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SEPTEMBER-OCTOBER 2015

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The new corporate rock star?

eHealth: What is the CMIO's role?

Monash Health's Dr Ronnie Ptasznik

Executive Edge
Ram Kumar, IAG Director of Enterprise Information Management, on Data Governance.

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KM software raises $4M on ASX

Enterprise knowledge management software provider Knosys has raised $A4 million with a successful listing on the Australian Stock Exchange The Company issued 20,000,000 ordinary shares at an issue price of $0.20 cents to achieve a market cap on listing of $A15.6 million.

Founder and Executive Director of Knosys, Gavin Campion, said:"With a fully functional platform, having operational clients including one of the top four large banks, and channel partners including Singtel-Optus and Go Cloud IT Asia, Knosys expects to successfully build upon the results achieved to date."

The platform has the ability to access knowledge from multiple disparate platforms without disruption. By indexing, linking, integrating applications and providing the information in a context relevant to the User's role within the organisation, the Knosys Platform provides a User centric/multi-device consolidated view of an organisation's information sources.

Knosys delivers sales, productivity and satisfaction improvements across large or small organisations by providing a single source of accessible information across the organisation's existing technology platforms. The platform is delivered in the cloud or on premise as a 'Software as a Service' (SaaS) operating expenditure (Opex) model.

www.knosys.it

IBM's new vision for Watson in health

IBM has announced that Watson will gain the ability to "see" by bringing together Watson's advanced image analytics and cognitive capabilities with data and images obtained from Merge Healthcare Incorporated's medical imaging management platform.

IBM's $US1B acquisition of Merge, a leading provider of medical image handling and processing, interoperability and clinical systems designed to advance healthcare quality and efficiency, in an effort to unlock the value of medical images to help physicians make better patient care decisions

Merge's technology platforms are used at more than 7,500 U.S. healthcare sites, as well as most of the world's leading clinical research institutes and pharmaceutical firms to manage a growing body of medical images. The vision is that these organizations could use the Watson Health Cloud to surface new insights from a consolidated, patient-centric view of current and historical images, electronic health records, data from wearable devices and other related medical data

It is IBM's third major health-related acquisition – and the largest – since launching its Watson Health unit in April, following Phytel (population health) and Explorys (cloud based healthcare intelligence).

Medical images are by far the largest and fastest-growing data source in the healthcare industry and perhaps the world – IBM researchers estimate that they account for at least 90% of all medical data today – but they also present challenges that need to be addressed:

The volume of medical images can be overwhelming to even the most sophisticated specialists – radiologists in some hospital emergency rooms are presented with as many as 100,000 images a day.

Tools to help clinicians extract insights from medical images remain very limited, requiring most analysis to be done manually.

At a time when the most powerful insights come at the intersection of diverse data sets (medical records, lab tests, genomics, etc.), medical images remain largely disconnected from mainstream health information.

IBM plans to leverage the Watson Health Cloud to analyse and cross-reference medical images against a deep trove of lab results, electronic health records, genomic tests, clinical studies and other health-related data sources, already representing 315 billion data points and 90 million unique records. Merge's clients could compare new medical images with a patient's image history as well as populations of similar patients to detect changes and anomalies. Insights generated by Watson could then help healthcare providers in fields including radiology, cardiology, orthopaedics and ophthalmology to pursue more personalized approaches to diagnosis, treatment and monitoring of patients.

eRx dispenses 1 billion e-scripts

eRx Script Exchange has announced reaching the milestone of one billion prescriptions dispensed electronically in Australia.

Since its launch in 2009, 89% (4,714) of Australia's pharmacies and 76% (19,930) of Australia's GPs have connected to and are using the exchange.

According to Paul Naismith, pharmacist and CEO of Fred IT Group, "Exceeding one billion electronic dispensing records is real cause for celebration for Australian patients, their doctors and pharmacists. Electronic prescribing and dispensing are two of the most fundamental ways of adding efficiencies in the medication supply process whilst also improving safeguards against potential dispensing issues.

"We are firmly focused on improving and building on the achievement that is already in place. This means connecting more doctors and pharmacies, and continuing to identify ways to further improve eHealth connectivity so that doctors and pharmacists are able to experience the benefits of real-time medications histories, better medicines management and real-time communication with other professionals in their day to day work."

The volume of electronic prescriptions and dispenses has increased exponentially since launch. By July 2015, pharmacies using eRx were electronically dispensing:

- 753,000 electronic prescriptions each day
- 5.2 million each week
- 22.5 million per month
- During peak periods, 25 electronic scripts are dispensed per second.

eRx is delivered in collaboration with 24 of Australia's leading medical and pharmacy software vendors. A further 11 are in the process of integrating and certifying with the network.

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Paperless push failing in Victoria

Victoria's paper mountain continues to grow ever higher, according to a survey of state government agencies by the Public Records Office of Victoria (PROV). Writing on the PROV web site, Alan Kong, Manager of Standards and Policy at the PROV observes that the growth of physical records is not in decline

"Despite the increasing efforts to digitise, we are still seeing a steady growth in the storage of physical records. In fact, we estimate Victorian Government to hold around 800km of records, costing millions of dollars each year in storage costs," he said.

"We also hear anecdotal evidence as to why agencies aren't carrying out much records disposal. One example is because of the high upfront cost of destroying a standard archive box of records stored in a commercial facility, which is equivalent to the cost of one year of storage (of that same archival box).

"However, implementing a disposal program not only ensures the agency fulfil its record-keeping obligations, but in the long term will actually save money, and reduce administrative burden and growth of physical records."

Since 2013, PROV has conducted a number of surveys to determine the volumes, locations and costs of physical records storage held by Victorian Government agencies and within commercial storage facilities.

"Digitised and source paper records are being unnecessarily stored at the same time," notes Kong.

"Another agency shared with us that in many instances, after the completion of a digitisation project, the source paper record and the digitised record are both stored by the agency.

"Not only does this create a disincentive for the agency to conduct further digitisation projects, it also creates further administrative burden.

"At times, there are legitimate reasons to do this, such as the source paper record has value as a physical artefact or there is a requirement imposed upon the agency to keep the records in a particular format. However, in many instances, there is some confusion as to when the source records can be disposed of after conversion to another format," said Kong

Queensland seeks state digital archive

The Queensland Government has issued a worldwide "Expression of Interest" to build the state's first Digital Archive.

Leeanne Enoch MP, Minister for Science and Innovation, said the digital archive will provide Queensland State Archives with a means of managing long-term the rapidly growing volume of digital public records. During its day-to-day administration the Queensland Government has accumulated an enormous amount of digital information that has been difficult for Queenslanders to access.

Acting State Archivist Adrian Cunningham elaborated that 'the public sector holds around 40 petabytes of data, some of which needs to be kept for 50 to 100 years, and that's doubling every 15 months'.

'Printing just one petabyte would use enough paper to stretch from Brisbane to Emerald, printing 40 petabytes of data would stretch approximately from Brisbane to London and back.

"The Digital Archive will be designed for an online, mobile and digitally enabled Queensland. It will also ensure that today's government records will be available for the use of future generations,' Adrian continued.

'Ensuring access to all this digital information into the future is a difficult task, and that is why the Government is calling on innovative companies to work with Queensland State Archives to supply the solutions we need to keep our records both safe and accessible', Ms Enoch said.

"Preserving digital information is difficult because it's dependent on software, hardware and storage media, all of which eventually become obsolete. Storage media like DVDs or hard drives also degrade over time. The creation of a Digital Archive will allow us to address these issues, and maintain today's records for future generations to come."

ANZ signs $A450M partnership with IBM

ANZ, one of Australia and New Zealand's leading banks, has signed a five-year, $A450 million strategic agreement with IBM.

The agreement includes access to IBM's vast software portfolio, an Innovation Lab, next generation cloud development capabilities and core systems infrastructure.

The Innovation Lab is powered by Bluemix, IBM's cloud development platform-as-a-service, and will enable the bank's developers to build, test and deploy new applications and services at a fraction of the time and cost previously taken.

Designed for the mobile era and app economy, IBM will deploy its newest z13 mainframe andPOWER8 infrastructure as part of ANZ's private cloud environment.

IBM integration, content management, data, analytics and cloud software will support ANZ's core banking and infrastructure needs, and will help the Bank gain deeper insights of its nine million customers worldwide to better serve their needs.

ANZ Chief Information Officer, Scott Collary said: "Understanding our customers' needs and preferences around mobile and digital banking is critical to our business and to providing a superior customer experience.

"We therefore need to ensure we're meeting these needs in an innovative, consistent and seamless way and with this partnership with IBM, we're working to achieve this goal."

US mandates use of e-Invoicing by 2018

The United States will be moving towards e-invoicing after the country's Office of Management and budget (OMB) issued a deadline by the end of 2018. Currently, 40% of the 19 million invoices the federal government receives annually are processed and managed electronically. Contractors may be required to submit invoices electronically, if they are not already doing so.

"Electronic payments, obviously, give you the heightened accuracy, the prompt payment and the quick movement of payment of invoices from invoicing to cash in the bank," said Dave Mader, the controller and acting deputy director for management at OMB in a radio interview.

"The reason we want to do [this] is two-fold. One is there is a clear savings to the government from moving from paper to electronic. We have estimates over a couple of studies that show an annual savings of anywhere between $US150 million and $US260 million, which is significant savings.

"I think as important, or maybe more important, the benefit there is to vendors in moving this process to electronic, especially for small businesses who are very concerned about cash flow," said Mader.

ABS seeks new scanners for 2016 Census

The Australian Bureau of Statistics (ABS) is expecting a large increase of electronic lodgement for the 2016 Census, however it still wants to boost its paper scanning capacity with up to 20 new high speed scanners to cope with more than 62 million paper forms

While the Bureau expects that 65 per cent of households will complete the Census online on August 9, 2016, it has issued a tender for five scanners initially. Following testing of throughput scheduled to take place in February 2016, the ABS is leaving open the option to purchase up to 15 additional scanners.

The ABS is continuing to use IBM's Intelligent Forms Processing (IFP) software for optical character recognition (OCR) and Intelligent Character Recognition (ICR), as it has in previous years.

The job of capturing the data submitted on paper forms for the last Census in 2011 was accomplished by over 750 staff utilising a fleet of 11 Kodak i1860 high volume scanners acquired for the task.

Processing for the 2016 Census will take place at the Data Capture Centre (DCC) expected to be in Melbourne.

The scanning workload for the 2016 Census processing is estimated at close to 62 million double-sided sheets, to be scanned in an estimated 50 working days. Scanners will be required to scan the majority of forms to create black and white images.

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Four Lessons Learnt From The Ashley Madison Hack

By Jay Zaidi

We've all heard or read about the juicy details related to the Ashley Madison hack - 37 million customer records stolen and exposed on the internet, for everyone to see. The fact that rogue actors can compromise systems with impunity, should send shivers down our spines.

Lately, a host of other organisations have been compromised - exposing personal, financial and biometric data belonging to hundreds of millions of individuals and government employees and contractors. The severity and frequency of such hacks shows us how vulnerable organisations and individuals are, in a highly dynamic and complex Information Technology (IT) and Data Management environment.

There are very serious implications for registered users of Ashley Madison due to the exposure of their personal and financial data, but there are major implications for each of us too and the organisations we work for.

I would like to share some lessons learnt from the latest expose. Forget Ashley Madison, for a moment, and replace it with: medical records. Your full income tax returns. Your inbox.

The hackers, known as the Impact Team, went after Avid Life Media because of the ineffectiveness of its $23 Full Delete service. They demanded that Avid Life take down Ashley Madison or they would release the data. Users paid the fee to be permanently deleted from Avid Life Media's systems; however, as customers paid using credit cards, all of their details, including their names and addresses, reportedly remained in the database.

After analysing the details of this particular case, I've developed the following scenarios that Avid Life Media was dealing with and the lessons learnt, which apply to all individuals and organisations:

Lesson #1 - The threats weren't taken seriously and Avid Life Media considered them a hoax.

Recommendation #1 - Take cyber threats seriously and address Cybersecurity as part of your overall Enterprise Risk Management program. Sensitive data is a prime target of rogue actors, due to its value and the damage its compromise causes to state actors, organisations and individuals.

Lesson #2 - Avid Life Media had no idea where sensitive data was stored within its Data and IT ecosystem and hence was unable to purge it from its systems.

Recommendation #2 - This is a very serious Data Governance failure on their part. Any organisation that deals with sensitive data has a responsibility to properly manage and secure it. Organisations must do the following as standard governance practice:

- Implement a Data Portfolio Management strategy: You can't secure data, if you don't know that you own it and where it is located within your complex data ecosystem. Therefore, organisations have to maintain an inventory of the different types of personal, financial, bio-metric, and banking data they possess and the sensitivity associated with each type (e.g. Regulated, Confidential or Public Data). Data Governance and Metadata Management tools support this capability,
- Document access control policies related to each type of sensitive data - who can access it, under what circumstances and ensure that all systems implement them. Regularly review policies, to ensure that they are current and conduct automated internal audits to verify compliance,
- Document the location of all sensitive data within its IT and Data ecosystem, regardless of whether the data resides within its firewall or is stored in the cloud. Data Discovery tools can be used to facilitate the identification of sensitive data and Metadata Management systems can be used to store the results, and
- Implement automated audit and reporting capability that can monitor access to sensitive data and identify unusual behaviour. This requires close co-ordination between the Data Management, IT, and the Information Security teams. Database and server log monitoring tools combined with sophisticated analytics, can be used for this.

Lesson #3 - Avid Life Media was led to believe by its internal staff and consultants that sensitive data was secure.

Recommendation #3 - An organisation's IT and Data ecosystem is like a very large palace with hundreds of doors. All it takes a thief to get into the palace and steal the crown jewels, is a single door that is left unlocked accidentally or purposely, by a staff member or third party. Some organisations get complacent and drop their guard. It is naive for an organisation to believe that its systems can't be compromised and that its sensitive data is secure - regardless of how robust it thinks its defences are.

All a hacker needs is access to a single open port, inside information from an insider that has turned rogue or information to unlock systems (e.g. Passwords, VPN tokens, etc.) that can be acquired on the Dark Web. Being vigilant, proactively identifying unusual activity that is targeted toward sensitive data and addressing it appropriately, is the best solution.

Lesson #4 - The firm was operating in departmental silos.

Recommendation #4 - Organisations can't afford to keep operating in silos. Transparency, collaboration and constant communication is required between internal departments (e.g. Chief Information Security Office, Chief Privacy Office, Chief Information Office, Chief Data Office, Regulatory Compliance, Risk Management, etc.) and external parties (e.g. Vendors, Competitors, Intelligence Agencies, etc.), to share information, discuss risk mitigation strategies and apply the necessary checks and balances. The IT and Data ecosystem is constantly evolving, which creates gaps and vulnerabilities.

Organisations have to take the following six multi-pronged approaches to address such risks -

- Implement strong data governance in conjunction with their IT governance and Information Security processes,
- Ensure compliance with data related policies and procedures,
- Proactively monitor activity and flag abnormal behaviour, especially as it relates to sensitive data. Insider threats are becoming a major issue lately and are harder to isolate,
- Secure sensitive data using encryption and other techniques,
- Integrate Information Security with Data Governance activities and conduct spot audits, to identify weaknesses, and
- Share notes and co-ordinate activities with other organisations and intelligence agencies, and take preventive measures.

Sensitive data is flowing between servers, desktop computers, mobile devices and all over the ether, between third parties. Most of the transmission and handshakes are based on trust. Therefore, we are as secure as the weakest link in this Information Supply Chain. Unfortunately, there are no "Silver Bullets". The best way for organisations and individuals to mitigate risks, is to learn from previous attacks and implement the recommendations I've outlined above.

Jay Zaidi is Founder and Managing Partner of AlyData - Big Data and Cyber Security Experts.

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John Keys cleared over text message

New Zealand's Chief Archivist Marilyn Little has released the report of her review into Prime Minister John Key's record-keeping practices in regard to text messages. The decision to carry out the review arose from a request by a Greens MP in November last year, to investigate whether the deletion of text messages constituted a breach of the Public Records Act 2005.

The review examined the adequacy of record-keeping advice, processes and systems in place to support the Prime Minister (and thereby all other Ministers). Relevant agencies including the Department of Prime Minister and Cabinet and Ministerial and Secretariat Services were interviewed.

The review highlighted that text messages can be public records and that Ministers are considered public offices under the Act. The review also found that the Prime Minister was not advised of his full responsibilities under the Public Records Act and that the advice and support provided to all Ministers was inadequate.

It found that "Despite the Prime Minister not being made fully aware of his specific responsibilities under the Act, or the use of relevant Disposal Authorities, the Prime Minister's management of his text messages can be viewed as pragmatic."

"While this may occur for security reasons rather than record-keeping purposes, the Prime Minister's current approach does not indicate any wilful or negligent disposal of records without authority. Most text messages are transitory which means their content is already authorised for disposal under GDA 7. The Prime Minister's practice therefore appears likely to be compliant with the Act in relation to most text messages," the report concludes

The Prime Minister outlined his current approach for managing text messages as: "I receive a large volume of text messages on my cellphone which I routinely delete for security purposes. It is not my practice to conduct substantive ministerial business by text message.

"The vast bulk of text messages I receive in my ministerial capacity relate to minor administrative matters such as transportation arrangements, diary rescheduling or drawing my attention to an email I may need to read. Occasionally I may ask officials for information which is then provided to me usually in the form of an email or briefing note – the content of which is retained for the public record. I do not use a private cellphone."

The Chief Archivist's report concluded with the following recommendations how text messages should be managed

"Compliance with the Act requires that a text message created or received by a Minister in his or her official capacity is treated as a public record. If the message's content is facilitative, transitory and/or of short-term value, then it may be deleted under an existing disposal authority. However, if the content of the message requires action or is potentially of longer-term value and needs to be retained, then its content should be transferred to the Minister's support staff to manage.

"In summary Ministers should:

- identify text messages created or received that contain information that is a public record, and
- assess the value of the information, and
- delete a text message if the information contained in it is only facilitative, transitory and/or short-term value (under GDA 7 or DA 214), or transfer the information to staff responsible for providing recordkeeping support."

NZ Environment Ministry takes on cloud ECM

Aiming to transform into paperless organisation by 2020, New Zealand's Ministry for the Environment (MfE) is deploying OpenText Enterprise Content Management-as-a-Service. Based in Wellington, MfE is the government's principal adviser on policies, laws and issues affecting the environment.

With information being mission-critical to the organisation's overall functionality, MfE was faced with the increasing need to further secure and safeguard critical knowledge and data acquired over the years. The Enterprise Content Management-as-a-Service (ECMaaS) solution was deployed by OpenText Global Services and its partner Techtonics, and supported by Datacom from an infrastructural standpoint, with the aim of augmenting knowledge management within the Ministry via a robust document support system.

Neil Hurley, Director, IT and Project Management Office at MfE, said, "The project was primarily commissioned because of the need to safe keep our information, but presented an opportunity for us to unlock the value of our information, a key strategic asset. OpenText's ECMaaS enables the Ministry to have in place a next-generation, cloud-based knowledge management system."

The procurement process involved evaluating the trio of vendors on the New Zealand government's cloud-based enterprise content management-as-a-service panel, to assess if they met the Ministry's stringent requirements. The all-of-government ECMaaS panel is managed by the Department of Internal affairs on behalf of all government agencies. Paramount to MfE's choice of OpenText was the high usability offered.

In order to ensure that the project delivered the knowledge management improvements the Ministry required, change management was key. As part of the deployment process, an internal naming campaign was organised to get staff involved in the project and instil business ownership in the product. The initiative saw a large number of employees participating in naming the new system, which was eventually coined 'Te Puna' – or 'the source' in the Maori language.

"The initial implementation process spanned four months and was definitely smooth from a technical implementation perspective. In fact, user adoption rates are very high in the early stages," said Hurley.

"Our investment in time to get our employees' ready for the new system, has made it easy to motivate usage and get everyone up to speed on how to use the new system. The OpenText solution was extremely scalable and user-friendly - having scored high in terms of usability amongst staff during evaluation."

OpenText's ECMaaS manages the flow of information from capture through to archiving and disposition. The solution was able to facilitate an agile information governance strategy for MfE, thereby reducing risk and mitigating the cost of growing volumes of information on the organisation.

Longer term, MfE is planning to build on the OpenText foundations it has in place. In particular, the Ministry is looking at migrating additional content in to the solution to build a single knowledge repository, further enhancing workflow processes, as well as leveraging the solution to collaborate and exchange information securely with key external stakeholders.

Another long-term aim is to digitise as much of its business processes as possible, to become progressively less reliant on paper. In turn, staff can enjoy greater access to information and the ability to retrieve critical information remotely in an accelerated manner, enabling them to tap on knowledge in novel ways.

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Uni moving 6000 staff away from Google

By Robert Ek

Macquarie University is migrating staff email away from Gmail to Office 365, due to concerns about data sovereignty.

The university plans for all staff email and calendars to be migrated to Office 365 by the end of this year.

The University only did the Gmail rollout several years ago.

The university's CIO Mary Davies told staff that the institution had been forced to look for an alternative to its Gmail platform after Google decided to shift the organisation's data out of the EU and into the US. Macquarie had no choice in the matter.

Macquarie University signed with Google in 2010 to migrate its 6,000 staff off Novell GroupWise (remember this technology?) and onto Gmail. Its students had moved to Gmail in late 2007.

One of the major reasons it signed with Google was that the company promised the data would be hosted in the EU.

Macquarie had initially raised concerns that its data would be subject to the US Patriot Act and Digital Millennium Copyright Act if hosted in America. Originally the university had rejected Microsoft as an option at the time for being too expensive. Microsoft pricing is very competitive today.

Davies said as a result of Google's decision to shift Macquarie into the US, the university had been forced to look at other options and had subsequently decided to go with Microsoft and Office 365 hosted locally.

Microsoft has opened two Australian data centres late last year and has been hosting its cloud services from Sydney and Victoria since.

Davies said the new Office 365 solution had been tested with 90 staff for the last six months. Staff will be allowed to retain their Google accounts but will no longer be able to use email and calendaring services for work purposes.

The IT team will review the use of Google Apps next year based on staff and student requirements, Davies said.

Staff will be given access to Outlook, OneDrive, Skype for Business and Office 2013.

Data sovereignty is an issue for a lot of Australian organisations such as government, education, medical, legal, accounting etc. Microsoft made a very good move for the local market having data centres located here, in Australia.

The other issue that this story brings to light is that you may sign up for a service only to have it changed by the vendor in the future. This then costs your organisation a great deal of budget to get back to a platform where you are comfortable and able to manage compliance and the like.

SaaS (Software as a Services) is by far the largest sector (approximately 85%) and will continue to be, of the Cloud as we know it today. Office 365 and Google Docs are examples of SaaS offerings.

Our clients are generally what is know as 'Hybrid Cloud' - servers on premise with a range of XaaS services.

Aside: Price of bandwidth is coming down. The market for supplying broadband is consolidating into 4 major players. Telstra, the TPG group (iiNet, AAPT, Pipe Networks), Optus, and finally Vocus (Amcom and now talking with M2 (Dodo etc.). It will get to be more competitive which is good for Australia. Plus the NBN roll out continues in its many formats.

Robert Ek is Managing Director of Go Systems, a Sydney-based IT service provider. Email: robert@gosystems.com.au

The future of business process is the future of ECM

By Jeff O'Neill

As more and more companies realize they have to pay greater attention to information management, security and compliance of data, the realm of ECM is poised for exponential growth.

Legacy paper-based systems provide limited value and clearly do not meet the stringent security requirements necessary in today's workplace.

As ECM continues to develop, users are looking for solutions beyond the traditional offerings of scanning, tracking, converting and storing. Users will demand a fluid interactive experience with access via mobile and cloud to keep pace with the speed required to compete in today's economy.

The access of data in meaningful ways can be a competitive advantage across multiple business domains such as sales, marketing and finance.

Most companies adopted ECM for one of two reasons. The first was compliance. Industries including healthcare and legal are bound by a raft of restrictions and regulations from record management and archiving to information governance.

ECM bundles solutions to all of those requirements so that companies can achieve compliance while enhancing security. The second reason was corporate functionality. Thanks to ECM, a company's growing document workload could be easily captured and distributed in any form, from print to electronic.

Employees could move information faster, whether it was converting file formats, automatically routing emails or basic scan and share. Collaboration, regardless of location, was facilitated.

Now, a third reason is entering the mix: business process management. In other words, ECM is becoming integral to the entire business process, whether it is customer relationship management, supply chain management or enterprise resource planning. This is an exciting step forward.

Building ECM to handle a company's entire business process connects all of the individual applications together. This, in turn, creates a holistic integration that goes deep into the user experience.

This "deep content" approach drills down to give us insight into workflow and processes, and even lines of business. Overlaying ECM across the entire business model allows integration at not only a user level, but also at the roles and permissions levels.

A deep dive to map the entire spectrum of the enterprise will shed light on how lines of business operate and connect, how the user experiences content and even what the very nature of that content is.

This, in turn, allows a company to take stock of its entire organization and make adjustments necessary to ensure survival, growth and prosperity.

Jeff O'Neill is an Account Executive at Konica Minolta.

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CHIEF DATA OFFICER

The new corporate rock star?

The is no better measure of the growing prominence of the Chief Data Officer role than the emergence of business conferences dedicated to discussing its impact. At the 2015 CDO Forum in Melbourne, Katrina Read, Analytics Client Architect Leader for IBM Asia Pacific presented a session entitled: *Chief Data Officer - The Next Corporate Rock Star.* Intrigued by the possible conjunction of spandex, extended guitar solos and data analytics, IDM asked Katrina to expand on her thesis.

IDM: The Wikipedia definition tells us the CDO is "responsible for enterprise-wide governance and utilization of information as an asset via data processing, analysis, data mining, information trading and other means." What your definition is and where you see the role?

KR: The interesting thing about the role of the chief data officer is that every organisation is defining it differently. Often it's defined based on the organisation's current level of maturity when it comes to data analytics and where they have their biggest challenges or opportunities. As an example, some organisations define it more as an IT focused role and other organisations go to the other extreme where it's almost hand-in-hand with line of business. From what we've seen, certainly working with organisations around the world, the chief data officers that get the biggest impact within an organisation are actually the ones that sit between IT and line of business - the ones that bring together the knowledge and the understanding of the data and technology that are out in the marketplace today, linking it back to the business vision. The chief data officer of today aligns IT to the corporate strategy and really focuses on business outcomes. Where we do see chief data officers that fall into this particular category, we see a significant impact of better use of analytics across the whole organisation.

IDM: The role has been described as "a person in charge of data policies and procedures who can take on data monetisation efforts." Isn't that just a CIO with a business hat on?

KR: The role is much broader than IT simply because it's not just about keeping things up and running; it's really about understanding how you can turn data into a strategic asset. Data can be a source of competitive advantage and the only way you're going to achieve that is if you have someone that represents the value that data can bring so that it's part of each and every business decision. When a business needs to make strategic decisions about how to increase revenue, maximise resources, or increase productivity, having an expert that can come to the table with valuable insight drawn from company information will have a positive impact on those decisions. These types of decisions are grounded in fact and insight.

The chief data officer role can also be considered as an evangelist

role. This person will often have a comprehensive view across the whole business and is someone that understands what the business is trying to achieve, making sure that data is being managed and governed and secured in a way that can deliver on the vision.

IDM: That sort person is going to be popular, but do you really think that they will be as popular as rock stars?

KR: A chief data officer who focuses on successfully bridging the gap between data technology and business strategy and does it well can have a significant impact on the business. This means they can achieve cult status and a bit of a following – they are the new corporate rock star. Historically, technology has often seen as a cost. The chief data officer is really challenging this perception and showing how you can get return on investment. They are helping businesses understand that when you leverage data and insight correctly you can have a significant impact.

IDM: Gartner came out with a pretty confident prediction that 25 percent of all large global organisations will have appointed a CDO by 2015. Has this happened?

KR: The uptake is certainly underway. Based on our experience, we know that the role of the chief data officer comes under different titles - whether its head of data and analytics or head of strategy and analytics. This role of a data leader or an evangelist around the data analytic space does vary a little bit and it doesn't always come with the official title.

IDM: A quick LinkedIn search comes up with only 12 in Australia and three in New Zealand. Do you think that's because we're lagging behind or because they've got different names?

KR: This is still a new area for the Australian market, as they are often not necessarily carrying the title and sitting at the C-Suite. But we are seeing more data analytics leaders and Heads of strategy and analytics within Australian businesses. They are currently flying under the radar - possibly reporting into marketing or into a line of business – but they are there. We know that Australian organisations are starting to recognise and value the expertise needed within the business to provide a comprehensive view of data.

IDM: What are the skills and capabilities and experiences you think a CDO should have?

KR: Every organisation and industry is uniquely different, meaning each chief data office role is uniquely different. People in these types of roles understand the data and how to code, as well as having knowledge of the business and how insight is applied. They make data a priority and a strategic asset for the business, rather than it just being an IT issue. This skill set combination is currently really hard to find. Companies like IBM collaborating with a number of universities including University of Melbourne and Deakin University to help build those skills, which is a significant skills gap in the industry. The reality of business today means huge amounts of data are being generated across complex systems, where there are multiple touch points and platforms that hold all of the data. The challenge for the chief data officer is to draw out the insight from this information across these systems and bring it to business users, in a way that they know where to get access to the information and what they can get access to. It's all about making data a priority, developing the skills within your organisation to exploit that opportunity and freeing the data to unlock its potential to support business decisions.

IDM: There are many organisations that are dealing with lots of data but many see it as a cost rather than seeing themselves as opportunity to drive themselves forward based on utilising that data. Does it require a whole philosophical change to see an organisation able to utilise this new role?

KR: Tackling data used to be a time consuming process that involved completing comprehensive requirement lists, designing a data warehouse and implementing the system – sometimes this process would take between 18-24 months. These days we recommend to our clients to start off with the business outcome they want to achieve, then build a strategic data roadmap around that use case, picking off the top two projects to complete in a six to 12 week timeframe. These agile, pilot programs will ensure short time to value providing a quicker return on investment and ensuring the business is benefitting from the beginning.

IDM: Many of the challenges you highlight sound like the typical problems tackled by initiatives in master data management and data warehousing. What is different today and how would a CDO approach these problems?

KR: I don't think the issues are necessarily different, I think they've just evolved along with the evolution in the way that we create and generate data. We are dealing with more unstructured data, which includes social media, but also includes things like call centre records or maintenance logs. Organisations have had a lot of unstructured data in their businesses for years – they may have struggled to understand and analyse it. It's really understanding how we can tap into the insight in unstructured data so that we're making better decisions based on a complete picture; a complete understanding. The challenge in today's business environment is we're not just looking at how we report on numbers or how the operations team works, we're actually trying to predict and look into the future as to what might happen. If you want to compete in an open market you really need to have a better understanding of the customer, of where the business is headed and of what demand is going to be coming down the track. It's no longer enough to understand your business today. Successful businesses use data to map out the future of their organisation.

IDM: Does the CDO role encompass issues of managing and analysing unstructured data, which traditionally has come under the province of people worried about enterprise regularity and governance issues.?

KR: There's kind of two parts to it when it comes to unstructured data. One of them is definitely around regulatory and often organisations will have like a chief risk officer,

The chief data officer's role isn't restricted to a specific type of data. Regulatory compliance is a part of that but not the whole story. It's about understanding how one can leverage information to derive insight and using that information to make decisions - whether that information is stored in a traditional database or a flat file on a file server.

IDM: Couldn't you just replace the CDO job title with big data officer, or BDO?

KR: The real value that information presents to a business is actually in the analytics and the insight, not just the data. Understanding how to leverage technologies that can support, manage, govern and secure big data is absolutely critical to that. Its two sides of the coin. Managing, governing, maintaining and securing data in a cost efficient manner is critical. On the other hand, if you're not deriving insight from the data and then putting those insights in the hands of business users, then the value and impact on business decisions is lost. The ultimate goal for this role within an organisation is to drive better business outcomes and no matter what title this role has, this will always be the focus.

Katrina Read, Analytics Client Architect Leader for IBM Asia Pacific

CMIO pushes frontiers of digital health

The role of chief medical information officer (CMIO) s is a relatively new job in the healthcare industry, although one that is becoming increasingly important since the acceleration of government efforts to establish a national record-keeping system for health records. To understand where the role fits in the eHealth landscape, IDM spoke with Dr Ronnie Ptasznik, appointed CMIO at Victoria's Monash Health in 2015. in addition to his duties as CMIO and an Associate Professor at Monash University, Dr Ptasznik maintains a senior clinical role as Deputy Director of Monash Health Diagnostic Imaging over its five campuses.

Monash Health is Victoria's largest Health Network. The state-owned public health operator provides services to 1.3 million people living across Melbourne's outer south-eastern suburbs. Late last year, Monash Health was given $A40 million in funding by the Victorian state government to start its implementation of e-records and associated electronic medications management system and has embarked on a plan to implement a HIMMS level 6+ EMR in the near future (The HIMMS model identifies the levels of electronic medical record (EMR) capabilities ranging up to a paperless EMR environment). As CMIO, Dr Ptasznik is the Clinical Lead for that project, Chairman of the Clinical Informatics Committee and sits on the IT investment Committee. He is responsible for strategic decisions on EMR configuration and Clinical Engagement.

IDM: Ronnie, can you please give a brief overview of your role as CMIO?

RP: Many EMR projects have failed internationally and the literature clearly indicates that in order to be successful, the EMR project has to be clinically led and the CMIO is the Clinical Leader of the EMR project. EMR projects that have been run as IT projects without clinical or strong executive support have invariably failed. The most important key to success is clinical engagement and this involves far more than educating the clinicians to use the EMR or even getting them excited about it, it depends on getting their involvement from the earliest stage and in all stages going forward. Clinicians must feel that they have had a role in the selection, configuration and ongoing operation of the EMR. Ensuring that this occurs is the principal role of the CMIO. In addition, the CMIO is as an interlocutor, a formally recognized arbiter in EMR policy issues.

Examples of issues that might arise might include order set and clinical decision support (CDS) design, which alerts, how many, and the design of computerized physician order entry. (CPOE).

I firmly believe that the CMIO needs to be an active senior clinician in the Hospital. The CMIO requires the respect required to seek consultation and compromise from other senior clinicians. It would be difficult to argue for compromise if one is not going to use the system configuration one is advocating for.

To achieve the required clinical KPIs, the CMIO must have the required gravitas, influence and decision making ability within the EMR project. At Monash Health, the CMIO is a full member of the EMR steering committee which is chaired by the Chief executive, Ms. Shelly Park. The CMIO also sits on the IT investment committee, and chairs the clinical Informatics committee and the EMR clinical council. The CMIO, together with the chief nursing informatics officer (CNIO) and EMR Program Director form the EMR executive team which reports to the CMO, Professor Erwin Loh.

IDM: How would you categorize your current roles and responsibilities?

RP: Firstly, clinical engagement, which is far more than getting the medical staff enthused and willing to use the system. There are 2200 doctors employed at Monash Health and many still think that an EMR simply represents transition to a paperless system. The engagement process commences with education to explain that an EMR changes everything in both the patient and doctor's experience of the patient journey. The result is an increase in the quality and safety of the delivery of patient care.

As chair of the Clinical Informatics Committee (CIC) it is my role to evaluate the proposed introduction of any new or the upgrade of any existing Health IT product. Many proposed products are best-of-breed (BOB) systems. In many cases the BOB may have superior functionality in a particular field when compared to an Integrated EMR but the overall clinical advantage to the patient and Monash Health may be inferior. The CIC evaluates the clinical need for such a system, the degree of duplication, the clinical risks of maintaining integration, the desirability of the vendor and the overall clinical advantage to Monash Health and advises ITIC accordingly.

In the event the BOB proposal is declined it is the role of the CMIO to explain to the clinicians involved the overall benefits to Monash Health, their patient and themselves by using the functionality of the EMR rather than a BOB. To date, most clinical units have accepted the clear advantages of an integrated EMR and have become enthusiastic backers of the new system.

To be successful an EMR implementation requires clinical input in the design and configuration of the system. This requires a series of subcommittees, each tasked with foreseeing and designing a part of every possible component of a patient's journey for a myriad of medical conditions. For example: Clinical documentation, order sets, alerts, research, user experience, CPOE committees all need to be set up, given tasks and overseen. This is the responsibility of the CMIO. The subcommittees report to the EMR clinical council which is chaired by the CMIO.

In an era of limited resources clinical priorities need to be set in terms of EMR functionality and which software modules require to be introduced and in what order. This is also a major role of the Clinical Council.

During Implementation the change management process for the clinicians will need to be designed and overseen by the CMIO. Monash Health is a clinical school of Monash University and is a centre of major research including the Monash Health Translational Research Precinct. The EMR promises to transform clinical research by unlocking the rich data held within its Clinical Data Repository. The CMIO works with Monash Health's research partners to enable this potential to be realised.

IDM: You began your career in Medicine specialising in radiology, how did you veer toward informatics and health IT?

RP: I didn't so much veer as receive a gentle nudge. Radiology, is, by its very nature, a specialty that represents fusion between technology and Medicine. Radiologists internationally have been at the forefront in the development of Informatics and the standards used every day to communicate between systems such as HL7 and DICOM. I think it was perceived that I ran a reasonable clinical implementation of a RIS PACS project and I was encouraged to "look into" the EMR field. I realized very quickly that here was the potential to benefit far more patients in a far shorter period of time than I ever could reporting Radiology cases.

The advantage of Radiology is that it is so general in its training. We are familiar with most pathology encountered in a modern teaching hospital, from Paediatrics to Geriatrics and contribute heavily to clinical research. However, as I have explained, it is important for a CMIO to maintain clinical relevance so my appointment is 50% Informatics and 50% Radiology.

"At the moment, the situation at Monash Health is that on ward rounds, residents may need to log into up to 11 different clinical systems that do not communicate with each other and require different passwords. These are the classic ehealth silos ... and make it impossible to use the clinical data for alerts or clinical decision support." - Dr Ronnie Ptasznik, Monash Health

IDM: You were appointed Monash Health's first CMIO in January 2015. What kind of challenges did that present?

RP: I was lucky in that I had been performing the role in an informal capacity for about two years prior and was already a fair way along the learning curve. At the very beginning, however, I was overwhelmed and didn't know where to start. Fortunately, I identified very early on a mentor with vast experience in the field, Professor Michael Fossel in the United States, who guided me in the early days as I gained expertise in the field.

It was Michael, in fact, that introduced me to Earl Blessing our current EMR Project Director at Monash Health. Normally, finding an experienced PD would be a massive challenge but Michael introduced Earl as the best EMR PD he had ever seen and we have not been disappointed. Personally, as a radiologist, an additional challenge was familiarising myself with the situation on the wards again as I had to reacquaint myself with ward rounds, nursing stations, and Medication safety.

IDM: How do the roles of CMIO and CIO co-exist?

RP: They are not competitive roles. Monash Health is fortunate in having an experienced CIO who understands that an EMR needs to be a clinically led project. The CIO's role is to ensure that Monash Health has the appropriate Infrastructure to provide a reliable and fast EMR system. He serves with me on the EMR steering committee and ITIC and employs his commercial experience in dealing with Vendors and the Health Department.

He is not involved in any of the clinical processes outlined above. There is not, nor should there be, conflict.

IDM: As CMIO what are your top priorities at the moment?

RP: It is a relatively quiet time in the life of the project for the CMIO. The EMR team has just completed the business case and now is busying itself with various tender and probity documents. As CMIO, I am concerning myself in organising the EMR clinical subcommittees, appointing a chairperson and terms of reference for each one. We are going through a functional analysis of several BOB outstanding projects in order to determine if they should proceed. I am working on a project attempting to get as much of our patient data into the PCEHR as possible, even before the implementation of the EMR. Soon I will be gathering the care management plans and using them for a basis in formulating order sets.

IDM: A recent Frost & Sullivan report notes that "Fragmentation in the healthcare system prevents information that has been collected from being managed, shared and used effectively." How is Monash Health planning to deliver more effective information management?

RP: This is precisely the reason we have opted for an integrated EMR where most modules, as far as possible are sourced from a single vendor. The core of an EMR is the clinical data repository (CDR) which, by definition contains all the information pertinent to each patient. A single vendor integrated structure with CDR obviates the need for multiple expensive interfaces with third party vendors that do not allow comprehensive sharing of data, the major cause of fragmentation. Any query of the EMR data base will query the entire CDR.

IDM: The 7-stage HIMMS model for meaningful use of certified electronic health record (EHR) technology in the US is driving adoption through a direct link to federal health funding. Despite the fact this linkage does not occur in Australia, it is a benchmark that is now eagerly sought by Australian healthcare providers, why is that?

RP: That is a very good question. The HIMSS 7 point scale is not interpretable to most clinicians and while it does indicate what technological functionality exists it does not say anything to an EMR layperson about the impact on clinical practice of any particular level. It does provide a rough benchmark of EMR functionality for hospital administrators.

While Monash Health hopes to achieve at least HIMSS level 6 functionality we have not chosen the modules that will be pres-

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Monash Health CMIO

(From Previous Page)

ent at "go live" based on any scale but rather the rational clinical needs of the Health service as determined by the EMR clinical council. What is most important is that there be no broken workflows, causing a transition from digital to paper, in the areas that we do have EMR functionality and therefore minimal clinical risk. Broken workflows have been a major cause of clinician dissatisfaction and failed EMR implementation elsewhere.

IDM: HIMMS Stage 6 Certification means that all paper medical records documents must be scanned and made available through the EMR. Are you planning to utilise OCR technology to move beyond making the scanned paper records available as image to implement digital workflows?

RP: No hospital will ever be paperless. There will always be outside documents, specialist letters, for instance, that will need to be scanned into the EMR. It would be useful in the future if these documents were searchable by OCR but the vast majority of the patient data will reside in the CDR and therefore OCR technology is not as imperative as it would be with a BOB system.

IDM: Stage 6 Certification requires all Physician documentation is done in the EMR using structured online templates, will this completely eliminated use of paper note taking at Monash Health?

RP: No. I do not believe that structured on -line templates can ever totally replace a traditional medical history in all possible clinical circumstances. Free text will always be required to some degree. In fact, the unreasonable imposition of templates upon medical staff is one of the most important causes of dissatisfaction and subsequent EMR failure. However, we will certainly attempt to design templates for our most common clinical scenarios especially when language problems may be present. The templates will be designed and approved by subcommittees of the EMR clinical council and therefore should have widespread clinical acceptance.

IDM: Healthcare in Australia has traditionally been seen as a slow adopter of Electronic Document and Records Management Systems (EDRMS), widely used in Financial Services, Insurance and Government. Paper-based workflow and archiving manual data entry are still widespread. Has Monash Health adopted technologies such as EDRMS?

RP: Monash Health was the first health service in Victoria to introduce scanned medical records, about 10 years ago. As noted above, reliance on this system will diminish with introduction of the EMR but some scanned documents will always be required.

IDM: Is Monash Health using data analytics now – any particular departments or areas of care that have responded easily to analytics? Can you point to specific improvements that have been made through the support of analytics (operational, clinical, financial, etc.)? Or will that await Stage 7 when data warehousing is being used?

RP: Monash Health has a data warehouse already and the data contained is already being used for operational, clinical and financial analysis. In Radiology, for instance, we can use the data warehouse to breakdown our monthly examinations into modality type, financial class, and subspecialty.

IDM: How important do you see the broader uptake of the PCEHR (Personally Controlled Electronic Health Record) to eHealth in Australia?

RP: I have been a clinical lead at NEHTA and the PCEHR for over three years and have recently been appointed to the NEHTA board of clinical governance. The PCEHR will always be of limited use in that as it is personally controlled, a clinician cannot rely upon it to be entirely complete. However, once the opt out system is delivered the vast majority of Australian citizens will have a unique patient identifier which will enable Health providers such as Monash Health , in the short term, to post recent discharge summaries, discharge medication, specialist letters , Radiology and Pathology reports into the PCEHR. This should enable a more rapid exchange of patient data between hospital and primary care provider than previously thought possible.

I also believe that in the not too distant future, URL links within Radiology reports will enable direct visualisation of relevant Radiology images obviating the need for expensive central image storage systems. There will be issues of patient privacy to be overcome but the potential clinical benefits and cost savings to the nation will be immense.

Time to treat email as documents, says harmon.ie

Harmon.ie wants to end the Outlook-SharePoint struggle by treating email as full-fledged documents rather than having emails managed separately from other business documents. The company claims the common use of two repositories (Microsoft Exchange and SharePoint) for storing connected business information creates a massive organisational burden when workers need to find relevant information quickly, especially for audit, discovery or compliance needs.

harmon.ie's new solution provides a single, central document repository using Microsoft SharePoint that allows organisations to treat emails as documents -- helping organizations meet key business objectives such as handling records, managing clients or cases, or retaining critical knowledge.

Email has come a long way since its original use as a method for quickly exchanging messages. Today, business emails are documents in every respect. Yet emails are still relegated to silos like Microsoft Exchange, while other documents such as proposals, contracts and product specifications are handled by traditional document management systems such as SharePoint.

"The reality of business in the digital age is that emails are easily lost in the shuffle of everyday life, but they really should be indistinguishable from traditional documents and frequently contain agreements, simple statements of work, requirements, contracts, etc. that are critical to doing business," said Joel Oleson, Director of Business Development at Konica Minolta Business Solutions.

"Having a solution that creates a single, easily searchable repository of traditional documents and emails is a powerful way for workers to add structure and streamline business without needing to work outside the tools they already use."

The new harmon.ie solution enables users to drag and drop emails from their Outlook window to a corporate SharePoint or Office 365 site, without ever leaving the email client. harmon.ie automatically converts email headers -- such as To, From, Subject and Received -- into SharePoint metadata. Classifying emails using metadata, harmon.ie ensures that each email can be found easily when needed. With the new solution, both emails and documents stored in SharePoint can also be discovered and shared on mobile devices.

https://harmon.ie/

Preventing Information Chaos with Unstructured Data

At the 2015 Chief Data Officer Summit in Melbourne, Veritas Senior Vice President Greg Muscarella presented a session on The Importance of Gaining Insight into Your Unstructured Data. Afterwards, IDM asked Greg to outline some of his recommendations. Greg leads Product Management and Engineering for the Veritas Information Intelligence team where he is responsible for products such as Data Insight, Information Map, Enterprise Vault and Enterprise Vault.cloud, and the eDiscovery Platform powered by Clearwell.

IDM: You highlight the fact that organisations need to analyse and manage unstructured data rather than just buying more storage. Is that still a message you think that people need to receive? Are there still some who don't understand the danger and the risk of unmanaged data?

GM: The No. 1 problem that most organizations have is that they have no idea what information they have, what it is worth, or why they keep it. But they will keep it. Forever. This is mainly because the information you do need to keep for regulatory or other reasons is all in the same pile with everything else, and unfortunately, since it all looks the exact same, the IT department, who's usually left trying to care for it, basically just freezes down and says, "Okay, I'm going to keep everything forever." The lack of differentiation amongst the data prevents managers from making decisions about their information and taking action.

In fact, if organizations are investing in data cleanup, they are spending the majority of their time focusing on Structured Data. With disciplines like Master Data Management and other data quality initiatives taking focus at organizations, there has been much more overall investment targeting the management of structured information…which is important…but it seems to have presented organisations with a bit of a gap in terms of what they have been doing with all of that Unstructured Data.

IDM: Whose job should it be to fix this?

GM: In many organizations, acquiring authorization to dispose of data — or even move data to less expensive storage — is nearly impossible. Within many organisations, no one claims ownership of unstructured data. So essentially IT is left holding the bag, because at the end of the day they run the systems that have to store all this stuff. But they don't get to decide whether it's being kept or not. Every organisation has a different take on things, but often the lawyers think that things need to be retained. In some companies they take a more harsh line and say, you know, "We need to dispose of stuff." But then you have lines of business or the business units which say that, "We want to hold onto this stuff forever," The IT guys would love to delete things or at least archive it, but they can't get the lawyers, and the lines of business and records managers and others to agree. That's where you end up in this default space of just retaining everything forever.

IDM: Do you think you'll ever be able to get rid of that line of thinking?

GM: I'm hopeful that if we can start to show that machine learning actually works, as we have in the legal space, we can apply those insights to retention. It's never going to be 100% accurate, but if can we get to the point where it passes the bar, then we will get to the point where we see organizations actually starting to delete things. In the short-term people may not be confident to delete data, but instead put it in an archive. And then maybe in two, three, five years' time, whatever it is, when no one's accessed it we might say, "Okay, are we ready yet? Can we hit the delete button now?" But the pain will continue to grow because even though storage that is priced on a per gig-basis is getting much, much cheaper, organizations will start requiring petabytes and petabytes of data, which is still a very significant cost. Gartner estimates that for every petabyte of information it costs $5 million a year just to keep it plugged in and available. We have customers with 50 petabytes and above, and that's growing at 20, 30, 40% per year, so costs go up dramatically from there.

IDM: The IP that you use within the eDiscovery Platform to do predictive coding, are you offering that as a product for automated classification of unstructured data?

GM: Right now we're using the learnings from the application of predictive coding within the eDiscovery Platform to apply it to data classification, or really what I would call retention management, the automated decision-making around retention. We're also working with the Stanford University Statistics Department to really develop our machine learning methodology to evaluate the algorithms we employ. So it's both the machine learning to make the decision as well as the statistics to see how well you're making decisions.

IDM: What are key steps to get more visibility into the problem?

GM: Firstly, it's critical to determine what you have by developing a holistic view of your organisation's storage repositories. Next, you need to ensure everybody knows the rules, so create a policy guide that summarizes all existing information policies. Ultimately, achieving positive outcomes within the first 90 days is critical, so prioritise low-hanging fruit: determine which projects will yield quick wins and develop a project plan (e.g., PST remediation, stale file clean-up).

Greg Muscarella, Veritas Senior V-P

Texthelp embraces ABBYY's Cloud OCR

Texthelp, a provider of software for the education sector, has incorporated ABBYY's Cloud-based OCR (optical character recognition) technology to perform text recognition in its Snapverter app for Google Apps for Education users.

Schools such as John Monash Science School (JMSS), Victoria's first specialist secondary school for science, mathematics, and associated technologies, use Google Apps for Education to build virtual lessons and support students in far-flung classrooms.

"ABBYY have been a trusted partner of Texthelp's for many years and we have used their OCR software development kits as core components of our products," says Martin McKay, Chief Technology Officer for Texthelp.

"We remain at the forefront of innovative software development, supporting students in learning to read, write, study and communicate with ease. Accordingly, we continuously seek out best-of-class technologies like ABBYY's Cloud OCR to help us bring first-rate products to market."

Snapverter is a new add-on tool for Texthelp's 'Read&Write for Google Chrome' software that transforms classroom papers and files into accessible PDF documents. Teachers can simply point a smartphone at any document and snap a picture with the camera. The content is then sent to ABBYY's cloud where the images are processed and converted into an accessible file for easy sharing with students within their Google Drive. This Cloud-to-Cloud solution recognises text from a variety of documents and files and then makes it accessible to be read aloud by Texthelp's extension for 'Read&Write for Google Chrome'.

Whether it is text from worksheets, handouts, book pages, photocopies, or other paper-based materials from the classroom - even photos, charts and diagrams - everything is included in the resulting PDF, which is stored in the user's Google Drive. Snapverter can also convert Bookshare digital publications in DAISY format to make an accessible EPUB file for reading aloud.

The ABBYY Cloud OCR SDK is a flexible and scalable on-line service for developers, system integrators and ISVs that allows them to easily enhance their applications by adding industry leading OCR, ICR and checkmark recognition functionalities. This platform-agnostic toolkit is based on ABBYY's OCR and PDF conversion technologies - the same core technology as used in ABBYY's FineReader products.

"We put great emphasis on developing the best document conversion technologies and work closely with leading organisations to tailor our products to best fit their needs," says Sven Diedrich, director of the technology licensing business unit at ABBYY Europe.

"We are honoured that a long-standing customer like Texthelp once again decided to integrate our technology in a new and innovative way by incorporating our Cloud OCR into their Snapverter product."

To obtain a free developer licence of ABBYY Cloud OCR SDK and test for yourself, please go to http://ocrsdk.com/ Schools and colleges with Read&Write for Google Chrome licences can try Snapverter for free by installing it from the Chrome Web Store.

eForm push at RMS NSW

The push towards digital government in Australia continues to gather momentum, with a recent request for tender from NSW Roads and Maritime Services (RMS) for a Digital Medical Assessment Form another example.

Looking to replace the traditional printed form, RMS is seeking proposals for the supply of a fully hosted and managed solution that will allow Medical Practitioners, such as GPs to submit RMS Medical Assessments without leaving their existing desktop software.This project provides a solution for the new RMS digital medical assessment form, and real time interactions between RMS systems and Medical Practitioner systems.

The final solution will be able to be filled out online by medical practitioners e.g. doctors, specialists, occupational therapists, optometrists, ophthalmologists etc. and electronically submitted to RMS.

Some requirements include:

• will validate the customer details against those held in RMS systems based on information entered by the medical practitioners;

• will present the questions and assessments that are specific to the customer being assessed by the medical practitioners;

• will provide context sensitive help to medical practitioners during the assessment.

What is Data Governance?

By Leon Young

Earlier this year I had the pleasure of interviewing Ram Kumar from IAG (Director of Enterprise Information Management) regarding Data Governance and its impact. As an Analytics and BI recruitment consultant I have noticed an increase in organisations who are realising the impact of data governance. However, there is also a lot of confusion as to what data governance actually entails from both organisations and specialists. With this in mind I thought I would find out from someone with far more experience than me.

LY: Given your background what was it that got you into the area of data governance

RK: I'm not a data manager or data governance specialist by profession but given my strong background in information technology what I quickly started to realise long time ago is that majority of the organisations have been focussing on technology, processes and the people to drive business outcomes with no focus on data.

What organisations fail to realise is that it is the data that brings technology, process and people together to drive business outcomes. This is why data is called the "lifeblood" of an organisation as it fuels people, processes and technology. Without data, you do not have a business. It is like blood in your body. Your blood fuels your body to operate.

An organisation might have the smartest and most efficient business processes, highly capable and smart staff and the best technology, but if the underlying data that touches people, process and technology is poor in terms of its quality and integrity, the outcome will be poor. So, for the last 17+ years I have been pushing for data driven organisation culture to maximise the generation of value out of data through effective and efficient governance of the lifecycle of data assets.

It has been a long hard battle as it is people that provide the challenge. Technology and processes are the easy bits.

LY: I notice in the industry that there seems to be a lot of confusion about data governance and what it entails. In your opinion what is data governance?

RK: Data is a core strategic asset of any organisation and should be governed like any other asset over the full lifecycle, from collection through to categorisation, storage, use and retention/destruction. Governance also includes management of privacy, security, data quality, master data and metadata management, and must be assessed over its full lifetime rather than in a bits and pieces fashion.

LY: Why do you think there is such confusion in the industry when it comes to data governance?

RK: The number one reason is that traditionally organisations never saw data as a strategic asset and, as a result, managing the data was seen as IT's role. IT is just a gatekeeper/custodian of data and does not own data. The latest phrase that is being used is "Data is the new oil". Well, it always has been it's just that organisations never realised it, as data was never considered as a strategic asset. This whole new movement to a data driven world (thanks to Big Data), is seeing organisations realise that data governance is critical. But many are confused about how to develop this capability.

This has resulted in the creation of the Chief Data Officer (CDO) role which is being given responsibility to help drive data

IAG Director of Enterprise Information Management, Ram Kumar.

driven business outcomes by working with CxOs such as Chief Analytics Officer, Chief Marketing Officer, Chief Digital Officer and the Chief Information Officer. Many ask the question why we need a CDO when we have a CIO? I would answer that most CIOs are busy doing IT related tasks only and never focus on the "I" in their title, the "Information". The person managing the information asset lifecycle is handling the "crown jewel" of an organisation which is different to managing the IT assets. I would prefer to describe a CIO's role as "Chief Information Technology Operations Officer".

Applying traditional data governance practices will be a challenge in this fast paced, high volume and volatile data environment as it could curb speed to market with new innovative products. How you get the right balance in terms of innovation and speed to market while providing controls through data governance is now a hot and interesting topic.

LY: In your experience, what are some of the common alignment issues most organisations face?

RK: The biggest problem is getting understanding and support from the top, i.e. the Board and CxOs, to treat data as a corporate/strategic asset. The value of data is often questioned. My answer to ask them to imagine the case of an insurance company generating a revenue of say $100 million in Gross Written Premium (GWP). If we just remove all the data from the organisation and leave it with just people, process and technology. What is the GWP of the company? $0.

The Board and senior executives must understand and treat data as a corporate strategic asset to maximise the value of data and take "ownership". If this happens, it will drive data driven culture across the organisation. You need in accountability and to lead from the front if you want to drive cultural change. Doing analytics with data to uncover insights does not mean an organisation is data driven.

Analytics is one component of the lifecycle of your information assets. An organisation managing its information asset lifecycle effectively and efficiently to generate "value" out of it to drive business outcomes is what I would call as a truly data driven organisation.

LY: How do you structure Data Quality Management within a Data Governance framework? What does a typical roadmap look like?

RK: Data Quality Management is fundamental to Data Governance Framework. Data Quality should be embedded as part of the data culture in an organisation. This means planning for data quality at the planning and conceptualisation stage of any initiative that involves data consumption rather than being an afterthought that would result in data cleansing activities. A typical roadmap would include skills, capabilities, tools, processes, monitoring and measurements/metrics. It is important that a dedicated team looks after data quality by working closely with business and IT.

LY: So far, we've talking about traditional structured data. What about newer, less-structured data such as social media feeds–doesn't that complicate the notion of "data quality"?

RK: This is becoming a major issue for organisations now. At least with internal data assets, an organisation could apply some key data quality measurements such as validity, trustworthiness, frequency, accuracy, etc. to measure the quality of data. But some of these measures are not applicable to data coming from external sources such as social media. Traditional approaches to data quality do not work in a big data type environment where we have to deal with huge volumes of data at high velocity and volatility. Moreover, advanced analytics methods use machine learning algorithms that are designed to handle certain percentage of noise in the data as they use the concepts of identifying "patterns" in data. But combining traditional data assets with the new external data assets (e.g. social media) to generate new data products makes the problem more interesting from data quality perspective. This is an exciting area that industry will be looking at in the future.

LY: On a local Australia level who do you think is doing data governance well?

RK: A couple of years ago, Deloitte surveyed the maturity of financial services organisations in Australia in managing their information assets. The result was 2.4 out of a maximum of 5. I am sure banks are be in a better position in data governance over other verticals due to the tight legal and regulatory requirements they have to comply with. My view is that this will change with legal and regulatory bodies starting to closely look into this whole area of data security and privacy. For example, the Australian Prudential and Regulations Authority (APRA) has release a Data Risk framework as a guideline for organisation to manage its data assets which looks at the lifecycle of data.

LY: It's one thing getting people to embrace this at the c level but what about the people at the lower level, what challenges do you think they will have?

RK: Traditionally in organisations, in any project of any size, the last thing people worry about or even think about is data management. Even if some funding is there for data management, in any budget situation, data management is the area that gets cut. Appropriate training programs should be implemented to raise the awareness of the importance of lifecycle of data management to all staff in an organisation. In one of our business divisions, we have included rewards program for staff capturing quality data which has been a huge success.

LY: What changes can we expect in the future?

RK: Today big data, maybe tomorrow it is massive data, but the principles of data management do not change as data is data irrespective of its size. What will change are agile and better data management principles. Data privacy is a subject that will be discussed a lot in the future. As organisations are streaming ahead to provide one to one personalised customer experiences through advanced analytics by combining different sources of data about a customer, the issue around privacy and ethics will become an important discussion point. Data management and effective use of data will also determine an organisation's success in implementing an effective digital transformation particularly when providing digital experiences to customers.

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GMCT drives ahead with digitisation

A major program is underway to digitise more than three million pages of paper records recording the history of more than 20 cemeteries dispersed across Melbourne stretching from Lilydale to Werribee. Created in March 2010 by amalgamating eight former cemetery trusts, the Greater Metropolitan Cemeteries Trust (GMCT) has begun the vast undertaking in tandem with a move to adopt the ELO electronic document and records management system.

Cemetery Trusts in general, and GMCT in particular, face a range of records management challenges.

Over the past 150 years practices have changed from storing records in bound leather volumes, site plans and other ledgers, to using complex digital Cemetery Management Systems, however, the GMCT still has ongoing needs to reference information within the historical documents. Cemetery records range from documenting the core business of managing burials as well as routine administrative functions.

Noela Bajjali, GMCT Manager Corporate Information and Records, said, "Over 150 years there have been frequent cemetery trust amalgamations and administrative changes. The provenance of our records is complex and to date largely unmapped.

"Relationships with our clients can typically span many decades and generations as we navigate ownership, use and maintenance of an interment or memorial location over time. Because of this, a very large percentage of our records are permanently valuable and our historical records remain in continuing use by our business for many, many years.

Many of our Historical records are in demand by members of the Public for projects such as family history and other historical research.

"Record formats have changed over time and the condition of these records varies greatly. "

"Over the years, prior to GMCT's existence, business systems have been merged with varying levels of quality and success, creating some disconnect between our authoritative original records and our summary data," said Noela.

"Recordkeeping systems within the former Trusts have been inconsistent. The records have always been valued but we want to apply improved tools and methodologies to their management "In many sites history records that significant records have been lost to fire. Physically protecting the hard-copy records that we have was one of our very first priorities upon commencement of the GMCT The whereabouts of some significant records (like engineering specifications) are currently unknown, meaning we have to 'relearn' things at a potentially high cost."

Recognising the scale of the challenge, a 3-person Corporate Information team was engaged in 2013 to begin the work of aligning GMCT's recordkeeping practices to the Public Records Office of Victoria (PROV) Standards.

Although it receives no direct government funding the Trust is heavily regulated and must comply with a range of legislation including the Public Records Act, Freedom of Information, evidence act, Environmental legislation, relevant privacy legislation, and so forth.

GMCT operates as a not for profit organisation; with profits directed toward the perpetual maintenance of the cemeteries. Trustees are appointed by Government.

"A primary component of our Records Management strategy is working out what to do with the enormous volumes of historical records from all of the cemeteries that make up our Trust (18 in total across Melbourne's north, east and west). We need to preserve them and make them more available to the business and to future researchers," said Noela.

"We see digitisation of our legacy records as key to improved customer service, ensuring decisions can be based upon the full body of available evidence, regardless of location, ensuring greater accuracy and responsiveness and supporting greater mobility of our staff by giving secure access to high quality information from anywhere.

"We want to make historical records available to researchers without jeopardising the fragile originals and we want to be able to drill down into the content of things like our Trust records and Engineering case files via the facility of Optical Character Recognition (OCR)."

An initial survey of records held by the Trust found over three million pages of documentation would need to be scanned.

A three month digitisation pilot was undertaken in 2014 to accomplish a number of things, among them:

- Establish Metadata schemas
- Compare in-house versus outsourced digitisation for key record categories
- Explore outsourced hosting of digitised images
- Trial secure transfer of items for off-site scanning
- Estimate the costs of all approaches

"We wanted to make sure we do the job right the first time so that we can transfer scanned originals to the Public Records Office of Victoria (PROV) with a set of digital documents and metadata to facilitate use by researchers", said Noela.

Following the pilot, GMCT chose to continue with its existing supplier Grace Records Management for hosted digital image storage via the Grace Image Silo, as an interim solution, pending establishment of the ELO Electronic Document Management System (EDRMS).

For in-house scanning GMCT purchased a Kodak I3400 feed scanner with an A3 flatbed attachment to add to a fleet of Multi-function devices, and is trialling the use of indexing support software to simplify indexing and improve accuracy.

Evaluation of the digitisation of 54,000 images for the pilot established that many GMCT Records could not be cost-effectively digitised in-house due:

- to the size, format or fragile nature of the documents
- the need for high-end specialist equipment and
- the level of human resources required to accurately index the records

It found in-house scanning could be cost-effective if:

- Low preparation required
- No/easy removable binding
- Good quality paper suitable for feed-scanning
- Document size less than A3
- Simple metadata requirements

Some other findings include:

- Document preparation is critical to a good result and can take longer than the scanning.
- Outsourcing document preparation was not as effective as in-house preparation (but document preparation by providers got better as they learned about our records).
- In-house scanning needs a dedicated staff allocation to make the most of the equipment. It's not something to do in the non-existent 'spare time'.
- The provision of 'on-demand' retrieval services gives our users confidence that they can still access their records during the scanning process if needed.
- Indexing accuracy can be improved by extracts of data from our Cemetery Management Systems (automating some indexing or for verification).
- Application of OCR wherever possible improves search and retrieval enormously.

GMCT has recently completed an open tender to establish a digitisation procurement panel and is setting out on the digitisation program that it expects to complete over a 3-4 year period.

"We hope to partner with historical societies and other history-oriented organisations to start making key collections available for historical research," said Noela.

"I think it's fair to say that cemeteries are strongly rooted in history, as well as in the communities that they serve. Looking out across a cemetery with 1000 grave and memorial locations is really looking out at 1000 stories. 1000 histories of people who lived in and had an impact in our community."

This article is based on a presentation given at inForum 2015, the annual convention run by Records and Information Management Professionals Australasia (RIMPA).

Organisations Behind The Curve With Mobile

Enterprises are struggling when it comes to mobile ECM (enterprise content management) deployment, with more than three quarters of business executives surveyed in a new Association for Information and Image Management (AIIM) study saying they need to embrace mobile applications or be left behind. Just 10 percent of those surveyed have a smooth running BYOD program, while four in ten have zero mobile access to content, according to the AIIM study, Mobile and Cloud: accessing, capturing and processing content. However, ECM in the cloud deployment is more mature, with around three-quarters of respondents likely to be using some form of cloud ECM within the next four years; 26 percent are doing so already.

"Mobile is one of the biggest disruptive forces technology has seen and there is simply no debate – organisations have to put mobile at the core of their content strategies," said Doug Miles, AIIM's Chief Analyst.

"It has changed forever the way people work and collaborate, and workers need to access enterprise content via mobile. The good news is that many organizations have acknowledged this and mobile emerged as the biggest area for future ECM investment in our research."

Only 17 percent of respondents have a mobile information governance policy relevant to their business and just five percent employ anything that looks like a Chief Mobile Officer (CMOO). However, more than seven in 10 agree that there should be a single person with responsibility for mobile innovation. Of those that are using mobile ECM, 76 percent are seeing return on investment (ROI) within 18 months.

Some of the traditional barriers to ECM in the cloud are no longer as pronounced, with three-quarters of respondents believing that the security offered by their cloud provider is likely to be better or equal to their own. Organisations are also alive to the benefits of content in the cloud, with the two biggest operational benefits cited as effective collaboration, and more modern and flexible applications. One-third of cloud ECM users had noticed a cost reduction compared to on-premise.

"The benefits of both cloud and mobile ECM are well-documented. Many of the traditional perceived barriers to deployment are long gone and so now is the time for organisations to truly embrace cloud and mobile ECM," continued Miles.

"There is more content than ever before, with volumes growing daily in many enterprises. So using the best ways to manage that content, get the most value from it and empower workers to work more effectively just makes sense. ECM is changing and organizations need to be able to change with it."

Other key findings include:

- Just 10 percent of organisations have a firm 'no cloud' policy with regard to ECM.
- Individuals are more positive about moving ECM/DM content to the cloud than the organisations they work in - 87 percent compared to 42 percent.
- Thirty percent are planning a BYOD program or have one mid-rollout, while 20 percent have a BYOD program that is 'working OK but with some issues.'

A brighter future for HPRM-SharePoint integration

In this article, Kapish Consultant Jon Grundy explores HP's latest solution to regaining control of the growing records governance and compliance issues associated with snowballing SharePoint content in the enterprise.

SharePoint is ubiquitous and requires no introduction. Its breadth of functionality makes SharePoint a unique solution that is embedded in many organisations and is now a multi-billion dollar product for Microsoft.

According to Forrester's Q3 2014 Global SharePoint Usage Online Survey, Microsoft's drive to move SharePoint users to the cloud is working, but the complexity of existing on-premises implementations is gating a widespread cloud adoption for the time being. However, despite SharePoint's popularity, many implementations face a multitude of challenges: a growing governance and compliance headache; publishing content from other line-of-business applications; and, record capture workflow (or lack thereof). Integrating HP Records Manager and SharePoint solves these issues by providing a path to full compliance, simple document exposure and rule-based record capture.

Traditionally SharePoint and HP Records Manager are administered by separate teams in an organisation. Integration bridges this gap and unites these applications so that organisations can realise cost savings in enterprise storage, reduce SharePoint administration overheads, empower users to work more efficiently and independently, and provide peace of mind for records managers.

To understand the potential for integration inside your organisation, you first need to understand the problem it solves. SharePoint provides some clear advantages when it comes to project collaboration, document management and allowing users to work in accordance with how they want to work. Unfortunately this same set of features can also lead to chaotic content management, leaving organisations vulnerable to audits, FOI and Privacy Act requests among other issues.

Applying retention policies to content in SharePoint remains a massive headache for records managers. A NSW State Records assessment of SharePoint 2010 concluded that "There is no single way to design and configure SharePoint so that it facilitates good record-keeping."

Entire sites, lists and libraries can live on indefinitely, becoming lost and forgotten in run-away SharePoint environments. Despite the issue being well-known, attempts to pull existing and future data from SharePoint into HPRM often fail.

These issues were identified early in SharePoint's emergence by a forward-thinking team of developers from Unique World Software who first developed a 3rd party integration between SharePoint and TRIM Context called the TIPS SharePoint Connector in 2003. However TRIM/HPRM - SharePoint integration has proven difficult to implement, leaving many organisations hoping that the next version would resolve the problems. The team of TIPS developers now working inside HP showed a dogged persistence to re-build and improve. It was this "stand back up, brush yourself off and see what we can do better" attitude that has finally lead to the successful integration of today (see timeline).

The new Rules Based Management Screen in HP RM 8.2

The latest release of the HPRM SP Integration solves many of the challenges faced with previous iterations, introducing an impressive feature set for organisations looking to upgrade to SharePoint 2013/Online and HP Records Manager 8.2.

One of the biggest challenges in previous versions of the integration was the limited record management options and workflows (Lifetime Management Policies) that defined when and how an object in SharePoint would be captured into TRIM.

With HPRM 8.2, a new Rules-based management feature allows the use of IF/THEN conditions to define extremely granular rules and triggers on when content will be captured and how it is captured. This provides organisations with a hugely flexible toolset to ensure accurate governance and compliance of corporate records in SharePoint.

Technical difficulty in deploying the integration was a common experience, often requiring changes to the SharePoint server architecture or authentication configuration. The new App model displays a much smarter approach by Microsoft to delivering 3rd party solutions and HP has made quick use of this with the new HPRM SP Integration.

Kapish Web Grid

A primary function of a SharePoint intranet portal is the publication of policies, procedures, forms, templates and media within the business. In previous versions of the integration, this would be achieved using 'Record Exposure' into a pre-determined SharePoint library.

The results of the record exposure though were often inconsistent and troublesome, leading to large, flat lists of documents in a single library. Although sub-folder exposure provided some structure in HP TRIM 7.3, this functionality is not available in SharePoint 2013 and HPRM due to architecture changes.

To fill this gap, Kapish Web Grid is a solution to displaying and managing lists of documents from a HP TRIM or HP Records Manager dataset. It is also version independent, meaning that organisations that currently have incompatible SharePoint and TRIM/HPRM versions can still enable a publishing solution for their SharePoint intranet.

Kapish Web Grid allows the results of Saved Searches in HPRM to be published to any Web page, including SharePoint pages. Dynamic Saved Searches allow sets of documents, including drill-down containers to be exposed on SharePoint pages.

In previous versions of the SharePoint integration, links to

Jon Grundy is a highly experienced TRIM consultant with a diverse range of industry experience including nine years of HP TRIM/HP RM administration and support. Jon worked with both TOWER Software and HP before joining Kapish in December 2013.

Kapish Web Grid

Record Number	Title	File Type
D/13/201	TRIM7.33_WebClient_iPad	PDF
D/13/203	TRIM7.33_WebService	PDF
D/13/198	TRIM7.33_WCMContentAuthorGuide	PDF
D/13/199	TRIM7.33_WCMInstall	PDF
D/13/195	TRIM7.33_Spec	PDF
D/13/196	TRIM7.33_VEQ	PDF
D/13/197	TRIM7.33_WCMAdministratorGuide	PDF
D/13/193	TRIM7.33_SAPInstall	PDF

1 2 16 items in 2 pages

Kapish Web Grid in SharePoint showing Container Drill downs

individual TRIM documents could be manually created and inserted into sites and pages, however with the change in the integration model, these links will now be unusable. To provide a consistent experience and greater continuity throughout versions, Kapish Easy Link can deliver an organisation-wide URL linking system to all HP TRIM and HP Records Manager records and the ability to generate SharePoint compatible links for use on the intranet.

If your business is looking to streamline and simplify the record keeping and user experience within SharePoint, HPRM SP Integration has evolved to provide a capable and solid platform.

"Kapish are fortunate to have long standing experience and expertise with the integration from the days of TIPS, right through to the latest HPRM SP Integration App," said Jon-Paul Williams, Director Kapish Services Pty Ltd.

"Lessons learned over the last decade provide a solid foundation for all SharePoint Integration projects, backed by a thorough technical understanding of the integration history and how the integration has evolved to its current form."

To see more on what the integration can deliver and an in-depth presentation, including Web Grid and Easy Link functionality, Kapish will be holding a webinar during November. For more details, visit the Kapish Blog at http://kapish.com.au/blog/.

TRIM-SharePoint Integration History

2003-2004
Unique World Software developed 3rd party integration - TIPS SharePoint Connector.

2007
TOWER Software acquires TIPS and asks Jaimie Tilbrook to work for them. TIPS provided as an optional module in TRIM Context 6 - TRIM Context SharePoint Integration (TCSI)

2008-2010
Hewlett-Packard acquires TOWER Software. HP TRIM 7 launched and TCSI redeveloped as HP TRIM SharePoint Integration. Product supports MOSS2007 and SharePoint 2010. Many technical challenges implementing the integration

2010-2014
Product more widely adopted with HP TRIM 7.3 and SharePoint 2010. Microsoft develops new 'App' integration model for SharePoint 2013. HP Records Manager 8 released with complete rebuild in 8.1

2015
HPRM 8.2 Released and SharePoint 2013 integration is the most capable release to date.

Major impact of a classification mishap

By Georgina Stockley

FBI investigators are launching a new case to see if emails sent and received by Democratic presidential contender Hillary Clinton had the correct classification markings following revelations that an insider may have stripped the most serious "secret" markings from her emails.

Emails containing classified information – including spy satellite intelligence – were sent and received over Clinton's private unsecured server, over a three month period. In the US, stripping classification labels from intelligent information is a felony under the federal law.

News legal analyst Judge Andrew Napolitano gave his comment on "Fox & Friends" stating that this scandal was "a grave situation" for the Clinton legal team, giving further comments later in the week that deleting classification labels from Clinton's emails would constitute two felonies: One, altering a top secret document and two, storing a top secret document in an unsecured location – that being Clinton's private server.

Most serious of all the allegations surrounding Clinton's emails includes that information that was highly classified was mislabelled as unclassified. According to a report from the Intelligence Community Inspector General, the information in question should have been classified with labels up to the level of "TOP SECRET // SI // TK // NOFORN". A full guide to the marking of classified information within the US Government can be found here.

With email being the primary communication and collaboration tool within most organisations, it comes as no surprise that the need enforce strict classification rules and regulations in order to keep information protected is more important than ever.

While many organisations are still using more simplistic classification approaches, like the US Government, where documents are manually classified using simple visual markings, the leading organisations are turning to data classification solutions, such as Boldon James Classifier. These solutions offer a more sophisticated approach to classification, while still remaining user-friendly and simple to use.

In addition to visual labels, Boldon James Classifier also adds a metadata label which can be used to both enforcing security policies and invoke and drive other technologies such as encryption, data loss prevention (DLP) and digital rights management solutions.

While not condoning the apparent violations of numerous US government rules and regulations, had Hillary Clinton's team been using a data classification solution such as Boldon James Classifier to enforce their classification policy, the metadata label or tag would firstly have prevented the email from being sent outside of the organisation (to a private server for instance) even should the visual label have been removed.

Furthermore the metadata label will have invoked additional layers of security, such as encryption and data loss prevention tools to further enhance protection downstream. Unfortunately, the reality in this situation is, that by not following well recognised best practice, the Clinton campaign staff find themselves in a sticky situation, with it also safe to assume that foreign intelligence services including the likes of Moscow and Beijing will know exactly what Hillary's "private" emails as Secretary of State contained.

Georgina is a Senior Marketing Executive at Boldon James.

Report finds DOE staff use email like Hillary did

Former US Secretary of State Hillary Clinton isn't the only one who used a personal email account to conduct government business, with sole discretion over which emails she kept or deleted.

US Department of Energy employees routinely use private email accounts for public business and decide on their own which emails to keep or delete, according to the DOE Office of Inspector General. The US government employs more than 13,000 people at the department.

"Department officials noted that guidelines within which employees could send or receive work-related email from their personal accounts had not been established, making archival and retrieval of potential records difficult or impossible," the IG said in a special report.

The department's email applications also "did not meet federal requirements for records management because they relied solely on the use for identification and did not prevent the modification and deletion of records."

Many employees didn't know better. "In most cases, users were unaware that they were even responsible for identifying which emails should be retained as records," the IG said.

Investigators found widespread ignorance about how to identify and archive emails, including among "senior department officials" in the National Nuclear Security Administration. Less than half of employees interviewed said they manually archive emails, as DOE recommended. The Department also "had not effectively implemented the archival and retrieval process related to email records. Specifically, the methods and timeframes for archival and retrieval were often inconsistent and, as a result, limited the Department's ability to manage its email. Notably, the Office of the Chief Information Officer – which manages email services for numerous programs – had not established an effective mechanism for retaining email records. To be clear, under existing policies recovery of email may be possible for varying periods of time, however, the, process would be very difficult and cost prohibitive."

The US Office of Management and Budget told all federal agencies to use automated software for retaining emails in 2012, but only one DOE office now does so. There is a government-wide 2016 deadline for implementing the automated system. Meanwhile it has been reported that classified emails passed through commercial email services like Google and AOL on their path to or from a private server maintained by Hillary Clinton when she was secretary of state, but so far, the US government appears to have done little to retrieve or secure the messages.

In the midst of the ongoing Hillary Clinton email scandal, a new survey found one-third of government employees have used their personal email for official business. Alfresco, the ECM software company, looked into how employees use technology to collaborate in the workplace, and the results show Clinton isn't the only government employee potentially compromising national security by choosing not to use their official government account. Like the former first lady, the survey found 9 percent of the roughly 150 US federal employees it polled solely used their personal accounts for work purposes. And just 56 percent of government workers said they always take data security and privacy into consideration while sharing information with external stakeholders and clients.

Does this data have business value? I don't care!

By Andrew Sohn

Anyone who's had the responsibility to manage an end-user centred system has heard this refrain when asking people to get rid of old emails, documents, files, voice mail recordings, pictures, or any other electronically stored information (ESI). "I need it to do my job" or "It has business value and I need to save it".

I've decided not to challenge them or to ask for justification anymore. When I put on my CIO or CISO hat, I don't care if the data has business value or not. But there are many other things that I need to care about regarding this hoard of ESI. (When I put on my CDO or Data Analyst hat I care - more on that some other time.) Actually, I usually do have an opinion on the matter. But unless it's data in my domain of responsibility I'm not in a position to really judge whether a set of data has business value or not to someone or some business unit. So if someone says they need to keep an email longer than the 90 day retention period or they need an exception to the 3 year timetable for Record Type X, they need to appropriately document that fact but I'm not going to fight them on the business need.

These conversations usually come up regarding ESI in emails systems, network fileshares, hard drives, document management systems, storage as a service repositories (e.g. Box), software as a service repositories (e.g. Salesforce) and collaboration systems (such as the big junk pile known as SharePoint). But they also come up in transactional and operational structured data oriented systems. How many years of data should we keep in the Data Warehouse? Are transactions from 1990 on obsolete products useful? If the company's economists say so, who am I to argue that point?

While I can't argue on the value of the data, I do have the responsibility to manage and control how that data is kept. What do I care about? I care about where and how the data is stored. I care about ensuring that the risk of the data is understood, managed and minimized. I care the data is properly governed so it can be found and eventually destroyed. I also care about the cost of processing and storing the data.

Where the data is stored

If the data being kept is deemed to be a corporate record or needs to be retained due to regulatory requirements (e.g. all electronic communications of regulated employees at a bank), then there's really no question that the data needs to be moved into an appropriately compliant system. There are well defined capabilities that need to be in place to properly retain this data. But most of the data I'm talking about are not formal records. They are project related documents or summarized transaction records in a data reporting repository.

In order to be able manage, search, secure and ultimately get rid of this data, the retained data needs to be stored in a capable system albeit with much less rigour than a records management system. The system must to be able to control and monitor who has access to the data. It also needs to be able to associate and maintain a minimal set of metadata with the data. Simple things like who actually owns the document, when was it created and (really) last accessed, security classification, what project/department/account /etc. does it relate to, and others.

A standard Windows fileshare and out of the box SharePoint don't provide these capabilities. Emails stored within PST files on a stand-alone PC are problematic. Until recently, services like Box and Dropbox didn't support custom metadata. There are now a number of options to either move data to a better system or augment existing systems.

There are a growing number of Enterprise File Services systems that provide the ability to manage and protect this data that standard Windows cannot do (e.g. CommVault, Varonis). Third party tools for SharePoint can help rein in the free for all document dumping. And some level of automated classification and categorization tools can help transparently manage the ESI at creation time. (Policies and procedures are all fine and you need to have them, but I've rarely seen them followed if there's any extra thought or work needed from the user community).

Managing Risk

One of the critical items that needs to be determined is does the ESI contain any sensitive or otherwise risky information. This can be a complex problem and is unique for each company. If you're going to keep data, I'm going to scan the hell out of it for compliance with PCI, competitive business information and a list of organizationally defined sensitive items. . In the structured data world there are many straight forward tools available to do this, although they are not cheap, take significant compute resources and can be intrusive. For unstructured data, this is a lot more difficult. I found the best tools to do this came from the eDiscovery technology space. The same tools that can look to see if ESI is responsive to preservation requests or collection have a lot of features to perform sophisticated text analytics. This is a growing market and there's a lot of new tools and convergence happening in this market (see Microsoft's recent purchase of Equvio).

Once sensitive data is found there are a few courses of action. This is when I may challenge a user on if they really still want to keep this data given its level of risk. Assuming the data is still necessary and has business value, then it must be properly protected. Encryption is always a good option, but it's not enough since at some time the data needs to be unencrypted to be used. Data masking, anonymisation, and other techniques can be used to "neuter" the data. This is especially relevant for structured data found in data analysis repositories where trends are being addressed and specific information on individual parties is not important.

Managing the Cost

You commonly hear the phrase "storage is cheap". Well, compared to a few years ago, some storage infrastructure is certainly cheaper. But there are also a greater array of storage technologies, some of which have a quite expensive unit cost. So, even if a unit of commodity unmanaged storage is cheap, the total cost for storage media and management is not and keeps growing.

In the past few year I've been in many budget discussions talking about the need for tens of millions of capital dollars for new windows filer, additional SharePoint storage and increased infrastructure for a multitude of document management systems. There are many strategies for reducing the total cost of storage. These include technologies like deduplication, compression, and tiered information lifecycle management. It also includes understanding the probable use patterns of the data and placing it on the appropriate infrastructure. High speed highly available replicated media should be limited to special use cases. The use of virtual tape and other archiving technologies should be maximized for the rarely accessed data and those CYA documents. Even in the storage as a service world, companies like Amazon have different tiers of products (e.g. Glacier) and prices depending on the requirements. So, I'm not being just nosy when I ask about how you are planning on using the data and how that changes over time, I'm doing my duty to control some very significant costs.

In conclusion, if you say you have a business reason to keep some documents or data, I won't argue with you. In return, I don't expect you to argue with me on the how that data is kept.

Andrew Sohn is an experienced Information Technology Executive, Information & Enterprise Architect

Macedon Ranges takes the integration path for EDRMS

Macedon Ranges Shire Council is a local government area in Victoria, Australia, located in the central part of the state. It covers an area of 1,747 square kilometres and, at the 2011 Census, had a population of 41,860. It is home to distinctive mountain range of the same name, and the iconic Hanging Rock. The region is popular with both domestic and international visitors, due to its natural attractions, wineries, and its proximity and accessibility to the Melbourne metropolitan area.

In late 2014, Council selected Kapish with HP Records Manager (HP RM) through a tender process, to replace their existing Electronic Document and Records Management System (EDRMS). Council also use Infor (Pathway) as their property and rating system, which was a key factor in selecting HP Records Manager as the new EDRMS, due to the advanced two-way integration capabilities between these line-of-business applications.

"HP Records Manager has a very strong and solid history of integrating with Infor Pathway as the EDRMS platform of choice, and we are proud to work in conjunction with Infor to deliver this two-way integration utilising our Kapish Pathway Integrator, and the native Pathway HP RM integration", said Kapish Director, Jon-Paul Williams.

Council's adoption of HP Records Manager (HP RM) required two large data migrations as part of the project. The first data migration saw Kapish migrate more than 400,000 records into HP RM, which came from a previous EDRMS.

"This included some 948,000 rows of data with 9 million unique fields, 1.4 million rows of log information and 351GB of electronic files", said Williams.

In addition, Council chose to integrate HP RM with Infor Pathway for all modules in use, and in the process migrated over 200,000 electronic documents from the Pathway application repository into HP RM.

"The Pathway data migration was undertaken by Council's internal project team with assistance from Infor, Kapish and consultant Debbie Prout, who were all great to work with on this project", said Williams.

With the project implementation commencing in March 2015, the production cut-over occurred just four months later, on the Queen's birthday long weekend in June. Both data migrations were accomplished over the long weekend, after the previous EDRMS was switched to a read-only mode before the data migrations began.

Together, these two data migrations enabled the benefits of HP RM to be realised from day one, and allowed the previous EDRMS to be shut down immediately following, while delivering two-way integration between HP RM and Pathway. This was a key requirement by the business, to deliver immediate benefits to all users, and remove the need to manage legacy information in a separate application or pay for unnecessary maintenance costs ongoing.

Director from Prout Consulting, Debbie Prout was initially engaged by Council to develop a Business Classification Scheme (BCS) and as the project progressed and additional resourcing was required this role was extended to assist with the internal project management and implementation on behalf of Council.

With over 25 years' experience working with local government, the BCS was a fairly straightforward exercise for Prout, who was assisted by the work already done in this area by the Municipal Association of Victoria.

"We were able to utilise that as the starting point for a BCS for Macedon Ranges, so all of the mapping from the BCS to the Disposal Schedule was done before Kapish commenced the migration", said Prout.

Incoming mail is scanned and registered into HP RM via EzeScan, before being routed via workflow to users for processing.

"Council is still running a hybrid system that is fairly paper intensive for legacy records, but that will transition over the next 12 months, as almost all new records are now being captured electronically, or scanned via EzeScan where possible", said Prout. "Because of all the preparation work that was done at the start, the implementation and migration went smoothly and the challenge now is to look for business process improvements which Council can implement with the HP RM solution."

The bulk migration of documents from shared network drives is planned for the future using Kapish Explorer and the simplified drag-and-drop features. Kapish Explorer was selected as the primary interface for the HP RM solution, providing the ability to drag-and-drop emails into HP RM or use the native integration in Outlook.

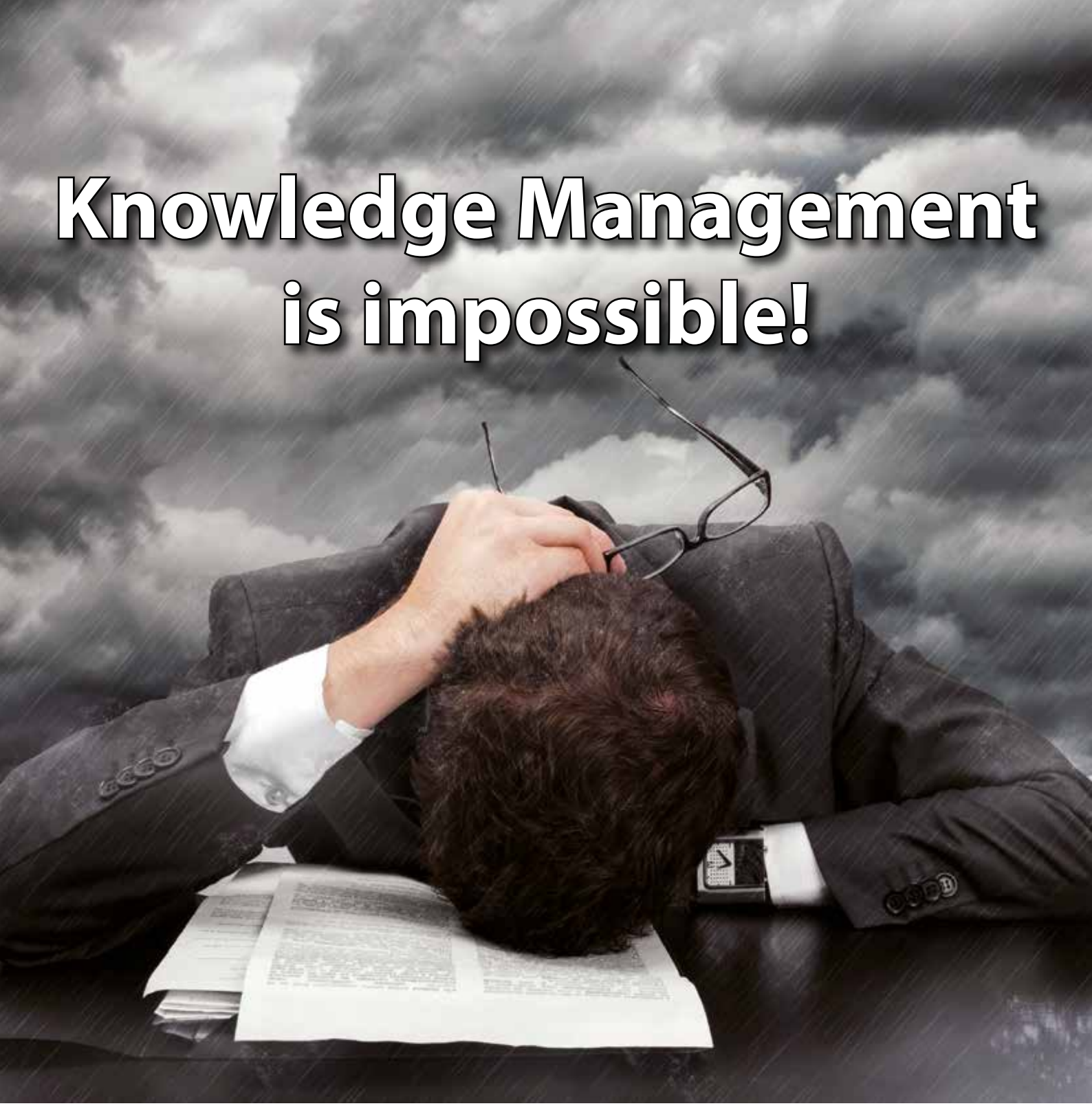
Other features that Kapish has provided include integration with MS Office via the Kapish Word Add-In (KWA) for letter generation and replies. KWA inserts a tab into the Microsoft Word Ribbon, allowing HP Records Manager Properties to be inserted into new and existing Microsoft Word Documents, as well as Mail Merge functionality.

Kapish Easy Link is used to generate permanent hyperlinks to HP RM records, which can be embedded into other Documents or applications supporting hyperlinks. This product provides the ability to link, for example, a policy document to the corresponding procedure (within the document itself; for easy retrieval), and publish links to a Policy Library website, while always retrieving the latest finalised version.

Planning has already commenced for the implementation of Kapish Web Grid (KWG), which will be integrated into ePathway for publishing HP RM records online through Council's website. KWG dynamically publishes lists of HP Records Manager records on the internet, intranet and SharePoint web pages. It is being used to allow council officers to share documents relating to development applications to external parties from HP RM.

"This solution was an excellent choice for Council, and the project team members, both internal and external pulled together to deliver the project in a short timeframe without compromise". "The next step will be to bed the system down for a few months, then look for continual process improvements moving forward", said Williams.

Knowledge Management is impossible!



By Robert Taylor

KM is a simple idea. So why does this simple idea turn out to be so hard to do?

It's true, the basic ideas of KM are simple and really don't need much explaining:

• Learn from experience. Improve the way you work by reflecting on and acting on each experience of doing the work. So how come this happens so little?

• Innovate - try new ideas out. Easy! Yet there is a constant flow of anguished business writing about the need to innovate more.

• Share knowledge. Of course! Collaborate, help each other, share what you know so everyone gets the benefit. But we hear all the time about inappropriate internal competition holding organisations back.

• Apply best practice. Seems too obvious to even say. But whenever anything that has gone majorly wrong hits the news it's much more likely to be a failure of not doing what was known should be done ("human error", failure to maintain or use equipment or follow protocol etc.) than some random or unforeseeable thing.

I've met hardly anyone who would vote against "learn, innovate, share and apply". It's readily acceptable. And virtually impossible .. or so it may seem.

So why does it go wrong? Well, here are just a few clues...

Altrusim and delayed gratification

Knowledge work often means doing something for someone else, some other time, some other place, to benefit from. Making an improvement to a process or guidance note or writing up a project, for instances, are for the benefit of the next person coming along to do the same thing you just did - it's so they can benefit from your learning.

Many times I hear people more interested in "what's in it for me?" (WIIFM?). We might say there needs to be altruism - or we might say that it would help to just take real pride in leaving things better than you found them.

Similarly, knowledge work sometimes means doing something now 'just in case' it's needed later. The benefit comes later and more and more the mantra of today is "I want it now". So some of it is people and what we're like and how we respond to the pressures acting on us ... but we gotta work with people!

Knowledge work is more 'explore' than 'exploit' - it's more about innovation and learning and development than it is about 'sweating the assets'... and we know where the focus of business orthodoxy is, especially in times of short-term pressures. Your business won't die quickly without KM.

> You have to work with the culture you have – so understand it ...

Lack of KM isn't today's emergency - and you may well have something else that is today's emergency or at least short-term high priority. It's not usually going to be where leadership attention is focused - and people will pick up on what matters and what they should be paying attention to themselves from that.

It's a true judgement that your business won't die quickly for lack of KM investment ... but it's not enough to leave it there without finding a way to transcend the paradox that your business will suffer horribly without learning, innovation, knowledge sharing and applying it's own best knowledge. So some of it is to do with priorities and resource allocation - management practice, in short.

A knowledge approach is based on a different "theory of the firm" / theory of value creation to corporate orthodoxy. It's based on nurturing the intangibles - experience, relationships, sharing. It's wholly dependent on a stock that walks out the door each evening (the knowledge in people's heads). It doesn't depend on a place (the workplace). It doesn't respect working hours or finite measures of productivity. It's against the prevailing corporate orthodoxy.

Finally (for now) KM hasn't always done itself justice. It sometimes suffers from seeming to be 'back office' or 'support' rather than right in the value chain. Some complicated and confusing tools and approaches have been put forward that obscure its simplicity. It's a magnet for the intellectually curious more than it is for action-oriented business transformers and leaders.

Coping strategies

So how should we respond to these challenges?

First, take an honest look at the situation – stop wishing it was different and deal with it the way it is. Enough already of bellyaching that "people don't get it" or "management doesn't support it". If you're in this business you're a change agent – and two things I've learned about culture change are:

- The culture will change in a way and at a time that it needs to – usually slowly – so understand the forces that are likely to change attitudes and behaviours and plan for different scenarios of how that may pan out.
- You have to work with the culture you have – so understand it – don't challenge the stable core because it will bounce you back out - look for the fault lines and margins.

For example, in my own organisation there's been a lot of change of senior leadership in the last eighteen months or so. I meet them and quickly work out who's up for what. Good news is that we have leaders in some areas who I can see have a serious reason and a serious commitment to do something I can help them with and that helps me build our KM household. I'm working with them and leaving the others be.

Get really practical and action-oriented and in the core value chain. Surf the paradox of doing something short-term … for the long-term. You have to deliver tangible solutions and results in real-time … but you can still do that within your own strategic roadmap and within your own end-goal framework.

So, for example, I've done a number of KM projects in Sales. These are about meeting a need those guys have now … but I can do that as one part of the overall jigsaw I'm building if I shape it right. I find that customers are very concerned with optimising their thing and not at all interested in what is the best overall model for everyone – but if you can find a way of giving them that and also getting done something you see a wider need for … then you have double benefits.

Being in the value chain means working in product development, sales, service delivery – in the chain of business activities that really matter. Be the business partner of these people – don't be a back office function that 'does stuff' – what I mean is, for instance, don't be the department that runs the intranet and supports communities … instead be the team that works with Sales to make sure they have the online resources and services they need to be effective; the support team for the Sales team. I know it seems like just re-framing – but re-framing is powerful!

That can't be everything – sure, agreed. There's so much more we need to do. But being realistic and action-oriented; working with the grain whilst treasuring the end goal in your heart and using that as your motivation – these will sure help us.

Robert Taylor is currently Head of Knowledge at BAE Systems Applied Intelligence, a business and IT consultancy based in the UK and operating internationally. For twenty-five years Rob has been a knowledge management (KM) consultant and functional manager with names such as Deloitte, KPMG and Unisys prior to his current role.

9 "Must Haves" of Records Management

By Grant Margison, Co-Founder and Director, Information Leadership

A fruit seller at the local market had "Best Quality" red apples for sale on one side of her stand at $3.50 and others marked "Great value" for $2.50 on the other side. A friend asks her – what's the difference between the apples. Her answer – just the price and what the buyer perceives…

Sticker price is not always a good proxy for value.

Information Leadership does a lot of EDRMS make-overs and reviews as well as fully blown EDRMS implementations in SharePoint. We've found the "red apple" dilemma applies to selecting EDRMS recordkeeping functionality. That is the functionality and usefulness of different systems often has little to do with price.

This has led many implementations into "having" a records management engine but not necessarily "doing" or getting value from their records management tool. Through our experiences, there are nine must haves for doing records management in modern systems. Some are obvious and relate directly to core records management practices like disposal while others make records management far more effective and more relevant to the organisation.

Here is our checklist…

1 Metadata Driven R&D Rules

"Win-win for users and record keepers"

Allows the establishment & execution of a wide range of record-keeping rules driven by metadata, not just record location. This allows global rules to be set up (e.g. how contracts are managed, no matter where they sit in the business classification and file structure). It also allows for multiple rules acting on a file location (e.g. document library).

How useful? It creates a win-win for users and record keepers, as the location can be designed for users first. This makes it easier for them to file and find, so adoption is high.

Record keepers are happy because their rules separate out the different record types in this location.

2 Case file R&D

"Local empowerment saves record keepers time"

Working with iWorkplace Smart Folders, allows local admin people in teams to elegantly close case files and in doing so, records are moved to libraries that have retention & disposal rules. They do this by just updating a master case file list with the new status of the case file (e.g. closed, finished, sold, person has left).

How useful? This deals with the difficult and time consuming task record keepers have of triggering R&D at a time not known when the records were created (e.g. about an asset - you won't know when they are to be sold or decommissioned at the time that the records are created). Without this, they need to find the records at the time when the case file is closed and kick off the R&D process.

3 Manual Appraisal and easy system wide analysis

"Efficiently deal with huge volumes of records"

Easy to look at records grouped, sorted by metadata and not just libraries (where they reside), sites or site collections. Lets you globally identify problems and inconsistencies. The action tools then allow you to make changes immediately in bulk, with a record of this in the transaction log, with your narrative on the problem and your fix.

It is also easy to give the records in question a batch number, export a summary of the records to a pdf or spreadsheet. This can then be used to gain manager approval to take action. Once this is sought then the records can be called up by batch number and action taken.

How is this useful? Better insights and action, takes less time to understand your content, pick up problems early, deal with bulk record changes including metadata update and moving records due to organisational and other changes. Brings manager approval into the R&D process elegantly at a batch level.

Grant Margison co-founded Information Leadership with Sarah Heal in 2004. He started their digital workplace focused SharePoint practice in 2007 and continues to drive its direction and innovation. Grant has an engineering science degree and diploma in business.

4 Information Governance

"Actively manage & monitor library integrity"

Easily see and create reports library (called file locations in some systems) creation and areas no longer being used. Identify ad hoc set-up of libraries or metadata problems as they happen, then use the action tools to fix them or move content in bulk. See the big picture and be able to move content and update metadata in bulk.

How useful? Gives you the tools to easily and actively understand and manage your content. This is particular useful in systems like SharePoint, where information is containerised and therefore hard to analyse across what might be thousands of locations.

5 Adoption Reporting

"Immediate & flexible to pinpoint problems early"

Allows you to measure the health of your deployment and to see what potential problems are developing, without having to get technical people involved in creating the reports.

Quickly set up reports yourself to show what documents, photos, emails etc. individual users are adding to the system. Place these reports on your dashboard for quick access.

How useful? The immediacy and ease of this means that it's like driving a car – you get feedback on your speed immediately so you can do something about it, not in a report several weeks later, when it's too late and less relevant.

This means that if you are meeting a team or individuals you can pull up live reports on what content (e.g. documents, paper records, email, photos) is being created by whom for this week, is the metadata being entered correctly and are the records in the right place.

Often adoption problems have legitimate underlying causes (lack of training, technical glitch, unclear where to put a record in the business classification). By getting immediate intel, you can work with the users to address the underlying problems and raise adoption and their satisfaction.

6 Report on R & D

"Efficiently structure your R&D flow of work"

Flexible and targeted reporting on R & D actions that have happened or are due to happen. Group, sort, filter content across the entire system and export to spreadsheets, pdf and data formats as needed.

How useful? You have control. You can set-up reports and add them to your dashboard without relying on technical support or a vendor to help.

7 Bulk global actions

"Immediate & flexible to pinpoint problems early"

Through automated rules or manual appraisal, easily make bulk changes to records (including updating metadata, moving or copying content, removing previous versions and creating authoritative versions). All recorded in the transaction log.

How useful? Allows you to see how content is organised and to address any metadata discrepancies. Highly useful for migration from file shares or legacy EDRMS where you want to do more than just dump content into your system, or when there has been a significant organisational change.

8 Global Workflow & auto-classification

"simplify the flow of work"

Create automated rules that will take actions on records. For instance:

• Inwards mail or jobs can be routed to different teams, via a status field. When the status is "Operations", the records can be moved to the Operations file locations

Often adoption problems have legitimate underlying causes (lack of training, technical glitch, unclear where to put a record in the business classification).

• Update metadata based on known file information. For instance if the filename contains the word "report" then set the Document Type to equal REPORT

• Combinations, where users can use shortcuts (e.g. in the field) to set metadata or take action. For instance, if the filename contains FINAL then lock the document down. If it contains #234, then set the job number metadata to 234

How useful? Simplifies the flow of work and reduces the need for manual action by users or record keepers, or complex and widely distributed workflow.

9 Manage file sizes and versions

"Save on storage costs"

Find content by file size and version number, by configuring the reports yourself. Splice and dice the results and export if needed, or place on your dashboard. Set up one off and automated rules to remove unneeded content, or versions, or move content to another lower cost repository such as a locked file share, leaving a link & the metadata in the system, so it can still be found and managed.

How useful? Save on storage costs, reduce clutter

Southern Cross Care deploys Verian for Purchase to Pay (P2P)platform

Purchasing and Invoice Processing Software supplier Verian has announced a new deployment in Australia with an implementation at Southern Cross Care (SA & NT) Inc. the largest aged care provider in South Australia and Northern Territory with a turnover of $A140 million, 1,300 aged care beds and 1,000 independent living units.

Verian's cloud-based solutions for Purchase-to-Pay and budget management were implemented for SCC in under four months in partnership with Dataline Group, allowing SCC to begin capturing and managing organizational spend.

Verian's solution will support SCC's initiative to elevate procurement to a more strategic function within the organization and drive savings through greater efficiencies and compliance with supplier contracts.

Facing an uncertain funding environment, SCC is leveraging the cost containment aspects of the Verian solution to:

Ensure impeccable stewardship of all funding

Track all spending and negotiate better contracts to find new ways to save money

Develop a function to champion cost-savings behaviour across the organization

"Verian's in-depth knowledge of P2P has proven tremendously valuable to us," said Antony Pivato, Director of Finance at SCC. "Through their expertise, we are making our funding go further with a system that our users find easy and intuitive."

Dataline worked with SCC throughout the buying cycle and will continue to provide on-the-ground support and availability. Verian has worked with Dataline to serve customers in the Australian market for three years.

To learn more about how Verian helps non-profits and other organizations institute controls and save money, download the white paper Purchasing & Invoice Automation: Why Hundreds of Companies are Taking the Plunge.

RACT Insurance goes live with SSP and e5

RACT Insurance, the insurance subsidiary of the Royal Automobile Club Tasmania, has gone live with the SSP Pure Insurance offering and e5 Workflow solution after a 19 months implementation phase.

RACT, Tasmania's main motoring organisation, offers a wide range of motoring services, insurance, tourism and travel products, with its insurance subsidiary providing its members with home, contents and vehicle insurance options.

SSP Pure Insurance provides all of the key components needed to manage an insurance operation including policy administration, product development, claims management, finance, reinsurance and co-insurance as well as inbuilt document management, task management and business analytics.

A fully scalable, web-enabled solution, SSP Pure Insurance provides a modern platform for RACTI to manage the entire business lifecycle from a single solution.

SSP Pure Insurance and e5 Workflow forms a fully integrated solution, with SSP Pure Insurance providing the core insurance capabilities and e5 managing work allocation, task generation and workflow configuration and management.

The highly sophisticated claims workflow facilities will enable RACTI to realise operational efficiencies and generate information intelligence. These include improving speed to market, distributing products more efficiently and dynamically managing risk rating.

Paul Miller, SSP general manager, Asia Pacific said technology was playing an increasingly important role in providing insurers with a platform meeting the needs associated with constant industry changes and modernised products while providing automation of processes and tasks to help reduce operating expenses.

"RACTI was constrained by its legacy platforms, which lacked the flexibility and speed required to respond to an ever changing and competitive marketplace.

"SSP was appointed in September 2013 to replace RACTI's legacy system and we are pleased that we've been able to implement a customised, fully integrated solution for RACTI," Mr Miller said.

Craig Van Zeyl, Founder and CEO of e5 said it was exciting to see a customer take advantage of the innovation opportunities provided by the e5 and SSP partnership.

"The combination of e5 and SSP Pure provides a truly world class insurance processing capability, and puts RACTI ahead of its competitors," Mr Van Zeyl said.

According to Trent Sayers, Chief Executive Officer, RACT Insurance, there was a growing need within motoring organisations to understand its members better, the services they use and benefits they receive, and to be able to offer more customised policies.

"Upgrading our systems to SSP Pure Insurance and e5 workflow, and integrating these into our membership system, provides us a strategic platform to compete and grow.

"The implementation of a leading policy administration system allows us to innovate, improve operational efficiencies, and most importantly enhance customer service," Mr Sayers said.

The contract between SSP and RACT Insurance was signed in September 2013 with the implementation phase finalising in June 2015.

Red Cross moves to the Cloud

Technology firm Professional Advantage has commenced a migration to a cloud-based intranet solution for the Australian Red Cross.

With around 22,000 volunteers, 20,000 members and 2,500 employees and headquarters in each state and territory, Australian Red Cross is one of Australia's largest not-for-profits. The organisation engaged Professional Advantage to plan, design and configure a new intranet solution following an RFP selection process.

Professional Advantage cloud and collaboration solution advisor Andrew MacKenzie said the new solution leverages Microsoft's Non-profit program, which provides Office 365 for free to qualified not-for-profits.

"While Office 365 includes access to the latest versions of Microsoft Office, Microsoft Exchange for email, Skype for

Business, One Drive and Yammer, the first phase of the Australian Red Cross rollout was very much focused on the Office 365 SharePoint platform for the Intranet," Andrew said.

Australian Red Cross IT portfolio manager Brian Gates said the organisation wanted to leverage Microsoft's Office 365 platform to simplify content management, engage the business, modernise communication and sharing; and from an IT operations perspective, gain access to a platform with a continuous improvement cycle to reduce investment and support requirements.

In collaboration with Australian Red Cross, Professional Advantage developed a collaborative and social Office 365 intranet solution called The Lounge as a welcoming environment to encourage Australian Red Cross employees to make regular use of the solution.

"The Lounge is a single source of truth for key documents, including policies and procedures. It also features team sites so that departments can share resources and disseminate information between employees" said Gates.

"Some of the key feedback we received from the Australian Red Cross was that The Lounge needed to be a comfortable and happy place to visit. It needed to be sticky, and a place that people would come back to visit again and again. They wanted to make it easy for teams to collaborate and locate information," Andrew said.

"By the end of the year we will have decommissioned our current Intranet and Wiki sites to help reduce the complexity of using multiple platforms for the business and IT teams. Initial feedback from Australian Red Cross staff, management and end users has been extremely positive, with staff actively seeking training. "

In the coming phases of the project, Professional Advantage will work with Australian Red Cross to create an easy-to-access, secure extranet portal for volunteers. Also built on Office 365, this solution will help volunteers in their day-to-day activities supporting the Australian Red Cross mission.

Baker & McKenzie takes leap with SAP

Baker & McKenzie has become the first global law firm to run the latest version of SAP, employing the solution across all of its 77 offices in 47 countries.

SAP is a powerful, scalable solution that is used by 86% of the Global Fortune 500, including a significant number of Baker & McKenzie clients, that provides robust billing and financial process capabilities as well as accurate talent management information and other process oriented modules.

The single-database core SAP system that Baker & McKenzie now has in place is supplemented by Fulcrum's Pro Billing for Legal, a certified Rapid Deployment Solution configured specifically for the Legal Industry which provides the flexible billing options the Firm needs to work with clients, as well as the platform for a self-service Reporting Portal.

Every office in Baker & McKenzie is now using SAP for billing and finance management, with personalized dashboards so that staff can track their own performance. The system runs in 21 languages and is accessed by nearly 1,350 daily users, with the reporting portal available to all fee earners and key support staff. Reporting systems are run in real-time with core metrics and key performance indicators so that up to date reports are available to meet clients' requirements for accurate and timely information.

Craig Courter, Baker's Global Chief Operating Officer, said: "The legal services market is changing, and we needed a more scalable platform that enables uniform and consistent global operations. We selected SAP and Fulcrum because we needed our financial operations to work as seamlessly and efficiently as our professionals when representing clients."

Baker & McKenzie Chairman Eduardo Leite says, " At the heart of this project was the desire to manage and provide our data in a harmonized, consolidated fashion everywhere we do business. For an organization as complex as ours this was always going to be a bold move, but I am delighted with how the transition to SAP is already reaping rewards in terms of how we interact with clients as an integrated, global firm."

Kaspersky Lab secures PM & Cabinet

Kaspersky Lab has announced it is delivering its security offerings to the Department of the Prime Minister & Cabinet across Australia.

"Kaspersky Lab is proud to be protecting the Department of the Prime Minister & Cabinet, including its almost 2,500 employees across Australia," Kaspersky Lab's Australia & NZ managing director, Andrew Mamonitis, said.

"It is testament to the strong confidence key players on a national level have in our robust portfolio of security offerings."

Kaspersky Lab's Chairman and CEO, Eugene Kaspersky, was in Australia earlier this month for the AusCERT information security conference, as well as for industry and business events across the country.

Kaspersky Lab's Australia strategy has been geared towards a collaboration with government agencies and delivering to Australia its global cyberthreat intelligence services, including the provision of policy and technological proposals to deal with the cyberthreats to Australia.

"We are and remain at the forefront of the IT security space. Our extensive role in working with international agencies both globally and across our region means we are able to effectively respond to the impact of the global cybersecurity landscape on Australia," Mamonitis added.

NSW Govt. embraces data analytics

The NSW Government has announced plans to establish a whole-of-government data analytics centre.

Minister for Innovation and Better Regulation Victor Dominello said it would be the first of its kind in Australia.

"Data is one of the greatest assets held by government, but when it's buried away in bureaucracy it is of little value," Mr Dominello said.

"Whether it's tackling crime, combating obesity or addressing housing affordability, we cannot hope to develop solutions to the long-term challenges that our state faces without an effective whole-of-government data sharing platform.

"Data analytics has been used successfully in jurisdictions like New Zealand, New York City and the State of Michigan to improve the lives of citizens through better targeted and more coordinated government service delivery."

Managing Information: The Knowledge Deficit

By Kevin Dwyer

Over the last few years I've been involved in several Electronic Documents and Records Management System (EDRMS) implementations. I've also been involved in a number of Information Technology (IT) implementations which, to all intents and purposes, were about the management of information.

When we start a consultation, one of the outputs we deliver is a list of motivators and blockers to change. I won't bore you with the details of our methodology, but we set out to talk with sceptics in particular to find out what it is about the system implementation that makes them believe it will not work. They are really good value, because their unique perspective gives us a great idea about what those blockers and motivators are.

What we inevitably find in any EDRMS or information management implementation is that there are a number of misconceptions held by stakeholders about both what information management means, and about the functionality and capability of the systems used to solve business process issues. Taking those stakeholders – including users, managers, IT staff, and senior executives – on a journey away from unconscious incompetence is a key element to any successful implementation.

And yet, despite the all-encompassing discussions about 'Big Data' that everyone talks knowingly about, there seems to be a staggering gulf in the thinking that occurs about the management of information. From any standpoint, whether it is strategic, technical, systems functionality, process, people, or information security, the maturity of the conversation and comprehension of the potential of EDRMS and information management principles is very limited.

For example, I have had two clients who made tactical decisions about their preferred information repositories based on the erroneous assumption that Freedom of Information (FOI) searches would be able to find drafts and revisions stored in an EDRMS, but not those stored in shared drives. In both cases, the desire was to shield the organisation from what they perceived as unfair scrutiny, but in both cases the supposition was wrong – not only in terms of the functionality of an EDRMS, but also in terms of the regulations governing FOI searches. Freedom of Information applicants are quite within their rights to seek access to email attachments, let alone drafts on a shared drive.

The lack of thinking and knowledge staggered me in both cases.

These types of assumptions and lack of thinking cripple the efficient and effective management of information in most organisations I have seen. I am at the point now where, near the beginning of an engagement, I look for evidence of a few typical deficits in knowledge and thinking. Below I consider some of the symptoms of those deficits, along with some thoughts on resolving them.

Strategic Deficits

When there's a deficit in strategic thinking, the organisational information management strategy is somehow seen to be the purview of people regarded as records management experts or IT 'boffins', and there is a remarkable hands-off approach by the rest of the executive team.

> An information management strategy has no intrinsic value in its own right

When taken seriously, the management of information has three purposes:

- To retain corporate information and knowledge to make it easily accessible to others who might benefit from it.
- To improve productivity.
- To reduce risk.

An information management strategy has no intrinsic value in its own right. It should be discussed and determined in the light of the corporate strategy which should help determine what information is considered to be an asset to the organisation.

It should be treated seriously though, and as much as there is an enterprise technical architecture document, there should be an information architecture document and an information security management system supporting the information architecture.

It is very rare that I see an information management strategy forming a closely coupled part of the organisational strategy. It is even rarer to see an information management architecture document. How do people establish the criteria for making decisions without it?

Technical Deficits

I've been surprised at the number of times I've found that there seems to be little in the way of a strategic deployment of technology and systems. Often there is no real systems architecture documentation or planning. There are dozens if not hundreds of team databases. New technology and software that solves a problem in one branch of an organisation seems to be able to be bought with little consideration of the overall structure, or the mix of technology and software that supports the organisation's strategic needs.

This is exacerbated when the organisation has record-keeping zealots who do not seem to be able to realise that every record, however defined by the organisation, need not reside in the EDRMS. It is possible to define a recordkeeping system and determine which business systems meet the appropriate requirements and therefore form part of the record-keeping system with the EDRMS.

Systems Functionality Deficits

This is probably the most common of all knowledge deficits. Decisions are made about policies, processes, and procedures (such as my opening example on whether to include drafts in an EDRMS) that are just downright poor for the overall management of information assets.

It is fair to expect that executives do not fully comprehend the functionality of an EDRMS, for example. However, the systems administrator or records manager should see it as a priority to know the strengths and weaknesses of their chosen system. Most often it is not.

Vendors are quite disappointing in this aspect too. They fall in two camps for me. One camp spends their time spruiking the benefits of big data without being able to answer a simple question about the functionality of their system. The other pushes automation by the system or system add-on over getting to grips with the functionality and how to integrate that functionality into the business processes to improve productivity and reduce risk.

Where are the vendors who educate people in how they may use the functionality to suit their culture and processes and their needs balanced against their limitations?

Process Deficits

Most organisations have not mapped their processes, and the understanding of what the process actually is varies widely across the organisation. It's a bit hard to integrate system functionality into a process to improve productivity and reduce risk when we don't even know what the process is.

A corollary to that is that record and information management (RIM) teams often do not know how to map processes.

If the business does not know its processes and the RIM team is expected to drive the adoption of better information management practices and systems, then it is actually necessary for them to acquire process mapping skills.

People problems

I wish I had a dollar for every time I've heard someone say "Our people are just waiting for this, we won't have any problems with implementing."

My usual internal response is to wonder if the person I'm talking to is serious. The information management space is littered with failed implementations. I have seen often the two times failed implementation. I have seen often the 5-10% adoption level. I have seen the archiving-only approach which leaves so much productivity gain untapped.

> Most organisations have not mapped their processes, and the understanding of what the process actually is varies widely across the organisation.

Our research shows that abject failure runs at 25%, and I suspect from qualitative reviews that if 'failure' was defined as 'less than 85% adoption of better record-keeping practices and systems', that the failure rate could be triple that.

The most frequent common denominator, despite all of the foregoing, is that the people factor is underestimated. From the central IT group who are desperately clinging to the mainframe or seeing SharePoint as the saviour of all things, to unconsciously incompetent executives, to users who have to give up their old system in which they have become experts, to legal who always believe they have special needs outside the realm of any information management approach and system, there are a plethora of people who, at some time in the life of a project, will have a perceived problem.

The impact of even one of these knowledge deficits is a substandard management of information. The impact of two or more is from my experience, the probability of wasted time in rework and manual operations, delays in decision-making, uninformed decisions and risks to people, assets, the environment and the reputation of organisations that simply should not occur. Consider whether your critical thinking is up to scratch before you embark on your next RIM implementation, or you might find yourself back where you started.

Kevin Dwyer is Managing Director of Melbourne-based management consultancy Change Factory.

Mumba Cloud gets down to business with Enterprise Social Hub

The Happy Accident, which is often cited as a principal ROI of enterprise social networks, refers to the chance discovery of the right person or the right piece of enterprise knowledge to solve a business or process challenge. For instance, Bruce in Melbourne, dealing with a corporate crisis, fires off an anxious Yammer/Jive/Tibbr post at 6.00pm in the evening Sydney time, before heading off to a nervous sleep. Meanwhile, as Bruce slumbers fitfully, at 3.00am the following morning Colleen logs in from Dublin and comes across the post and immediately fires back with the critical data. Bruce did not know Colleen was the one to turn to, nor even how to find here, it was all a Happy Accident. Enterprise Social wins again!

Anthony Zets, CEO and founder of Australian software start-up Mumba Cloud, thinks that the long odds of a Happy Accident occurring is a key reason why enterprise social tools such as Yammer and Jive are quickly adopted but fail to gain long term viability within the organization. He says that enterprise social software has moved past basic activity streams and now has the ability to overhaul business process and enhance day-to-day productivity. The former Deloitte Analyst founded Mumba Corp in his parent's garage in 2006, launching what he describes as an Enterprise Social Collaboration Hub. Relaunched in 2010 as Mumba Cloud, it aims to help in communicating and co-ordinating large, highly dispersed teams in global corporations. Its flagship customers include food service company Compass Group and facilities management group ISS World.

"Yammer approaches the market from the bottom up, and it's all about unstructured, flat communication. It's just meant to grow with absolutely zero structure within the organisation," said Zets.

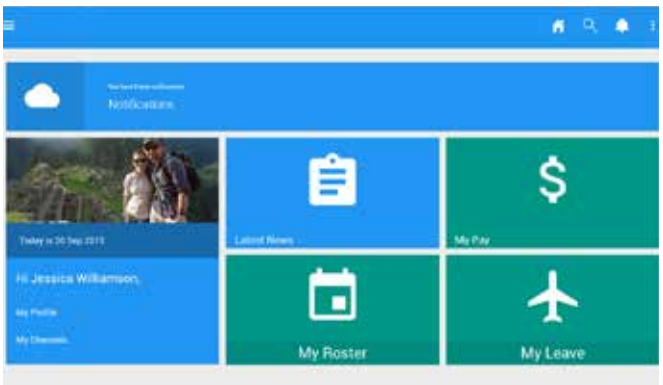
"Mumba Cloud from day one has always been a top down product where we focus on structure.

"It's not just about providing communication and collaboration, it's how do you scale that within a very large organisation where you've got thousands of employees. A product like Yammer works very well with 20, 50, 100 people, but thousands of people using Yammer and it just becomes a mess, just a stream of consciousness that's impossible to follow. So we were looking at more practical solutions, how we actually deliver tangible value."

Following a recent $A2 million capital raising, Mumba Cloud has added to its 12-strong Surry Hills, Sydney based team with its two latest recruits, former eBay software engineer and legendary Joomla open source founder Andrew Eddie and enterprise software sales specialist Jeff Leibovici hired from Lexmark/Readsoft. It is now on the hunt for more enterprise clients in Australia and planning a future move to the US.

In addition to offering the typical elements of an enterprise social networking interface, Mumba Cloud includes useful applications to help avoid rogue IT implementations that pose security threats and potential loss of IP..

"As more software vendors move to the cloud and open their APIs, the more opportunity there is for vendors such as Mumba Cloud to come in and fill the gaps." Mumba Cloud CEO Anthony Zets.



Payroll and HR functions embedded in the Mumba Cloud interface.

"We've got a survey tool and a knowledge base and a rich media module, and Wikis and pages, all that you would expect to find in various consumer social apps," said Zets.

"But the way they can be manipulated and configured in Mumba Cloud supports business outcomes. We've got a lot of automation. We've developed a rules engine that allows you to automate these processes and map them. That's what's different."

Further to the social applications, a program is underway to embed the essential functionality of enterprise apps such as Kronos and Chris21 into the Mumba Cloud interface. Mumba Cloud is actually building the front-end look and feel to these systems so that employees can access their payroll and rosters alongside business news and content all through the single Mumba Cloud application.

"We're not looking to rebuild the entire interface, just the screens and the interfaces that are hitting your front line employees. For example what they need to fill in a leave application, we're not building the whole back end administration."

"As more software vendors move to the cloud and open their APIs, the more opportunity there is for vendors such as Mumba Cloud to come in and fill the gaps."

Zets prefers to refer to Mumba Cloud as a "hub" rather than the traditional "portal".

"A hub's more of a destination, whereas you go through a portal, and a hub you can stick around at. So we're looking to provide this hub that integrates these systems and that provides you this similar look and feel so that we can demonstrate tangible ROIs to these businesses.

When asked about document management, Zets has a plan for Mumba Cloud that is focused on integrating existing document management systems into their collaboration modules.

"Documents are a lot more meaningful when they're in context, and while everybody has their file repositories where you've just got your documents listed, there's no context provided. In Mumba Cloud, especially in the next version of our software that's coming out, there's going to be a lot of tools to be able to embed files in workflows, projects and in discussions and conversations, so that if you're looking at a file you can easily understand why the file exists and what it is related to.

"It's true that many organisations today look at SharePoint as the default for this, and theoretically you can do anything in SharePoint, but to actually get it to do what you really want would cost you a small fortune, and a lot of time and effort. It's a very rapid implementation with Mumba Cloud, and it's a significantly cheaper implementation.

https://www.mumbacloud.com/

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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.

Objective

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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.

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ELO Digital Office

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ELO Digital is a truly global ECM company with Australian expertise! With subsidiaries in 48 countries and hundreds of thousands of users, ELO has become the natural choice in ECM. Having been voted ECM company of the year in 2013 and 2014, ELO was officially recognised for its comprehensive functionality, user friendly design, trend-setting innovation and modern technology. The Australasian HQ of ELO was established in 2005 and has gained an impeccable reputation on all levels of Government, the Private Sector, NGOs and Not-for-Profit Organisations. The completely scalable product allows ECM implementations from as little as 5 users to solutions for many thousand staff members. With reputable certified business partners such as Toshiba (Australia), Iron Mountain (Australia), AMS Imaging (Australia) or Jardine OneSolution (Hong Kong) ELO customers are assured of quality implementations, successful rollouts and continued support – 24/7/365. The VERS compliant ELO product provides solutions for Document Management, Records Management, Workflow, Accounts Payable Automation, Imaging, Contract Management and mobile applications for all industries. ELO can be deployed onsite, in the cloud or as a hybrid solution. ELO is THE complete ECM solution for all organisations, departments and industries.

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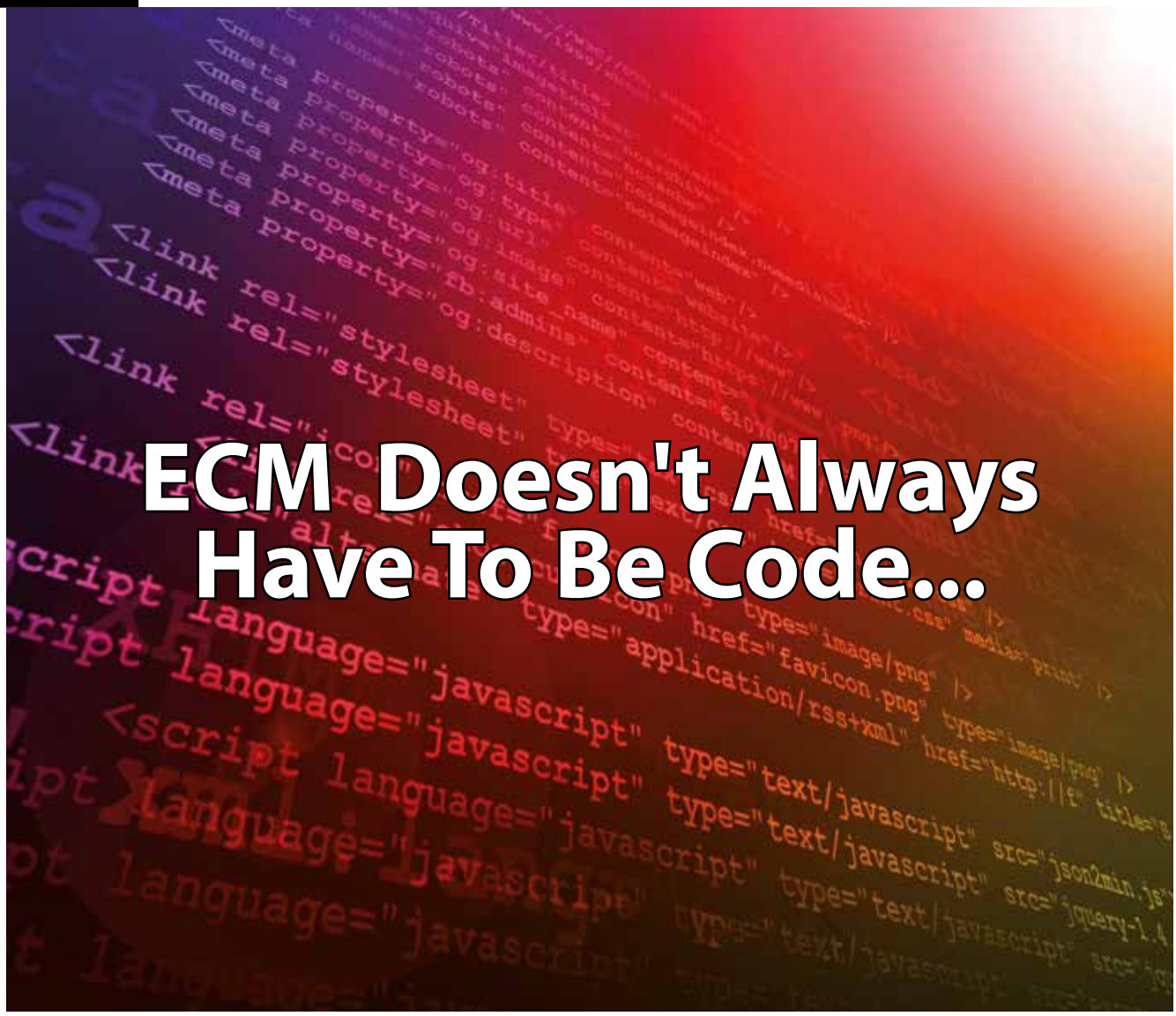
Information Leadership is New Zealand's leader in compliance grade records and document management, intranet, extranet and business solutions built on the SharePoint platform.

With over 80 end to end implementations under its belt, it has developed a systematic, safe and cost effective way to implement SharePoint using its iWorkplace methodology and extension tools. This includes Nintex & Harmonie partnerships for workflow, forms and mobile use.

The systematic approach allows customers to become as self-sufficient as they wish, in supporting and growing their own digital workplaces. This includes BA and super-user level formalised training and mentoring.

Information Leadership also has a flourishing technology independent consulting practice covering all aspects of information and knowledge management.

Assignments have included information & data strategies for major government agencies, compliance training and audit readiness, taxonomy building and retention/disposal schedule development, as well as designing and delivering compliance training on behalf of the NZ regulator.



ECM Doesn't Always Have To Be Code...

By Marcus Christian

Disclaimer: I am a GUI guy by trade. I've worked in user interfaces since I was 6. Yes, I wrote code in BASIC back in junior high, but it was never "fun". I like to just fire the thing up, look at it, tweak it, and run it. Code has to be remembered, researched, and formatted. It's picky. It doesn't like to be "just written". Brackets have to be flawless. Case matters. So many things to think about. Yes, I'm familiar with and can read/write (mostly) .NET, JavaScript, VBScript, HTML, etc. Yes, I know IDEs are designed to make some of that easier (but only if you have 95% of correct already). But I only like doing it to extend an application that's deficient. I don't picture myself sitting and writing code all day, every day. Just isn't my thing, I'm not nearly good enough at it because I don't have the patience.

Now, to the point. I understand the value of writing code. But I take the path that code should improve upon a thing, not be a thing, unless you have no other option. Many websites these days are actually rendering from a script. I can't stand that. I use the NoScript plug-in religiously, and of course these pages don't load at all. Used to be that standard HTML was good enough for most everyone, and even throwing CSS in there is fine; scripts were more for "rich" or active content that wasn't required for accessibility or readability. HTML and CSS are, for the most part, safe and not likely to harm an operating system. VBScript is not. JavaScript is not. If all you're doing is showing a news page, why do you need a script to just display text?

I have the same gripes with ECM implementations. Many that I come across all say they want a Java/.NET developer, and right away I know they're just going to write some custom application. But then I see they own LiveLink or FileNet or Documentum or OnBase or Stellent or something else, and I question why the custom application is needed. I ask further, and all they're really doing is writing some tool to view documents. Their reason: "<<<insert vendor here>>>'s application is ugly."

I miss the days when companies just wanted things to work. They were not so preoccupied with internal only user applications. I don't know, maybe I'm the only one who clearly remembers how horrible and childish Windows 95/98 looked, with Clippy nagging you at every turn. Nobody cared; all that mattered was that it allowed users to launch their apps and get things done.

Say a company wants to automate their invoice generation and archival system. They would like to automatically retrieve stream data from their accounting software, dump it into their content management system, generate PDF invoices, and make them available to vendors via a custom web interface. Straight forward, right? But there are many ways to do this. Some might just crack open Visual Studio or some other IDE and start writing code. Some might lean towards SharePoint. There's nothing wrong with choice, and it really does boil down to how much a company wants to invest for the end product.

Normally, a company should follow a few generic steps to

getting that system up and running. Some of these steps may not apply, depending on the size of the company, but they all assume the company is going to build it in-house rather than outsource.

1. Draft high level requirements and expectations. Are all invoices to be archived, or only a subset? What is the selection criteria? What is the SLA for invoices being available? What is the transition plan from the current application to the new? What is the "finish line" (i.e. success criteria)?

2. Determine the players. Who is ultimately the final approver for what gets done? Who will refine the requirements? Who is responsible for development, QA (if applicable), deployment, and support?

3. Determine the approach. Will it be done in phases (i.e. electronic archival first phase, electronic presentment second phase, etc.) or all at once? What is the timeline for delivery, and how does it match up to the approach?

Step 2 is where things start getting cloudy, because there's always a bias. Say your developers are 100% SharePoint guys and gals; the first suggestion will always be SharePoint for the solution. That's fine, but is that truly the best solution based on what the success criteria demands? Yes, SharePoint can present data as an external interface, customized according to business design specifications. But can it take backend stream data, parse and format it, apply an overlay, convert to PDF, and index it without user intervention?

(The answer is "Yes, with external tools and lots of code.")

Compare that against other systems such as FileNet, which is significantly more expensive than SharePoint, but contains every component necessary to meet the stated objective. Suppose that our mythical company owns both SharePoint and FileNet, but FileNet has thus far been only used for back office activities. Additionally, the company does not have significant FileNet developer expertise in-house; most of what's built came with the system when it was first set up.

Don't force things

There are many schools of thought with this; I'll share mine. I'm a firm believer in "right tool for the job", rather than "square peg in a round hole" with respect to meeting business objectives. In other words, if I have a tool that can do everything I want despite it not being friendly looking or easy to use, I'll prefer it rather than trying to force my preferred application to do something it wasn't designed to do.

Often, customers will apply their own bias for or against a given application based on what they know and are comfortable with, rather than selecting the best tool for the job. If I have a high speed scanner with Kofax VRS, I'm going to prefer it over a multifunction device that happens to have scan capabilities if they're in the exact same location. I wouldn't print and manually fax a document through a multifunction device if I have RightFax with email-to-fax capability (before anyone jumps on me, know that in the response to "I need to sign it!!!", FoxIt Reader allows you to stamp a signature bitmap on any document for free). The list goes on and on.

So our mythical company may have meetings to discuss the right option for building the new portal, and almost instantly, everyone will go through a groupthink phase after Developer A chimes in with full confidence that SharePoint can do 100% of the work. Yay, us! It'll only take 4 months to deployment.

But then the lone FileNet developer, who was only invited to the meeting because his manager happened to call in sick, chimes in to ask, "but FileNet can already do all of that, and just give the data to SharePoint as a front end, with little to no code needed, in about 1 month..." Immediately, all other heads turn to glare at this upstart that dares question the value of writing code to build amazing apps. How dare he suggest that we use out-of-the-box functionality when we can CODE ANYTHING!?

"But...isn't the point to save money and time, rather than spend more of it building something from scratch when we already have the tools to do it?"

It's at this point the FileNet developer has effectively done one of two things: blacklisted himself from future discussions, or raised awareness about a tool nobody realized was available. While the former is more prevalent, let's be optimistic and assume the latter.

It goes down to the need to code, versus the desire to code. Coding takes time - a lot of time. If there's an application already available to do the job within an hour or so, does it make sense to write code for a month simply because you are used to coding everything? Or is it a control issue, where you want control over 100% of the experience? Have you questioned the underlying reason for wanting that level of control or feeling it to be necessary? Most important, have you considered the support?

Support is so often overlooked it's silly. When a custom built application is presented, it depends on extensive documentation from the analyst and developers to make sure that support personnel have everything they need to keep the users happy. Often there are defects that get missed in the first round of QA (imagine that) and are eventually uncovered by the users. These get logged as tickets, researched and corrected, and often documentation needs to be updated. Who is on tap to keep documentation current when these changes happen? More importantly, how are the tickets managed and visible to all parties to make sure that everyone is aware of the types of problems users are experiencing?

The most important question: Are the problems users are experiencing a side effect of the control issue I talked about before?

In an out-of-the-box application situation, especially if the application in question is used by thousands of users on a regular basis and has been in existence for a good period of time, true defects have already been fleshed out and corrected. Most of what is identified is preferential to the client, the user, or the IT staff and not a problem of the application. Delivery of functionality is faster, because the company is not tethered to a development lifecycle.

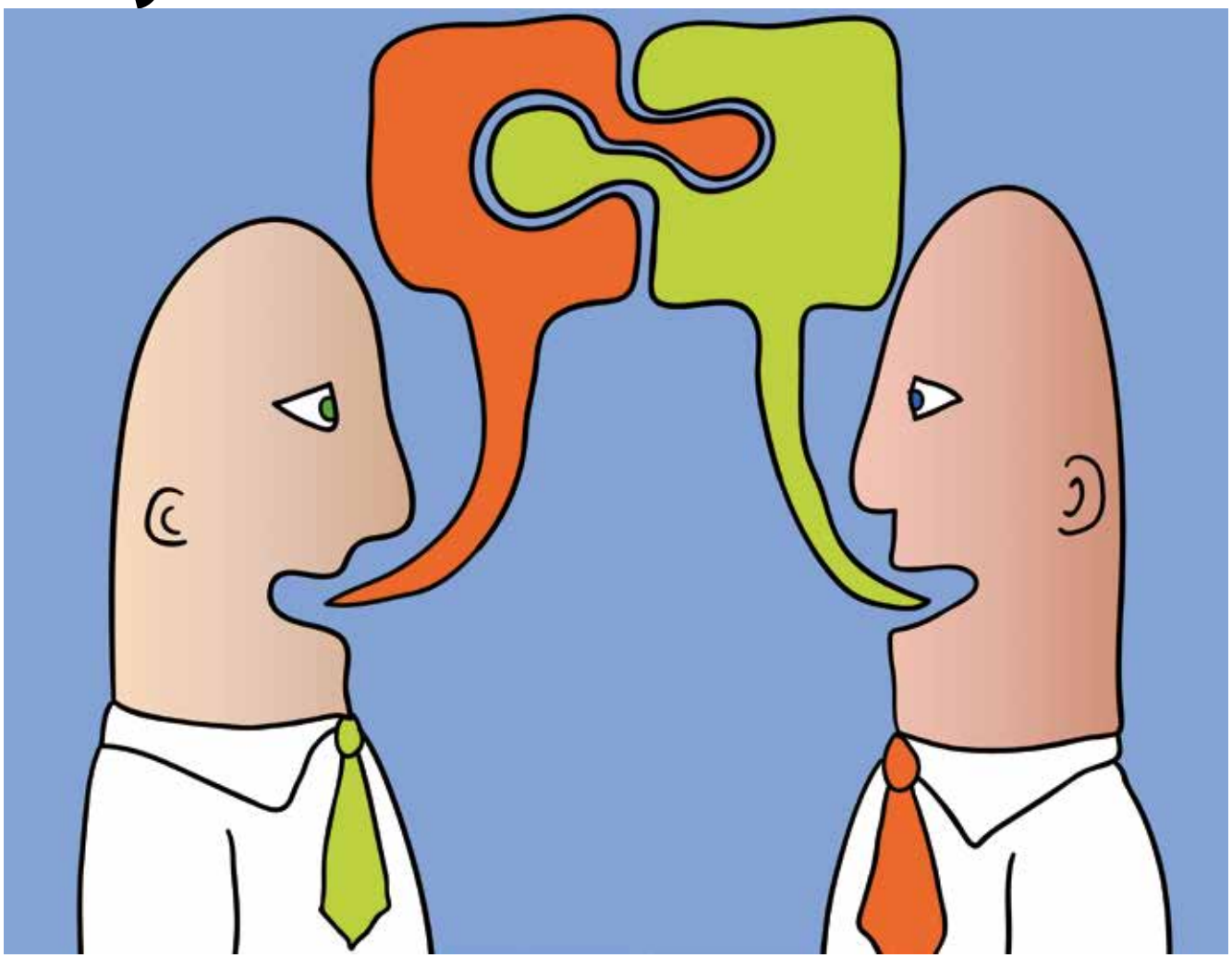
Time and place

So when and why would I use code? As I said, when I have no choice. Say I wanted to display data from my line of business (LOB) application in text on a Web page after authenticating a user. Disregarding the fact that very few LOB applications support customer facing portals, there are security implications to it that can only be overcome with code. The authentication layer also must be developed, and for any stored data, database development is necessary. There are out-of-the-box customer portals available, but they are often generic and not capable of transactional data exchange. Another example would be where a bridge between two systems is necessary. A good example of this is with online colleges that use hosted email; they will write custom code to call the hosted solution API to display information back to the student. Could the student just log into the hosted environment? Yes, but if the hosted environment is using a shared security credential, custom code is required to handle the handshake properly (the student would not be able to give the credential directly).

It's all subjective though, and certainly everyone has their own opinion about it. Mine is this: with ECM in particular, consider whether you absolutely need to write code to get the job done. Take the time to investigate the tool and decide if you can achieve your objectives with what you've already got.

Marcus Christian is a Senior Consulting Software Engineer at Blue Slate, a business process management and technology solutions firm headquartered in Albany, NY. Contact him at Marcus.Christian@outlook.com

Why JSON is better than XML



By Amandeep Singh

The world's digital infrastructure is currently characterized by a plethora of data interchange formats. It's not the least bit surprising that such a multiplicity undergirds things at the moment. The internet is scarcely a generation old, while the "Internet of Things" and "Big Data" more closely resemble regulative ideals than realities. But I nonetheless believe that there are strong, discernible historical tendencies currently at work in this field, tendencies that strongly favour JSON over others.

Ten years ago, XML was the primary data interchange format. When it came on the scene, it was a breath of fresh air and a vast improvement over the truly appalling SGML (Standard Generalized Markup Language).

It enabled people to do previously unthinkable things, like exchange Microsoft Office documents across HTTP connections. With all the dissatisfaction surrounding XML, it's easy to forget just how crucial it was in the evolution of the web in its capacity as a "Swiss Army Knife of the internet."

But it's no secret that in the last few years, a bold transformation has been afoot in the world of data interchange. The more lightweight, bandwidth-non-intensive JSON (JavaScript Object Notation) has emerged not just as an alternative to XML, but rather as a potential full-blown successor. A variety of historical forces are now converging and conspiring to render XML less and less relevant and to crown JSON as the privileged data format of the global digital architecture of the future. I think that the only question is how near that future is.

I strongly believe that this transformation can be attributed to four broad trends, which I'll discuss in turn:

- APIs (application programming interfaces)
- Big Data
- The Internet of Things
- Full-stack JavaScript

Application programming interfaces

Like it or not, today's web landscape remains heavily siloed in a lot of crucial respects. There's tons of information out there that you will never, ever be privy to (and this extends beyond things like authentication information that should be secret in principle). But beginning with companies like eBay in the mid-oughts, APIs have come along as a kind of de-siloing force. This has created a scenario in which organizations like Twitter, Facebook, LinkedIn, and millions of others

(a) essentially offer information-based services in exchange for data, and

(b) increasingly have an interest in opening up a wide variety of information to third parties. A lot of that data never sees the light of day (hence the silo metaphor). APIs are a force to be reckoned with, and changes in that space leave a mark on the rest of the web. There isn't a lot of hard data on XML vs. JSON usage in APIs, but sources like Programmable Web and others strongly suggest that XML is still a major player in the world of APIs, but that JSON's star is rising fast. Twitter's API went JSON-only almost two years ago. Foursquare has followed suit.

Big Data

The rise of JSON as a key player in database technologies is another bad portent for XML. As it stands, Big Data does not have a preferred data interchange format per se. But the claim that I'd like to make about Big Data and JSON is a bit more specific. What I'd like to argue is that JSON is emerging as a preferred format in web-centric, so-called "NoSQL" databases. These are databases that are

(a) intended to accommodate massive scalability,

(b) designed to deal with data that often does not seamlessly conform to a columnar/relational model, and

(c) to be web-oriented at their very core.

The most well-known examples of databases of this sort are MongoDB, CouchDB, and Riak. All three are JSON-based, horizontally scalable, and deeply web-driven.

Other examples abound: the architecture of Amazon's DynamoDB is entirely REST/JSON. Neo4J, a graph database that really confounds a lot of our thinking about what databases are all about, has a REST/JSON API, with no corresponding XML support. HBase's REST architecture currently supports XML, but that support is on the way to deprecation.

For some time now, it has been possible, via various means, to feed queries into MySQL and get JSON back (there are plenty of ways to do this, but MySQL 4.1's AS json command is surely the most handy). The same goes for Postgres and other columnar databases. But MySQL, Postgres, and the others were not constructed with JSON as a fundamental building block.

For Postgres, this will soon be changing. In version 9.2, Postgres added support for a JSON data type, which will "allow for hybrid document-relational databases which can store JSON documents, and JSON functions which convert array and row data into JSON" (quoted from this article). Although Postgres has had an XML data type for some time, this change strikes me as a not-so-subtle acknowledgment of the rising importance of JSON.

There are a few databases out there that are XML-based (such as MarkLogic, but there isn't any movement in this sphere analogous to what we're seeing involving the rapid adoption of JSON-based storage models.

The Internet of Things

Movements in this sphere are more difficult to discern than in the other spheres I've mentioned. The Internet of Things remains an idea, albeit a powerful one. It remains far too unrealized to be able to make claims about ideal or even preferred data formats. The internet is basically a whole bunch of computers hooked up to a handful of things.

But it deserves mention that JSON has begun to establish a toehold in this realm. There's a library for using JSON on the Arduino. It is argued in the book "Architecting the Internet of Things" (p. 102) that "JSON is better adapted [than XML] to devices with limited capabilities such as smart things. Furthermore, it can be parsed to JavaScript objects. This makes it an ideal candidate for integration into Web Mashups."

You can construct LED gauges running on JSON. Your next thermostat might run on JSON.

We haven't yet reached a point where you can look around at a densely interconnected world of objects and almost feel the JSON coursing through the air. But who knows?

Full-stack JavaScript

In addition to the three forces mentioned above, there is one more deserving brief mention: JavaScript is the new hotness and that probably won't change anytime soon. node.js has gone mainstream and the community surrounding it is rabidly productive, new client-side JavaScript libraries are coming along every single day, JavaScript is already the *lingua franca* of the web, etc. To say that the people involved in this growing branch of the web dev world prefer JSON to XML is more than a wee bit of an understatement.

Sure, there's an XML parser for node, but it's largely geared toward dealing with legacy XML-based endpoints. The fact remains that if you're doing top-to-bottom, full-stack JavaScript, using anything besides JSON is borderline silly. And full-stack JavaScript has already gone mainstream.

One way or another, the future is bright for JSON.

It would be quite surprising if the above-mentioned tendencies had nothing to do with JSON itself. Many have argued that JSON is better because it's less "verbose" than XML, and more readily intelligible to humans than formats like pure binary.

These factors have certainly helped JSON. Some believe JSON's rise has to do with the fact that JSON possesses a very limited set of data types. It's essentially restricted to null, Booleans, numerics, strings, arrays, and dictionaries. It doesn't even have a Date data type. JSON is thus not only generally less verbose than XML: it is more parsimonious in its use of data types.

Restricting itself to primitive data types makes JSON deeply and immediately interoperable with pretty much any programming language that exists out there (in fact, the list of languages on JSON's main page is frankly staggering).

Overall, my claim isn't really as audacious as it might seem at first. It basically has two components:

(1) in order to have a global digital infrastructure, you need have pervasive data interchange formats to knit everything together and establish intelligibility across nodes; and

(2) there are good reasons to think that JSON will someday hold a privileged position in our digital architecture. Our expectations and skill sets should register this change and adjust accordingly.

Amandeep Singh is Principal Software Engineer at QASource in Chandigarh, India

Kodak Alaris updates desktop scanners

Kodak Alaris has launched updates to its document scanners. Improvements to the i2420, i2620 and i2820 models, which build on the i2000 Series platform, include the ability to read barcodes on scanned pages to provide information to applications and databases. The new models also feature larger input trays and faster scanning speeds.

The high scan image quality means information is captured clearly for more accurate OCR, and integrated Perfect Page technology corrects image imperfections to minimise the need for rescanning.

With the inclusion of KODAK Capture Pro Software Limited Edition, users can test the application and upgrade to the full version if they need to address more complex batch scanning requirements.

Kodak Alaris has also added performance enhancements and a new model to its i4000 Scanner family. The refreshed i4250 and i4650 Scanners and the new i4850 Scanner offer a larger control panel which provides a clearer view of scanner status and menu options to empower users to quickly resolve issues.

The new control panel enables users to identify problems such as multi-feeds directly on the scanner, eliminating time spent moving from scanner to PC, and improving overall productivity. Other enhancements include:

- Advanced barcode reading, which enables the transmission of data directly into business applications;
- Increased throughput to power through big jobs at speeds up to 150 pages per minute (PPM) and handle high volumes up to 125,000 pages per day;
- Intelligent Document Protection (IDP) with sensors that detect staples, paper clips or other blockages to avoid potential document damage;
- Intelligent Imprinting with patch counting that helps organize large multi-batch jobs and eliminate interruptions;
- Perfect Page imaging technology, which delivers crisp, clear images regardless of the document's original condition and makes additional processing functions, such as optical character recognition (OCR), easier and more accurate; and
- KODAK Capture Pro Software Limited Edition (LE).

www.kodakalaris.com

Nuance AutoStore 7 and eCopy 5.4

Nuance Communications Australia has announced the introduction of new versions of its capture software products, Nuance AutoStore 7 and eCopy ShareScan 5.4.

In their latest incarnations, AutoStore and eCopy address two categories identified as business process capture workflows and collaborative capture workflows.

AutoStore 7 is best suited for business processes and capture workflows where participants submit documents and data into a predefined workflow. The interface has been enhanced for speed in capturing critical document information with as little interaction as possible using realtime connections to business systems for rapid and error free processing.

New features include:

- Enhanced security and compliance – Through dynamic text redaction, AutoStore enables organisations to protect sensitive information without actually searching for any data on the image file. The software matches data on the image file against a specified dictionary and automatically redacts matching data, enabling the organisation to more effectively protect personal information and meet compliance demands.
- Fast and easy image enhancement
- Business process simplification – A standard interface for scanning and printing, new and updated Document Management System (DMS) routing components, a new Forms Overlay component and greater flexibility when routing to RightFax all provide the ability to reduce complex operations into greatly simplified workflows at the touch of a button.

eCopy ShareScan 5.4 is best suited for collaboration work streams where team members, bound by a common goal, such as a project, contribute documents and content to the team for further review and enrichment.

Collaboration work streams involve editable and portable documents delivered to shared document repositories such as network folders, Microsoft SharePoint, document management systems, and cloud storage systems, or direct to team members, vendors and customers through email.

eCopy ShareScan 5.4 adds new features such as:

- Simultaneously select options and enter data while the MFP is scanning with the new work-while-scanning feature. Combine multiple, long documents, more efficiently. Further, the optional document preview function enables users to merge multiple documents into a single document, check small defined areas with SmartForms and validate work before they leave the MFP.
- eCopy Office, Suite and Enterprise now includes the option for the eCopy Cloud Pack offering direct and secure scanning capabilities to Microsoft OneDrive, Google Drive, and Dropbox.
- New SmartForms automatically drive error-free collaboration processes that require document information and data for successful completion right at the MFP.

www.nuance.com

A2iA Mobility adds Australian version

A2iA, a developer of software for the data capture and document processing, has released a new version of A2iA Mobility V3.0, its patented software toolkit dedicated to offline mobile data recognition and image analysis.

In addition to its new patent-pending Auto-Locate feature, A2iA Mobility V3.0 includes a new Australian country version to add to its global footprint.

The new Auto-Locate feature allows the user to capture an image of a document, check or ID without any interaction or pressing of the camera's shutter button. By automatically detecting a document within a video stream and taking the photo, there is no bounding-box or pre-defined zone required – as long as the document is shown on the screen of the mobile device, A2iA Mobility will intelligently locate and capture the image.

Applicable to various document types including checks, identification documents and other forms and documents, A2iA Mobility is available for integration into iOS 64-bit and Android apps, and performs all processes locally, without cellular service or Wi-Fi for real-time

www.a2ia.com

Elasticsearch and SharePoint

BA Insight has launched Elasticsearch for SharePoint, described as out of the box software to integrate Elasticsearch with SharePoint and allows Elasticsearch to be accessed through SharePoint portals without reliance on custom software development. In addition, BA Insight's complete software portfolio is now available for the popular open source Elasticsearch, Logstash, and Kibana (ELK) stack.

For organizations using SharePoint, this adds many powerful real-time search and analytics capabilities that are not possible with native SharePoint while saving time and money on the development of portals to access Elasticsearch applications.

This integration deepens the partnership between BA Insight and Elastic (the company behind the ELK stack). Elastic customers can now easily surface their applications in corporate portals.

The integration also adds a wide range of capabilities to Elasticsearch:

- Connectors: to over 50+ systems, including item-level security
- Auto-Classification: to power better facets and joins with highly relevant, automatically-generated metadata
- Federation: to mash-up queries and results and present them cleanly in SharePoint using a powerful federation framework
- Applications: pre-built search applications including Smart Previews, Visual Refiners, InfoSites, and Matter Comparison

"Combining Elasticsearch and SharePoint opens up a world of exciting applications for our customers, ranging from geosearch and pattern search through search on machine data, data visualization, and low-latency search," said Jeff Fried, CTO of BA Insight.

BAinsight.com/elasticsearch

nQueue introduces iA Scan Desktop

nQueue has announced the release of iA Scan Desktop to allow legal and other professionals to easily and properly route scanned documents to a personal folder, email address or document management system, whether the scanning is done personally at a desktop scanner or remotely at a multi-function device or copy centre.

iA Scan Desktop automatically notifies the user with a pop-up window on the desktop whenever a document is scanned to that user's folder.

With just a few clicks, the owner can choose the electronic version's format and destination. Because iA Scan Desktop leverages nQueue's Adaptive Intelligence technology to anticipate the most likely client/matter detail and favourite destinations, documents can be properly routed with just a few clicks.

Users can select from among the following document formats: Microsoft Word (DOC), PDF, PDF/A, Searchable PDF (OCR), JPEG and TIFF. Users can instantly route documents to the correct location in a document management system, desktop or personal folder, to another party via e-mail or to a network folder.

iA Scan Desktop allows formatting and routing of documents with just a few clicks. When a document is scanned, a pop-up window appears, asking the user to choose whether to route the document, delete it, or take action later. The user then previews the file, enters the client and matter information (or selects it from a list of favourites) and selects the format and destination. The entire process only takes a few seconds.

www.nQueue.com

RAVN launches AI technology

RAVN Systems, a UK specialist in unstructured data processing, has announced a new product range powered by its Applied Cognitive Engine (RAVN ACE). ACE brings together different technologies from the fields of Information Retrieval, Cognitive Computing and Artificial Intelligence in a solution which can be delivered either on-premise or as a hosted service.

The company says the era of simply searching and finding documents has passed and the challenge now is how to extract and distil the information held within documents, emails and other unstructured content. With the exponential growth of corporate data, IT solutions need to go beyond merely finding the most relevant documents a user might be interested in.

It says there is a need for a solution that reads, interprets, summarises and finds the most relevant information contained within this content as well as enforcing policies about data retention and data loss prevention.

www.ravn.co.uk

Simple iD ServicePoint365 PRO

Australia-based technology services firm Simple iD has turned to ServicePoint365 PRO as a way to offer its clients additional value for their Office 365 or SharePoint investment.

"The Microsoft Office 365 platform is gaining tremendous market share in Australia for business-class email and collaboration. ServicePoint365 PRO gives us the ability to offer clients a ready-made environment so they can better leverage the SharePoint Online solution within Office 365," said Aaron Leonard, Sales Director at Simple iD.

ServicePoint365 is an Office 365 SharePoint App designed for the Projects and Services industry with an intuitive user interface and information architecture that organises content into a structure that makes sense and takes the guesswork out of where information is created and stored.

The solution consists of a number of "Centres" that are pre-configured for Company Intranet, Client/Prospect Management (CRM), Project Management, Proposal Management, Resource Management, Process Management, Knowledge Management and Vendor Management.

Users simply apply ServicePoint365 to their Office 365's SharePoint Online environment and immediately start managing and collaborating on critical information in a secure, stable and easy-to-use environment.

http://cloudag.com/servicepoint365/

Altitude IG enhances search functionality

Sherpa Software, a provider of information governance and eDiscovery solutions, has announced an update to Altitude IG that introduces several new features for the eDiscovery, Reporting & Analytics and Administration modules.

Sherpa Altitude IG provides a single location for IT and legal to organize and automate its eDiscovery and policy enforcement initiates.

In addition to several performance enhancements, multiple features have been added to enhance Sherpa's Altitude IG eDiscovery search functionality, including:

Searches can be configured to return the full text of a portion of the search results set. When creating a search, the number of full text results to return (between 100 and 1,000) may be specified. Altitude agents will randomly return the full text for this number of results for review in the console.

Exceptions are now recorded for items that could not be searched. These exceptions are noted in the search results and can be collected.

An Include/Exclude option for particular file type criteria has been added to the eDiscovery search wizard.

Searchers are now able to specify size of the keyword snippets of up to 1000 characters to be displayed in the search results grid.

System notifications have been enhanced to provide more details for eDiscovery related tasks.

www.SherpaSoftware.com

Scalar i6000 library doubles density

Quantum has announced new enhancements to the Scalar i6000 tape library, doubling drive density to provide what is claimed to be the most compact LTO storage footprint in the enterprise market, adding unique RESTful web services management capabilities and offering 80 PLUS certified power supplies for efficient power usage. T

The new Scalar i6000 design doubles the number of full-height LTO drives that fit into a 19-inch rack footprint, for twice the performance or data access within the same footprint.

Quantum plans to expand Scalar i6000 capacity further in 2016, scaling to more than 15,000 slots, or more than 225PB, in a single system.

The addition of RESTful web services enables Scalar i6000 users to automate configuration and administrative tasks - anything that can be done from the graphical user interface can now be done via web services. The user interface has also been dramatically simplified with a new streamlined layout designed to reduce clicks and display information more efficiently and concisely.

www.quantum.com

ediscovery for Instant Messaging

Recommind has announced Axcelerate 5.5, the latest version of its cloud-based eDiscovery platform. Axcelerate now enables analysis of instant messaging (IM) data with smart processing technology that can be applied to a wide range of platforms, including Instant Bloomberg, the dominant messaging platform for the global financial industry, Skype and Google Chat.

The new release, which also features faster performance levels, applies Recommind's analytics, visualizations and machine learning technology to chat communications, along with email and other critical data sets.

The rise of IM in the workplace makes fast, effective analysis of chat data essential to eDiscovery and internal investigations. Legal teams have routinely struggled to find the information that matters among large volumes of chat communications across organizations.

Axcelerate's new chat processing technology and analytics streamline the process of filtering, reviewing and producing IM data. In addition, Axcelerate's Hypergraph technology provides deep insight by visualizing IM data alongside email for a complete picture of communication networks, patterns and activity levels.

Other enhancements in the latest version include:

- Documents at double the speed: Axcelerate 5.5 retrieves batched documents twice as fast with its newly upgraded, zero-footprint viewer and optimized memory utilization.
- Deeper visibility: Axcelerate 5.5's new Multi-Matter Dashboard provides visualized key metrics for firms and corporations to optimize processes across their eDiscovery portfolios.

www.recommind.com

nQueue upgrades iA Enterprise Platform

nQueue, the provider of cost recovery and document scanning and routing technology, has announced the release of iA Enterprise Platform version 3.0, iA Route version 3.3 and iA Workflow 2.0. iA Enterprise Platform is the "engine" behind all iA products, with all captured data routed through it for cost recovery, reporting and routing to all leading document management systems. Version 3.0 includes significant security enhancements, patches some reported issues and adds new functionality.

iA Route powers nQueue's scan interface, iA Scan Manager, to allow firms to automatically capture, process and deliver scans directly from their multi-function devices while simultaneously capturing cost information, which can then be used to manage and control costs or recover costs from clients. iA Route automatically delivers scanned documents to a selected destination, such as network folder, email or document management system. Version 3.3 provides an improved QR code generator and additional speed enhancements. It also uses the newest version of the ABBYY FineReader optical character recognition software, revision 5.

iA Workflow provides electronic job submission and tracking. Version 2.0 is a significant improvement over version 1.0, with improved document management functionality and compatibility with OpenText eDocs electronic content management software.

www.nQueue.com

Prizm adds Annotation Layering

Accusoft has announced the release of Prizm Content Connect v10.3, featuring the addition of annotation layering. This release also includes enhancements to current features including the Client API, internal document links, document signing and content conversion services.

Organizing annotations in a document can get messy, especially when there is more than one person commenting. With annotation layering, users will be able to more easily manage annotations from multiple reviewers.

Users will be able to assign permissions to view annotations, and each set of annotations will be on a separate layer, allowing users to focus on annotations one set at a time or all at once. This new feature makes viewing and managing annotations easier for both the manager of the document and the reviewers. Enhanced to allow serialisation and deseralisation of annotation objects, anew Client API makes it easier to integrate annotations with client databases.

Internal Document Links now detect internal Office hyperlinks and format them within documents for improved navigation through your document while viewing in HTML5.
There are also improvements in text fields and template design 6to make it easier to add signature lines and dates to your documents.
Converting multi-page documents into TIFF format can be time consuming, and emailing them out for review can get messy. With these most recent enhancement, users will be able to convert full multi-page documents, or specific pages within documents, into a variety of formats including: CAD, HTML, EML, MSG, OFFICE, PDF or TIFF.

www.accusoft.com

AvePoint embeds SharePoint into Office

AvePoint has launched a new tool to enable easy access to SharePoint from within an email, a file, or desktop, known as AvePoint Office Connect

It merges content from Microsoft Outlook, Microsoft Office and Windows File Explorer into SharePoint without having to leave the application interfaces. Co-workers can easily collaborate on key documents, and can extend sharing to users outside the organisation while maintaining content security.

It enables saving content to SharePoint from multiple applications and setting up favourite SharePoint locations. Drag-and-drop emails or email attachments directly from Outlook into SharePoint via a Outlook plug-in, as well as automatically capture Outlook metadata attributes – such as To, From, Date, Subject – to map them into destination SharePoint library metadata fields. When saving content from user in-boxes, desktops, and network drives directly into SharePoint, AvePoint Office Connect enables you to apply metadata upon your content's entry to SharePoint in order to improve the find-ability of information and bolster records management efforts.

www.avepoint.com

Automatic data classification system

Boldon James, a UK-based provider of data classification and secure messaging solutions, has announced the launch of Classifier360.

The Enterprise Classification System combines user-centric and automated data classification techniques to deliver a flexible approach to classification.

Recent findings from a Bloor Research report revealed that data classification is ranked in the top three most important security controls for organisations and is recognised as a key part of a successful security approach. Each organisation has different classification requirements dependent on the culture, compliance requirements, business processes, user's technical skills or technologies deployed.

To address this, Boldon James has developed Classifier360 to enable businesses to blend user-driven and automated classification techniques based on the maturity of their security policies and flex the solution as their approach to classification develops.

Classifier360 brings together four classification techniques:

- User-Driven Classification - empowering the users to make business-centric classification decisions
- Recommended Classification - in which users are offered an intelligent default classification label based on rules linked to data and user attributes and
- Prescribed Classification - automated classification of the data without user involvement
- User-Endorsed Classification – supplements any of the previous classification techniques by applying classification labels that require additional user validation before being regarded as authoritative – for example to support a workflow for the approval of specific sensitive information

www.boldonjames.com

Quantum adds LTO 7 Drives

Quantum has announced plans to make LTO Ultrium format generation 7 technology available in its Scalar and StorNext AEL tape libraries.

The latest generation of LTO tape offers a low-cost, highly energy-efficient, long-term storage solution for companies struggling to manage the massive growth of unstructured data and maximize the value of their digital content.

The new LTO generation 7 specifications more than double the tape cartridge capacity from the previous generation, to as much as 15TB per cartridge, providing more cost-effective, long-term retention of data.

In addition, with tape drive data transfer rates of up to 750MB per second, or more than 2.7TB of data an hour per drive, LTO-7 systems will enable large files to be transferred more quickly.

Quantum claims the LTO-7 technology enhancements will offer use cases, including:

- Media and entertainment: Through Quantum's StorNext scale-out storage platform, broadcasters, post-production facilities, sports teams and other content owners will be able to retain and remonetise more of their video data, most notably the increasing volumes of 4K video.
- Video surveillance: Law enforcement agencies, retail outlets, port authorities and others challenged by the adoption of new higher resolution cameras and the need to retain data longer for compliance and analysis purposes will be able to leverage LTO-7 tape as part of a tiered storage approach to make video surveillance storage affordable and accessible.
- Data centre archives: With LTO-7 technology, IT professionals dealing with the surge in unstructured data will benefit from the ability to move more data off primary storage to a robust archive, resulting in improved, lower-cost operations.
- Long-term data retention: LTO-7 technology will provide organizations with the most economical option for retaining data to meet compliance and regulatory requirements.

LTO-7 technology is scheduled to be available in the Scalar i6000 and Scalar i500 libraries in December, with other platforms following, subject to compliance verification.

www.lto.org

Storage for Petabyte archives

Spectra Logic has unveiled a new NAS disk platform designed to provide high-density bulk storage for reliable, high-capacity digital preservation, at costs as low as AU15 cents per gigabyte raw.

The new Spectra Verde DPE (Digital Preservation Enterprise) appliance utilises a new technology for disk storage known as Shingled Magnetic Recording (SMR)

Conventional hard disk drives record data by writing non-overlapping magnetic tracks parallel to each other, while shingled recording writes new tracks that overlap part of the previously written magnetic track, leaving the previous track thinner and allowing for higher track density. Thus, the tracks partially overlap similar to roof shingles.

With SMR technology and Spectra's implementation of ZFS software RAID, the Verde DPE appliance is claimed to provide unmatched data integrity with RAID Z3 triple parity, automatic rebuild to global spare drives, continuous data checksum, and asynchronous replication.

Key Features of Spectra Verde DPE include:

- Digital preservation for enterprise as low as AU15C/GB raw
- Expandable to 7.4 PB raw in a single rack
- Triple-parity RAID Z3 with continuous data checksum, pushing probability of data loss to 1 in over 2 million years when properly monitored and maintained
- CIFS and NFS interfaces included; NFS acceleration kit available as an option
- 1 GB per second in bulk storage applications

www.spectralogic.com/dpe

ECM solution for IBM i users

SoftLanding Systems, the IBM i software division of UNICOM Global, has announced the launch of an enterprise content management solution that quickly transforms existing system output from IBM i business applications to work with digital channels such as the web, mobile and email.

The Columbus software, developed by Macro 4, the specialist document management division of UNICOM Global, is now available for the IBM i platform as part of the SoftLanding solution portfolio.

Columbus unlocks access to a wide variety of business content to improve service, raise productivity and enhance collaboration. The software can be implemented on IBM Power Systems running IBM i, AIX or Linux, without disrupting existing IT systems or applications and requires no specialist development skills. With Columbus, IBM i users can have new digital initiatives up and running in a matter of weeks.

Columbus is a system that takes output from existing applications, automatically transforms it into new digital formats - with the ability to enhance the look of newly formatted documents - and presents it within an in-built online portal. The portal permits secure web and mobile access for an organization's internal staff, customers and business partners.

Asia-Pacific & Oceania distributor is VALOK Global Midrange Software Solutions

www.valok.com.au

PEOPLE & INDUSTRY

Colligo, a Canadian developer of email and records management solutions for SharePoint /Office 365, has opened a new Asia Pacific office in Melbourne, Australia. **Frankie Pope**, former systems and operations manager at Colligo, will take on the new responsibility of regional manager.

Most recently, Ms. Pope headed up the systems and operations team at Colligo, applying her 12 years' experience in IT where she has concentrated on application design, development and implementation. Prior to that, she restructured the Colligo customer support group to meet the needs of a growing customer base. Previous to Colligo, Ms. Pope gained her SharePoint experience as one of the central administrators for SABMiller, supporting 70,000 users worldwide. She has also worked for the National Health Service (NHS) in the UK and for Skanska, a multinational construction company.

Clarizen, a supplier collaborative work management software, has announced its new Australian office, expanding its global footprint in the Asia Pacific (APAC) market. Clarizen also named **Gary Rubinstein** to lead the region as Country Manager, Australia and New Zealand. Gary reports to Guy Shani, vice president of strategic alliances and Asia Pacific Japan, based in San Mateo, California. Most recently, Rubinstein served as group manager and national practice principal at Revolution IT, a Melbourne-based application lifecycle management consultancy that serves the Asia Pacific region.

Global technology company **Lockheed Martin** has appointed a new vice president & managing director to lead its technology business in Australia and Asia. **Christine Zeitz** will serve as regional lead of the company's Information Systems and Global Solutions (IS&GS) business, which provides information and communications technology solutions to customers in the public, security and defence sectors. Ms Zeitz arrives following a career spanning 25 years with BAE Systems, where she held a variety of senior roles across the company, most recently as president of the North East Asia region.

Brother International has signalled its intention to climb further up the food chain in professional imaging workflow following the launch of two new desktop scanners and with plans for further development of scanner technology in the works.

July 2015 marked the debut of two new desktop scanners for high volume scanning, the PDS-5000 and PDS-6000 at $A1399 and $A2199 respectively. Both USB attached devices, the PDS-5000 is rated at 60 pages per minute and the PDS-6000 is rated at 80 pages. Brother's desktop scanner range is presently supplied with basic Omnipage OCR software out of the box, however the company is moving to partner with ABBYY to supply the FineReader 12 Professional OCR package in the future.

Brother is looking to expand beyond the SMB market, where it is a major player in printers and multi-function Centres (MFCs), and concentrate on growth in the data management space as well. The company has inked a deal with professional distributor Alloys which is now offering the Brother desktop scanner range and is already making inroads into the local market.

"We are keen to talk to dealers, resellers and system integrators that wish to employ these enhanced compact scanners into document capture workflows for businesses in a range of industry sectors," said Luke Howard, Brother International Australia's Commercial Market Development Channel Manager.

"We have developed our range to easily drop into existing workflows by offering broad compatibility by hooking into TWAIN, SANE, ISIS and WIA drivers. No matter which scanner you use today, you can upgrade to a Brother scanner with ease".

To help support its retail partners and develop a stronger scanning profile in the Australian market, Brother International Australia, is providing the expertise of its Commercial Solutions team in Australia to support solutions providers and resellers handling its dedicated scanner products with technical backup and advice. Brother does not intend to sell direct but instead works with retail partners to tailor solutions to meet the needs of their customers. Through the efforts of the Commercial Solutions team, Brother is looking at finding software partners to create symbiotic packages that provide an all-encompassing 'one purchase' solution for customers.

Brother Commercial Division, Tel: 1300 885 989
Email: corporatesales@brother.com.au
Web: *http://corpsolutions.brother.com.au/*

CONFERENCES & EVENTS

Australasian Enterprise Data Management Conference

October 19-21, 2015 Sydney Luna Park

This specialist data management conference provides a regional forum for sharing experiences, best practices and the latest thinking about managing data/information at the enterprise level.

http://datamanagementconference.com.au

Knowledge Management and Innovation 2015

November 24-25,2015 Rydges Sydney Central

One day case study led forum plus two post forum workshops

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KONICA MINOLTA

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*Source: Gartner ^Source: Bae Systems