enhance operator comfort.

The KODAK i5850 comes with an optional Controlled Dual Stacking Accessory to separate documents into two exit trays. This allows mixed-size documents such as cheques and invoices to be sorted and patch sheets to be reused to save money.

The KODAK i5850 Scanner is available today with a list price of \$A110,000.

For further information contact francis.yanga@kodakalaris.com

Sherpa Software eDiscovery Solution

Sherpa Software has added an eDiscovery module to its Altitude IG information governance solutions solution. The new module is built specifically for in-house teams to help manage legal hold notification, search and collection for legal discovery requests, compliance requirements or internal investigations.

Sherpa Altitude IG is an on-demand platform that features a hosted back-end, while corporate data remains in place. In addition to eDiscovery, Altitude IG offers data reporting and analytics and policy enforcement modules designed to locate, identify, catalogue and manage corporate electronic data.

Regardless of where users are storing information, Altitude IG eDiscovery can locate the content, apply a set of comprehensive search criteria and create a result set. Searches can be scheduled or on-demand.

Cross-matter custodian management - Create and manage multiple matters simultaneously, Custodians can either be added manually or drawn automatically from the organization's Active Directory (AD).

Legal hold notifications - An end-to-end legal hold notification mechanism notifies custodians through the application. Both the dispatch and the acknowledgement of the notification by the custodian are tracked. Notices can be re-sent and multiple holds can be applied to individual custodians while providing administrative oversight.

Federated search across multiple data silos - A number of criteria are available to identify content relevant to the specific matters. Emails may be searched based on sent/received dates, senders, recipients or content while files may be targeted based on the similar criteria. All content (including password protected PDF files) may be targeted by keywords, phrases and patterns of text. Searchable repositories include:

- Emails stored in Microsoft Exchange mailboxes and archives
- Office 365 mailboxes and archives
- PST files located on user's computers
- Network shares and files stored on user's desktops and accessible network shares
- Content stored in IBM Connections and Microsoft SharePoint.

Scalable architecture with distributed processing - A collection of the tagged items can be initiated from the console; emails and documents will be collected to a pre-defined collection location in native format within the corporate environment along with an EDRM load file, an inventory log of all collected items and an exception log for further inspection.

www.SherpaSoftware.com

Nuix tool finds critical data for compliance and governance

Sensitive Data Finder is a new product from Nuix that looks at a market broader than ediscovery by helping organisations identify high-risk and high-value information wherever it is stored. It is promoted as a way to comply with privacy laws and regulatory requirements, and defend vital information against cybersecurity breaches and inadvertent loss.

"Data breaches are in the news almost every week—and that means it has never been more important to proactively identify and secure your intellectual property and other sensitive data such as personally identifiable and payment card information," said Julie Colgan, Head of Information Governance Solutions at Nuix.

"A common theme that emerges from breach investigations is that the victims couldn't adequately secure their sensitive data because they didn't know what they had, where it was, and who had access to it. If you don't even know where to start looking, this massively drives up the cost of post-breach remediation.

Nuix Sensitive Data Finder applies all of Nuix's searching power - including proximity searches, Named Entities, and optical character recognition - to locate specific information across the contents of individual computers, log files, email systems, file shares, cloud services, databases and other enterprise storage systems.

It is the company's first application of its patent-pending Custom Processing technology, which deploys lightweight Nuix Engine Instances onto endpoints across an organisation to conduct sophisticated searches without storing a permanent index. This enables customers to run rapid distributed sweeps and audits without having to build complex server or storage infrastructure.

For more information, visit www.nuix.com/SDF.

OpenText updates file transfer solution

OpenText has announced the availability of the newest version of OpenText Secure MFT, its managed file transfer solution.

Available on-premises or through the OpenText Cloud, the latest release of Secure MFT has a number of new performance and usability features:

- Performs a file integrity check and guarantees bit-perfect transfers between parties ensuring sent files arrive at their
- Offers single instance storage using file integrity to check for existing files, eliminating the need to upload and store files more than once and resulting in nearly instantaneous transfer.
- Provides high availability (HA) in on-premises, clustered environments for uninterrupted file transfers and continuous access to file transfer data for planned and unplanned outages.
- Supports Mac OSX users, with a desktop client, web client and Dispatch Folders.
- Sends SMS text notifications when a file has been uploaded to OpenText Secure MFT or downloaded by recipients as well as sending administrators a notification of system events such as interruptions in service and low disk storage availability.

When operating alongside OpenText document management solutions such as Content Server, eDOCs or other, Secure MFT allows users to quickly and securely send files, videos, and collections of assets of any file type without size limits.

RecFind gets Web smarts

Australia's Knowledgeone has launched a redesigned Web-client for its RecFind 6 EDRMS platform, with a new user interface optimised both for performance and mobile devices (especially the iPad). The web client can run alongside the standard smart-client and it 'shares' concurrent user licenses with the smart-client. This means some staff can use the smart-client (usually those on the LAN or WAN) while others the web client (usually those in remote locations or traveling with notebooks).

This new interface is specifically designed to be "responsive", meaning it adapts to the screen size of the device being used. The navigation is also designed with touch devices in mind.

A number of minor changes are also included in the new design, such as a single spellcheck icon to check all text fields rather than an icon for each field.

Knowledgeone CEO Frank McKenna said, "The new user interface is very different to the old one and a bit of an experiment. It's now a 'flat' UI (like SharePoint) but in order to know exactly where you are on the screen we use a 'wave-like' function so as you move the cursor through the screen whatever object or control you are on changes slightly in size and colour.

"It is much faster, cleaner and much less 'cluttered' than the old UI and of course, it works much, much better on mobile devices."

"Provide access (the URL) to the web-client for your staff that prefer to work on Macs, iPads or Linux PCs, that work at home or that travel frequently. RecFind 6 now supports just about any browser, any operating system and any working environment.

"You can now support staff anywhere in the world without having to worry about a software installation or software maintenance."

"Best of all, and despite the all-new user-interface, the new web-client still 'looks' and 'feels' very similar to both the old web client and the current smart client so there is no re-training required just a faster, easier on the eye and easier to use UI."

This upgrade is free to all RecFind 6 web client customers with a current ASU.

<http://www.knowledgeonecorp.com/>

Whitebox Security opens up permissions administration

A data access governance solution from Whitebox Security has been enhanced by adding in the ability to administer permissions, allowing IT to manage access to critical systems on an individual or bulk basis for enhanced compliance.

The new feature further automates compliance across file servers, NAS devices and SharePoint. After an access review, the system will remove the rejected entitlements directly, without requiring the administrators to manually make the changes to each system, greatly streamlining the process.

Business users can rapidly access the information they require with the enhanced self-service access request methods. The first is a wizard that allows a user to request permissions, and upon approval, the system automatically updates access. The second can be used within the natural work environment.

When an employee comes across a resource in her purview but for which he or she doesn't have access, they can simply right click the resource to request access. Nothing needs to be installed on the endpoint.

A standard feature of Whitebox Security's system is a "What If" simulation, where permissions can be tested to proactively determine the effects that will result from the required change. Should the simulation be acceptable, the administrator can simply accept the changes, which will automatically be implemented.

www.whiteboxsecurity.com

Anti-Malware scanning for Exchange

OPSWAT has announced the release of the new Mail Agent for Microsoft Exchange Server for their multi-anti-malware scanning and threat prevention product Metascan. The Mail Agent is a result of OPSWAT's recent acquisition of Red Earth Software, developer of email security solutions for Exchange Server.

The new Mail Agent now extends OPSWAT's advanced threat protection technology to email-borne threats.

With the Mail Agent, Metascan can intercept all incoming and outgoing email attachments on Microsoft Exchange Server and quickly scan them with multiple anti-malware engines (up to 30 engines).

When a threat is found, emails can be placed in quarantine for further inspection. Each Metascan license includes a Mail Agent license for up to 25 users, with more users available for purchase.

"Using anti-malware multi-scanning is essential for email security since it significantly increases the malware detection rates and reduces the vulnerabilities created by a specific antivirus engine's limitations," said Mike Spykerman, Vice President of Product Management at OPSWAT.

"We are excited about the release of the Mail Agent for our product Metascan. The addition of email security, along with our server, web and end point security, has brought us another step closer towards reaching our goal of offering a complete solution for securing data work flow from all entry points," said Benny Czarny, CEO at OPSWAT.

<http://www.opswat.com>

Smarter information management key in controlling governance, data storage costs

By Chris Hathaway, Director,
Soarsoft International

Information volumes continue to grow at an unprecedented rate, particularly in the area of randomly generated unstructured user data. This is a result of the way the modern "information worker" interacts and transacts with electronic platforms on a daily basis. In addition, there is an ever increasing number of platform options for users, including e-mail, file, collaboration platforms like Microsoft's SharePoint and Yammer as well as other social media platforms. Many of these platforms add another level of complexity as they may be hosted or cloud-based services and solutions.

The increased data volumes, variety of data sources, and increasing number of data locations, lead to increased complexity when it comes to managing this information, not to mention added costs and risks related to retaining and managing data storage. In addition, legislation around privacy and the storage of personal information means information governance is more important than ever.

Information lifecycle management

Intelligent information lifecycle management (ILM) has thus become a critical tool for organisations, allowing them to make the most of their data.

ILM is also essential in assisting organisations to gain an understanding of what data they have and what data can be safely or "defensibly" deleted in a controlled process, while also preventing storage costs from spiralling out of control.

Having the appropriate policies, processes and technologies to drive the management and defensible deletion of redundant obsolete or trivial (ROT), or "risky" information is essential for maintaining good corporate governance and compliance with legislation like POPI.

Without information governance in place, organisations open themselves up to a myriad of challenges, risks and threats with regard to the data they store. In heavily regulated or litigation-prone industries, this challenge is further exacerbated by the requirement to extract, analyse and review information on demand should investigations or audits be required.

While this is not a new challenge, the need for information governance, including policies, security and e-discovery tools, is becoming increasingly necessary.

Unfortunately, this has become increasingly complex as a result of growing data volumes, cloud services, and other factors such as bring your own device (BYOD) which adds further complexity and data volumes.

The simple reality is that as data volumes increase, so too does the corresponding requirement for an increased and more complex storage footprint. The financial impact of not only storing, but protecting, these large volumes of data is becoming increasingly onerous.

Data retention

Data retention strategies need to adapt. In the past, the prevailing approach was to store all information indefinitely in the event that it was required sometime down the line.

However, hoarding data in this fashion, indiscriminately, beyond its usefulness and even beyond its required retention periods, is a costly exercise. This cost includes not only the storage space required, but the costs of backup, redundancy and network

connectivity, as well as the potential hidden risks within the redundant data. For example, employees may be sending customer information like credit card or account numbers to different departments via email or spreadsheets, which are subsequently stored in mail boxes or unsecured file locations.

Without proper information governance, this risk is impossible to control. In the case of an HR or legal process, the increased cost of e-discovery when data needs to be found and reviewed can also be significant. In addition, as a result of legislation such as the Privacy Act, there is a growing requirement to 'tighten' up data governance and the policies and practices around data within an organisation.

Information management requirements have changed, and both the information strategy and the tools used to implement this need to be reassessed in light of these changing requirements. ILM needs to support a changing information landscape without loss of visibility or control of data, and the tools and approaches used to analyse, control and protect data need to be aligned with this landscape.

This requires smarter information management that is less complex, less costly and more responsive to a dynamic environment, and that delivers a comprehensive, actionable understanding of information.

Policies need to be adequately defined so that information is not over-retained and does not become cluttered, with the result that storage, eDiscovery, risk and security costs can be optimised and prevented from spiralling out of control.

In addition, organisations need a holistic picture of unstructured data, and an awareness of unstructured data volume, composition, risk and business value. This is critical in order to sift the sensitive and valuable information from the clutter of dark data and junk that unstructured data sources are typically a repository for.

The big picture

Tools such as enterprise search, classification, archiving and e-discovery products are solid building blocks, however, they do not provide the efficient, ongoing and holistic picture of that data situation that today's information landscape requires. Meeting modern information management needs requires continuous and on-going access to a clear and accurate 'big picture' view.

By creating an actionable understanding of live data, organisations are better positioned for more effective information governance, and to take advantage of a number of benefits. Tangible savings can be leveraged from reduced storage costs, by identifying junk or legacy data and either disposing of it or moving it to cheaper storage solutions.

Automated, improved policies result in improved governance and enhanced visibility while intelligence around data assets helps to improve security. Risk is mitigated and spend is decreased with e-discovery processes, and business productivity benefits from reduced data clutter. In addition, compliance to regulations such as POPI can be more easily implemented and demonstrated as a result of improved data governance and control.

The information landscape has changed dramatically in recent years, and ILM tools and processes need to adapt to meet these changes. Intelligent ILM, information governance and data management solutions are vital to prevent data storage costs from overwhelming an organisation, and are also critical for compliance and risk management purposes in a data-driven business world.

Open your eyes to sensitive and regulated data

Stored data is a big source of business and compliance risk. It may contain regulated, confidential or sensitive information that must not leak outside your organizational boundaries.

Nuix Sensitive Data Finder applies the power of the patented Nuix Engine to generate Information Transparency™ across the contents of email systems, file shares, archives, databases, and storage systems. Quickly find out what sensitive data you have, where it's stored, and what you can do to protect it.

Start with the facts. Start with Nuix.

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.



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



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



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



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