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Can FOI access PM's private email?

Is private email used by government ministers or prime ministers accessible to Freedom of Information (FOI) requests? Malcolm Turnbull's office is only certain that this may possibly be the case. Experts are even less sure. The issue has risen in prominence considering extensive debate over Hillary Cinton's use of a private email server during her time as US Secretary of State

Following Mr Turnbull's defence of his ongoing use of a personal email domain, IDM sought some expert opinion from specialists in the field.

Mr Turnbull's office has issued a statement saying "All communications or records of a minister which relate to his or her duties are (subject to many exemptions) potentially subject to FOI whether it is on SMS, a private email server or a government email server".

Melanie Olynyk, a partner at national law firm Maddocks, has extensive experience acting for government clients, including local government, state government and statutory authorities. She specialises in governance and administrative law, and has appeared or instructed in numerous proceedings before VCAT and the Supreme Court in a range of areas, including freedom of information, privacy and valuations.

"It is correct that the concept of 'possession' is important in both records management and FOI. When documents are in the possession of an agency, they can be accessed through FOI," said Olynyk.

"This extends beyond 'actual or physical' possession to what is known as 'constructive' possession. That is, a right and power to deal with the document in question, or an immediate right of possession. So, for example, an agency will be in constructive possession of documents where the documents have been created by someone in their 'official' capacity and capable of being reproduced by the agency. In this context, provided the SMS or email can be reproduced by the agency (e.g. downloaded, printed, etc) and it relates to 'official' business, it would be subject to access through FOI.

"From a practical perspective, this might not be possible to do with emails located only on a private email server."

$US1B to digitise a single form: WSJ

The Wall Street Journal has reported that despite an outlay of $US1 billion and a decade long effort to digitise 100 paper based forms used to process applications to immigrate to the US, only one has successfully been implemented.

It describes the application system, run by U.S. Citizenship and Immigration Services as "archaic" and "error-filled.

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The project to replace the paper forms was initially costed at $US500 million and due to end in 2013. That timetable has now moved to estimated completion in 2019 at a total cost of up to $US3.1 billion according to the WSJ.

"The sole form now available for electronic filing is an application for renewing or replacing a lost "green card" — the document given to legal permanent residents. By putting this application online, the agency aimed to bypass the highly inefficient system in which millions of paper applications are processed and shuttled among offices. But government documents show that scores of immigrants who applied online waited up to a year or never received their new cards, disrupting their plans to work, attend school and travel."

"You're going on 11 years into this project, they only have one form, and we're still a paper-based agency," said Kenneth Palinkas, former president of the union that represents employees at the immigration agency. "It's a huge albatross around our necks."

IBM expands power of Watson Analytics

IBM has introduced new data discovery and question-and-answer capabilities for Watson Analytics that promises to make it easier for users to extract insights from their data. IBM also announced widespread adoption, with half a million professionals registering for the Watson data exploration and visualization service since its introduction less than a year ago.

Watson Analytics now allows users to bring more external data sources to a business question, helping to ensure the right data is collected and curated to add context, depth and confidence to every decision. This includes access to data from IBM DB2, IBM Informix, IBM Netezza, IBM SQL Database, IBM dashDB and popular third party data sources.

The ability to securely connect to corporate data from the cloud is being enhanced with a new functionality from IBM's cloud-based data refinement and access service, Dataworks. The new capability calls on Secure Gateway technology to establish a tunnel between the user's on-premise databases and Watson Analytics, automatically encrypting data, and using Docker containers to transport it through a dedicated connection to allow for secure analysis.

Citrix gains high level security rating

The Australian Signals Directorate (ASD) has approved the use of Citrix Worx Mobile Apps for up to PROTECTED level communications in Australia, making Citrix one of the few vendors in Australia able to provide assurances to government departments they can securely access and email official and classified information and systems from a suitable mobile device.

The ASD approval means Citrix's secure mail, web and file sync and share clients on an approved iOS platform can be configured for government use for up to PROTECTED level environments. As a result, public sector XenMobile users can easily classify emails and send these over encrypted networks to control access.

A number of Citrix technologies are already certified for government use, including Citrix XenDesktop, Citrix XenApp and Citrix NetScaler. The new certification adds to this list enabling government departments to implement a full mobility strategy from a single vendor.

"When working toward Citrix's ASD certification, we aimed to go beyond basic regulations to provide an end- to-end security solution addressing the needs of the public sector, and which differed from the competition.

"With the move to the cloud underway and employees demanding to work outside of the office and across mobile devices, government departments can now easily identify Citrix XenMobile as the ideal solution for all their mobile needs without compromising security," said Mark Hazell, Government Manager at Citrix.

Commonwealth sets 2020 target for paperless government

A new set of objectives for information management at Australian government agencies proposes that paper will be completely removed from business workflows by the year 2020.

Launched by Secretary of the Department of Finance Jane Halton, it also proposes this can be achieved without any additional funding from government.

"All agencies will make and record business decisions digitally, using digital authorisations and workflows," states the Digital Continuity 2020 Policy published on the web site of the National Archives of Australia (NAA).

"All Digital Continuity 2020 targets are expected to be achieved as part of normal business reviews and ongoing technology maintenance and investment cycles."

"As the agency responsible for government information and records management, the National Archives will lead the implementation of the Digital Continuity 2020 Policy," said Halton.

The 2020 policy establishes a new set of reporting requirements to follow the NAAs Digital Transition Strategy which states that all records created digitally after 2015 will be accepted for transfer to the National Archives in digital formats only

'Each year the organisation reports to government on the status of digital information management in agencies and recommends further enhancements,' said National Archives Director-General David Fricker.

'The standards within our new policy will become whole-of-government requirements and we're providing agencies with this opportunity to enhance their skills in digital continuity leading up to 2020."

The first deadline set down in the 2020 Policy is June 30, 2016, by which time all Commonwealth agencies must have established information governance committees. The policy also proposes assessment of systems against the standard ISO 16175 and implementation of minimum metadata standards.

The International standard ISO 16175 established in 2006 is a set of functional requirements which explain how organisations can design their business and EDRMS systems to achieve record-keeping compliance

Zombie financials threaten Victoria

The Victorian Auditor-General has found that state agencies are under increasing risk from using IT systems that are past or approaching their end-of-life.

An analysis of financial systems at 45 government agencies found that "While software licensing was generally well controlled, controls to reduce the risk of inappropriate access to IT systems require significant improvement."

"Disappointingly, IT security-related audit findings continue to be raised and again account for the majority of our audit findings. It is also disappointing that our recommendation for a whole-of-government disaster recovery framework has not been addressed since it was first made in 2012–13."

"Of particular concern, in 2014–15, was the limited progress by entities in upgrading end-of-life systems. We found audit findings relating to IT systems approaching end-of-life or past their end-of-life at 53 per cent of our in-scope entities. The majority of these 34 end-of-life audit findings were related to key financial systems, including Oracle Financials. Findings also related to software on users' desktops computers, such as Windows XP."

"Following the November 2014 change of government and subsequent January 2015 machinery-of-government changes, a project to review and implement a whole-of-Victorian-Government enterprise resource planning (ERP) system was suspended. As a result, the financial systems for many in-scope entities are either approaching end-of-life or are past their end-of-life.

"Given the current situation and the time required to implement an ERP system, this issue is expected to remain unresolved for some time.

"As an interim measure, a number of public sector entities have entered into customised contractual arrangements with vendors for the support of obsolete IT software. These arrangements typically come at a significant cost and some vendors increase the cost over time as the use of the program declines globally.

"As an example, a one-year custom support arrangement for Microsoft Windows XP was renewed by a department in April 2015 at a cost of $A2.37 million."

The report also highlights the need for a continued focus on remediating IT security weaknesses. While compliance with the Victorian Government's Identity and Access Management (IDAM) Standard 03 – Strength of Authentication Mechanism v1.0 is mandatory for all departments and 11 audited agencies, our IT audits found a large number of issues related to password controls. Typical audit findings include:

• entities which have not updated their password policies and procedures to reflect the standard's requirements

• password settings implemented on in-scope systems did not comply with the standards.

State Government Departments and central agencies were the major culprits when it came to found weaknesses in Policies & procedures and retention of evidence.

The full report is available at http://www.audit.vic.gov.au/

NZ plans for national e-health record

The New Zealand government has announced plans to build a single, national electronic health record (EHR) able to be accessed via portals and apps running on a variety of devices.

Minister of Health Dr Jonathan Coleman said a report on the benefits of an electronic health record had been commissioned from consulting firm Deloitte which found that there is growing international support for adopting a "Hybrid/Best of Suite strategy for Electronic Health Records, where a 'single' EHR is introduced to join up information held in a smaller number of Electronic Medical Record systems." The Deloitte report will be published on the Ministry of Health website

In a speech to the Health Informatics New Zealand Conference held in Christchurch, Coleman said "As I travelled around meeting clinical leaders, patients and IT providers it became clear that our eHealth system was complicated, fragmented and not as user friendly as it could be.

"As I walk around hospitals I kept seeing examples of where individual clinicians have designed a stand-alone information system or programmes to use in their own unit – we end up with 20 different systems. In my view it intuitively makes sense to have a more uniform It environment with fewer systems, fewer vendors more standardisation and greater functionality."

ediscovery "glossary of terms"

Are you clear on the difference between Native and Tiff Production in ediscovery? Or how about a Native File versus NSF file? A new Production Glossary of technology terms used in the practise of eDiscovery has been released for public comment by the Legal Technology Professionals Institute (LTPI), a US legal tech industry association.

According to the organisation's Web site, "While a number of useful industry-wide glossaries exist, we could not find one that specifically discussed document production, nor one that discussed not only the "what", but also the "why", so we created one.

The glossary is available at https://www.legaltechpi.org/Project-Production-Glossary. It is described as a work in progress and submissions are invited at programs@legaltechpi.org.

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Kofax stays agile under new ownership

Shortly after Lexmar's $US1 billion acquisition of Kofax, Howard Dratler was appointed head of sales with Lexmark's Enterprise Software division and placed in charge of the global field organisation. On a recent visit to the region, IDM got the opportunity to quiz Dratler on the progress of merging the operations of Perceptive Software, Kofax and ReadSoft.

IDM: Lexmark has stated that it is unifying its technologies under one universal Lexmark brand. Where does that leave Kofax and TotalAgility?

HD: We are certainly unifying under the Lexmark brand, but Kofax has certainly a strong brand of its own in the market, 25 years in the making. It's one that we're certainly sensitive to maintaining a presence for a period of time as we take a rational step-wise approach to unifying under the Lexmark brand.

We're not completely eliminating and removing that brand right away and we'll continue to reference it and certainly we'll be careful in terms of how quickly we can move away from it.

At the same time also we put a lot of effort and a lot of energy into making TotalAgility a strong product brand. In fact more of the capability that we now have as a combined organisation will roll up under the Kofax TotalAgility brand as we move forward because we do believe it's very reflective of the capabilities and our philosophy of allowing the customer to become much more agile in their business with our solutions and products.

IDM: Over recent years, Lexmark has acquired an end to end product set from capture to ECM. Is the Kofax TotalAgility platform uniquely tied in any way to the Perceptive ECM? Will it be in the future or is TotalAgility to remain entirely ECM platform agnostic?

HD: That's a good question and I think everyone has similar questions. Are we going to make it exclusive? Kofax TotalAgility can certainly take advantage of Perceptive ECM and there's some really important use cases where it provides a good benefit.

But at the same time each will continue to be sold independently. There's not going to be an exclusive relationship.

We're not going to force that situation any more than we would force a Kofax partner or customer to somehow adopt Perceptive Content.

We'll leverage the best of both, we'll improve our capabilities as a result of those technologies together but we're not going to mandate and we'll certainly allow customers to choose.

IDM: Kofax has a history and a large customer base worldwide; over 20,000 organisations. When Lexmark acquired Perceptive it was seen as natural that Perceptive would target the existing Lexmark MFP and device customers as an extension of what their existing set is. Is there a similar approach for targeting the Kofax customer base for the Lexmark ECM product?

HD: We'll certainly look at the great opportunity we have to cross-sell and up-sell not just the Kofax customer base but the Perceptive customer base. Also into the Lexmark MFP and management service clients as well.

Most customers have a digital repository of some form already. They already have business process management. They already have analytics. They may have multiple content repositories but the reality is that they still have a lot of problems and they still have a lot of pain.

And what we do is we really focus our products and capabilities

"Most customers have a digital repository of some form already ... but the reality is that they still have a lot of problems and they still have a lot of pain." - Head of sales with Lexmark's Enterprise Software division, Howard Dratler.

on solving those pain points that they haven't been able to solve with these other capabilities. So we will continue down that path and we find that to be a very effective approach. We have some unique capabilities that allow us to differentiate ourselves from what customers may already have.

IDM: Has there been any product rationalisation between ReadSoft and Kofax?

HD: We took steps shortly after the acquisition closed to evaluate the ReadSoft, Kofax and Perceptive product sets in terms of where there's overlaps, where there's uniqueness and how we want to position things going forward. I can't say it's 100 percent complete but we've done a lot of work in a relatively short period of time and we've announced the various positioning of those products.

For example, in Oracle ERP environments we're leading with Kofax MarkView. In SAP world, needless to say ReadSoft had a very strong capability with Process Director and we're leading with Process Director in those cases. Perceptive Content, their AP content solution, has connectors for a significant number of ERPs that are outside of Oracle or SAP. So we've got a tremendous amount of coverage now in virtually every meaningful ERP that's out there.

IDM: Kofax boasts more than 850 channel partners globally. Many of these have existing alliances with other ECM vendors. In those cases will you keep using those channels for your Capture and Work Flow software and leave in place with their existing ECM vendor relationships?

HD: Actually when you add in Perceptive and ReadSoft we probably are talking more like 1500 partners on a global basis. We're not forcing anyone to make any dramatic changes relative to other products or technologies that they may currently represent. We're certainly making those Kofax partners aware of the Perceptive ECM.

We are also making them aware of ReadSoft's SAP capabilities. Likewise for the Perceptive partners we're doing the same thing, and for the ReadSoft partners. But we're not forcing them off of something that they may currently have, relative to a competing ECM. We certainly would encourage them, give them a lot of incentives to consider our rich set of capabilities now, and that will continue to be our approach.

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What is SharePoint? Where are we going?

By Colin Cook

My response to the question, "what do you do for a living"? can vary depending on how much patience the person I am talking to appears to have, from "I work in IT", "I build intranets of a sort" to the outright, "I am a SharePoint Specialist."

I am normally then presented with one of two responses:

"Oh SharePoint, yeah I know SharePoint" which is either true, false or mostly somewhere in between not really knowing and not caring.

"What is SharePoint?" is the golden question. Every time a person asked me that question outside of the office I would love to sit them down and passionately let them know what it is and all the magical things it can do, but I think I would stop getting invited to parties.

So what actually is it to those who care: Collaboration? Business Intelligence? Records Management? Information Management? Business Process Management?

The key point is, its lots of things and a lot of other things all mixed in between, ultimately it's a diverse business tool.

Since 2010 I think it has not really been as much the "current state of SharePoint" so much as a current state of mind. To us in the know it's a diverse and powerful tool for any business, however it is more often than not referred to by our users as a complete pain in the a$$. And they are right (aren't they always) for too long too many people have been making SharePoint a begrudgingly steep learning curve for our users or implementing a business critical system which is always going down.

For most of us, if we thought really hard into those suppressed memories, we can remember what we first saw when SharePoint was introduced to us and why we are all such hugely patient people now. For us, we got paid to get past the brick walls. A business user can only see a new unnecessary challenge completely outside the scope of the other day to day rubbish they have to deal with. They are constantly having their attention levels drained far too fast and the poor IT Executives are continually trying to justify the madness to users, the stakeholders and themselves, because let's face it, it did cost a lot of money to implement.

Thankfully this is not a wholly accurate representation, there are of course those of us who spend our time doing what's right for our users, painstakingly working on governance plans, training schedules and improvements to aid adoption. For us though the bad deployments have become an unfortunate and very common sight and the reality is that it's not always the SharePoint team's fault. Pressure from executives, the wrong project team, bad planning and so on, can all add to the difficulties. There will always be a lot of people in any business who want a piece of SharePoint and believe they should have more control over its delivery than someone else.

To make things easier for our poor users we experts can do things like governance, training and adoption plans. Developing/Coding something that makes it all easier is another: a web part, a workflow, a shiny user interface. These solutions can themselves present a whole new and fundamental set of issues. A .Net Developer who doesn't know SharePoint, highly customised and non-upgradeable solutions, badly written back end solutions draining server resources, custom solutions that for some reason badly replace SharePoint standard functionality, unknown and very unfriendly errors to name but a few, we have all seen them. Ultimately our good friend SharePoint over the years has been given an incredibly bad name and mostly through no fault of its own, it's been in a state of growth, almost like a teen fighting through a pubescent phase.

To the future

I have only worked With SharePoint for five or so years but I have surprisingly seen every single version in production. There is hope, I do still believe the future is incredibly bright for SharePoint. Microsoft have been understandably upset that one of their glorious children has been getting a bad rap and they are looking to redeem it. In 2013 we saw some serious modern user interface changes, the previously purchased FAST Search was integrated as SharePoint Search incredibly well and everything was geared up to link with Office365. Apps (now add-ins) were introduced and while they still need plenty of work and investment there is potential. We also saw some serious effort put into introducing JavaScript and REST APIs.

Many of us before 2013 was released had feared that we would be losing the on-premise farm and everything would be bundled into the cloud, where Microsoft can protect its honour, and I don't believe the changes were a coincidental alignment. Luckily for us on-premise remains, I believe this dramatic push was probably reconsidered as it would no doubt have killed the product there and then and most experts would abandon hope. Unfortunately for the doubters of cloud-based SharePoint, it's not over. You only have to look at the large majority of training and Ignite talks that focus on cloud-based, Office365 and hybrid deployments. Microsoft still clearly intend to push us away from on-premise as well as trying to protect the servers from harm by nudging developers into the add-in space and front end development, thus protecting SharePoint's reputation while also bringing it more in-line with modern techniques and languages. Subsequently this will also attract a larger set of web developers into the mix.

As IT experts we all know that we have to adapt to stay relevant, but some people really fail to do so, they get so trapped in the past and how things were in the glory days that they forget to accept a good change when they see one, this is what I hear from an unfortunately large majority of SharePoint experts I meet and see posting on the internet.

Right now with SharePoint its hugely important to adapt, SharePoint 2016 is just around the corner more and more companies are in a good position, from developing better strategies, to keep their deployments modern. It's up to us as the guiding light and flag bearers of SharePoint to promote its new features the right way and use it properly, not get stuck in the past.

What is SharePoint? What can SharePoint be for you?

Colin Cook is a SharePoint Specialist who blogs at http://www.fluid-sharepoint.com/

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Why Yammer is not a waste of time

By Peter Jamhour

Most organisations know they should make it easy for employees to work together and share ideas. As workplaces become more decentralised, employees are needing to collaborate across teams, regions and time-zones to do their jobs well.

But there's a problem. While organisations understand the value of collaboration, they often struggle to implement collaboration strategies that have lasting results. This has a serious impact on business productivity, particularly in Australia.

Deloitte research shows that Australia's business productivity has fallen by 0.6 per cent every year for the past seven years. This means that when it comes to productivity, Australia is one of the world's most underperforming developed countries.

How managers have responded to productivity losses

Managers and executives have been quick to address Australia's productivity slump. Some have introduced flat management structures in a bid to foster collaboration and inspire team members to work more efficiently.

Others have purchased corporate social networking platforms, assuming that effective collaboration is as easy as setting up a platform and waiting for employees to start sharing information. When it's not an instant success, those at the top mistakenly label the platform a waste of time and money.

What these managers and executives don't realise is that these approaches aren't enough to develop a collaborative culture. They can be step in the right direction (flat management structures don't work for all organisations, for example), but employers need to do more to encourage employees to share information and improve transparency.

When employees are spread across regions, work remotely or spend lots of time out of the office, collaboration can seem impossible, no matter how flat your organisation may be.

Corporate social networks, such as Yammer, can help bridge this gap. Contrary to what you might believe (particularly if you've been burned by experiences similar to the example above), corporate social networks are far from a waste of time.

How Yammer can help

Yammer and other corporate collaboration tools aren't just blog sites or work-appropriate versions of Facebook.

Yammer, for example, provides a rich, unified and familiar social media experience that can integrate with your SharePoint environment. We actually recommend that SharePoint users choose Yammer over default SharePoint social tools for a better user experience.

Many of our clients, including The Tax Institute, have used these tools to improve inclusivity, enhance employee engagement and streamline business operations.

The Tax Institute's employees use knowledge forums, social feeds and internal blogs to share knowledge and provide support for projects across divisions. As a result:

- employees are more willing to share knowledge
- barriers to collaboration have been eliminated
- productivity has increased
- Top-down support is vital

One of the main reasons corporate collaboration tools fail is because executives don't consider them to be particularly engaging or valuable. If there's a widespread view in your organisation that Yammer is a waste of time, those at the top are probably,at least partially,- responsible.

Like any major cultural shift, long term success is more likely if employees see buy-in from those above. So when it comes to experimenting with new collaboration strategies and tools, don't be afraid to get your hands dirty.

Peter Jamhour is a Solutions Architect at Professional Advantage, where he specialises in designing and implementing tailored solutions that focus on process automation, document and records management, integration and reporting.

E-signature boost for Adobe Cloud

Adobe has announced new e-signature capabilities in Document Cloud that it claims will make electronically signing documents and contracts easier. New functionality includes a visual drag-and-drop Workflow Designer, digital signatures (a more advanced, secure form of e-signatures) and Enterprise Mobility Management and Signature Capture. Adobe also announced expanded partner integrations with Workday, Salesforce and Ariba, making it easier to add e-signing capabilities to existing HR, sales, procurement, and legal systems.

"Companies are in the midst of massive digital transformation, with a relentless push to streamline all business processes," said Bryan Lamkin, senior vice president and general manager, Digital Media, Adobe. "New e-sign capabilities in Adobe Document Cloud, including digital signatures and breakthrough mobile functionality, will bring a new level of efficiency to core business processes by eliminating the time lag and cumbersome paperwork associated with securing ink signatures."

With the new, drag-and-drop Workflow Designer, visually create workflow templates for senders to follow a consistent signing process. Plus, use new Advanced Workflows to build custom apps and a web experience that automates steps in a business process, like on boarding new hires or finalising a sales contract, before, during, and after signing.

New Document Cloud data centres are planned to be available in Ireland and Germany by the end of this year, part of a global expansion that will continue through 2016. New functionality provides the ability to correct documents "in flight" - when the wrong document has been sent by mistake, simply fix and resend instead of cancelling and starting over.

The eSign Manager DC app now features new functionality, including:

- Enterprise Mobility Management (EMM) - Securely manage employees' Document Cloud mobile apps and devices using Android for Work, or, coming soon, Good Technology and Microsoft Intune.
- Signature Capture - Let employees use their mobile device camera to take a photo of their handwritten signature once, then use it to sign documents again and again.
- Signature Sync - Give employees access to their signature image across web, mobile and desktop experiences with automatic synchronisation. Plus, download and view more stored agreements on your mobile device and find the right one quickly using powerful new search and filter options.

The new Adobe eSign capabilities will become available beginning through early 2016. Users of Adobe Acrobat DC and Adobe Acrobat Reader can now access and take common actions on PDF files stored in Dropbox directly from within the Adobe apps Dropbox users can open, edit, and save changes to PDF documents in the Adobe apps directly from the Dropbox website, iOS app, or Android app. The two companies say the integration addresses a strong need, as PDF is the most common business file type in Dropbox.

Document retention and destruction

By Melanie Olynyk, Maddocks

The new year is fast approaching and it seems timely to remind you of legislation that goes along with a 'cleaning out' of the archives. Before you press delete or shred that document, be sure to exercise diligence in complying with document and record retention requirements. Non-compliance can result in economic loss or even strict criminal liability for individuals and organisations.

There are various legislative regimes in Australia which prescribe specific timeframes for document and record retention and destruction. Non-compliance with such requirements can result in economic loss, such as losing coverage of insurance, or even strict criminal liability for individuals and organisations – the most common example being for a company, its directors and officers. Currently, there are around 80 Acts at both the State and Federal level which regulate document and record retention and destruction. The various regimes are not codified in any way, some are industry specific and some are catch-all legislation. Where there is an applicable regime, care should be taken to ensure that requirements in relation to the form, manner, location and length of time that documents must be kept are complied with.

Where there is no clear legislative guidance as to the applicable retention period, the documents must be kept for a reasonable time, which is usually seven years.

Special regard should be given to documents and records stored in electronic form. Publications such as AS 4390 Australian Standards for Records Management and Australian Standard (AS ISO15489) provide useful guidance for keeping electronic records. There are also individual regimes governing electronic transactions. The applicable Commonwealth and State Evidence Acts and Electronic Transactions Acts set out the various requirements. In addition to the retention period set out in the various regimes, there are additional common law and legislative duties in relation to document destruction. For example s254 of the Crimes Act 1958 (Vic) creates an offence of the destruction of evidence which 'is, or is reasonably likely to be, required in evidence in a legal proceeding'.

On the other hand, the Privacy Act 1988 (Cth) requires that records containing personal information must be destroyed or permanently de-identified when no longer needed for any purpose for which the information may be used or disclosed under the Privacy Act. This means a balance must be struck between retaining documents in accordance with applicable retention periods and destroying them when they are no longer required for any legitimate business purpose.

Document retention policies should also explain how documents are to be destroyed, to ensure this is done in a safe and secure manner.

A table on our Web site outlines some of the more commonly applicable legislative regimes governing document and record retention and destruction, individual research into the regimes should be conducted as retention requirements may change. We recommend organisations be diligent in identifying and recording the document retention and destruction obligations which apply to them.

Melanie Olynyk, a partner at national law firm Maddocks, has extensive experience acting for government clients, including local government, state government and statutory authorities. She specialises in governance and administrative law, and has appeared or instructed in numerous proceedings before VCAT and the Supreme Court . melanie.olynyk@maddocks.com.au

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The biggest mistakes in sharing knowledge ... and how to avoid them

By Julian Maynard-Smith

Before anything else, make sure you instil the following message into your company's culture and never, ever forget it: The purpose of documentation is to transfer the right information to the right people at the right time. Anything that interferes with this objective is at best a waste of time, at worst downright dangerous.

Now, let's explore some other golden rules for minimising pain and maximising knowledge transfer.

Avoid duplicating text

At best, duplicating text increases your maintenance burden because you have two or more versions of the same text to maintain instead of one. At worst, and most commonly, duplicating text wreaks havoc because the different versions get updated independently (or some get forgotten) so you end up with multiple versions of the supposed 'truth'.

In software engineering there's a concept called Don't repeat yourself (DRY) that applies equally to documentation. With a little imagination, you can always avoid the need to duplicate information, eg:

Copying and pasting text within the same document? Use cross-references or 'Insert bookmark' instead.

Creating multiple copies of the same document for versioning reasons (eg Document_v0.1, Document_v0.2)? Use the native versioning of a document management system such as SharePoint instead. Even if you're just using shared folders, you can change the folder system's attributes so that prior versions of each document are automatically captured.

Duplicating the same content across different documents? Merge the documents into one. This works even if you have different readerships for the information, e.g. if you have an 'Overview' and 'Operations' version of the same content you can create a larger document where the 'Overview' content is the opening chapter.

Shorten the reader's journey

If people have to follow a convoluted path to find information (e.g. burrow into a deep folder hierarchy, or search across multiple repositories) there's a risk that either they won't find the information at all, or they'll find the wrong information and assume it's what they need.

According to the principle of least effort, people seek information using the easiest means available and stop looking once they've found minimally acceptable results. Often, enabling people to find wrong (e.g. outdated) information is more dangerous than preventing them from finding it at all.

Here are some ways to shorten your reader's journey:

- Create a single entry point: You know those board maps you sometimes get outside stations and in touristy villages, the ones with a big dot or arrow saying 'You are here'? Your information repository needs the same thing, a home page with clear navigation paths that readers can follow to find whatever information they need.
- Choose flexible searches over rigid hierarchies: Avoid deep folder hierarchies that force readers to bury deep to find the information they want and that give them only one path to finding information. Instead, use the native search/filter/group/sort capabilities of a document management system such as SharePoint, to enable readers to find information according to their own (often highly subjective) search criteria.
- Keep information within reach: e.g. if you're documenting software, create online help instead of separate user guides; or put software installation instructions in a 'read me' file. Similarly, make policies (or at least their URLs) visible from where their target audience is most likely to see them. Even if Human Resources stores all company policies, you'd be wise to add the risk policy's URL to the risk department's home page rather than relying on risk managers knowing they have to visit HR's home page.

Collaborate

Many companies and individuals are resistant to the idea of sharing information, but their fears for doing so are usually unfounded and the consequences severe.

For example, if you hide a document from others 'because it's a draft and I don't want people thinking it's finished', you risk the following negative consequences:

- Hogging information others may be able to complete, needlessly holding up everyone else in the dependency chain for that information.
- Risking 'Chinese whispers' - you don't know the answer to A, so you ask person B who asks person C, who's not really sure but suggests you look at document D - which is out of date, but the only person who knows that is person E (who's hogging a draft with the key information).

If a document is a draft, all you need to do is add the word 'draft' as a watermark, or in the header or footer.

One of the biggest mistakes companies make is instead of storing information centrally so everyone can pull it off when they need it ('pull' model) they send out the information ('push' model), typically and most disastrously by emailing attachments.

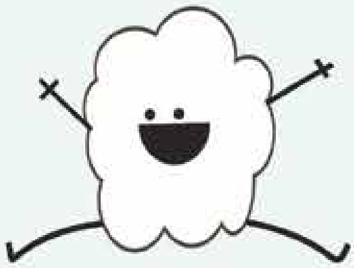
Sending out documents for review, especially when combined with the twin sin of 'versioning by filename', risks comedy capers such as the following:

- The original author creates Document_v0.1.
- Author sends Document_v0.1 to someone else for review.
- Reviewer emails author Document_v0.1_comments.
- ... but - oh whoops! - another reviewer picks up the document and starts creating a version they name Document_vo.2.
- Author gets sent Document_v0.1_comments, but not Document_v0.2 because the other reviewer is still working on it and hasn't told the author.
- Author creates their own Document_v02 from Document_v01_comments, not realising that a different Document_vo2 (see step 4) exists and is being circulated independently.
- The second reviewer has sent their Document_v02 to their manager for approval.
- The manager creates Document_v02_approved but later sees the author'sDocument_v02 and causes a scene because they think their changes have been ignored, not realising it's a different Document_v0.2 from the one they updated.
- Much confusion as the multiple versions are hunted down.
- The author creates a merged document called Document_v03, only unbeknown to the author...

To avoid such needless pain, keep documents stored centrally, in the same place and with the same name. As mentioned earlier, the best way to manage versions is using the native versioning of a document management system, especially as a DMS provides further advantages such as check-in/check-out capability to enable the integrity of a single master version of each document to be maintained at all times.

Even if your organisation isn't using a DMS (and if you're a large organisation you really should be), the 'same place, same name' approach avoids the recklessness of emailing attachments because you can email the document's URL instead. Think about it: if a person receives a document as an attachment, they have no way of knowing if or when the source document changes; but if instead they receive an email with a URL to the source document, they will always get the latest version when they click on the URL.

Julian Maynard-Smith is a consultant, knowledge manager and novelist who blogs at betterbusinesswriting.weebly.com. Reproduced with permission.



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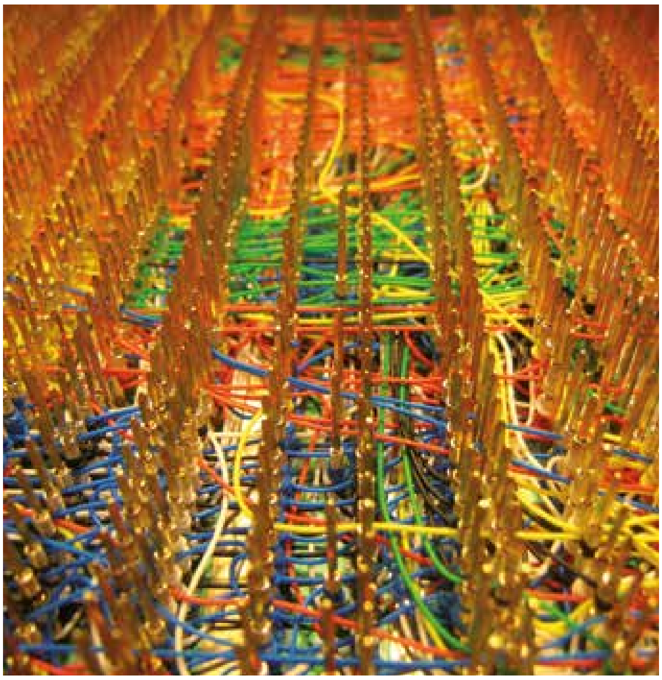
Unstructured Data Analytics Shouldn't Be Such a Mess

By Kon Leong



The problem with searching for a needle in a haystack is that the process, by nature, is inefficient. So why has it become a popular analogy for analytics efforts within the enterprise? Because today's analytics attempts – particularly for unstructured human data – are typically a mess.

Today's analytics are often ad hoc and rely on incomplete or skewed sample sets. They commonly focus on only one narrowly-defined data type. So for each glimmering "needle" of insight, it seems that heaps of data are scattered and cast aside, often at the cost of subsequent business efficiency.

When it comes to business content such as files, email, social media, IMs, calendar entries, images, and more, firms are failing to extract meaningful insight despite the potential wealth of information contained within.

There's a reason for this: Because the data is poorly managed to begin with. Businesses are treating analytics as a separate business function from data governance, when it's actually fundamentally dependent on it. Analysis occurs downstream; so by neglecting initial information governance infrastructure and practices, the enterprise is essentially sampling tiny random buckets of data from a whitewater river of information.

Many firms struggle to manage or even understand what sort of unstructured content they even have, let alone begin to effectively manage it. History is partially to blame, to be sure; most attempts at managing unstructured content were hastily prompted by waves of regulatory and legal reform that demanded immediate action. A reactive response was triggered, and many of those initial "band-aid" information management fixes remain in place today. Simply scratching beneath the surface often reveals a tangled mess of siloed data platforms such as enterprise content management systems (ECMs), legacy systems, duplicated copies, and even entire missing categories of data.

It's no wonder that businesses are having trouble getting analytics value from this data. For unstructured data, it makes sense; the technology required to process large volumes of diverse human-generated content is nascent compared to traditional BI and ERP systems that mine more mature and structured forms of data. Add to that the general state of mismanagement of most unstructured content, and you have an environment in which data never reaches its potential … or worse, results in erroneous business decisions.

We don't necessarily need to get rid of the extra data "hay" that these stacks are composed of; that would entail getting rid of potentially valuable content. We just need to completely re-think how the data itself is managed. No more data "haystacks" means no more disparate data sources, no more ad hoc sampling attempts, and no more dirty or duplicated data. Furthermore, it vastly reduces the compliance risk associated with data mismanagement; with consolidated control, policies for management and eventual disposal can be implemented centrally and securely.

The lesson here is that data governance is the necessary foundation of all successful data analysis. The statistics axiom of "garbage in, garbage out" is used ad nauseam for a reason: because it's accurate and timelessly relevant. So at risk of abandoning our original metaphor, we're trying to build a data lake, pooling all available resources into a single environment where they can be managed and analysed in real time. Forward-leaning businesses are already making strides to achieve this, and they're not doing it with flashy analytics tools – those can come later, once the foundation is built. In a cohesive governance environment, analytics can be brought TO the data, rather than data cumbersomely being sampled and brought TO the stand-alone tools.

If large organizations want better analytics, they need to start with better information governance practices. After all, they probably should have been better all along.

Kon Leong is CEO and Founder of ZL Technologies

Kodak Alaris launches AI Foundry

Kodak Alaris has announced the creation of AI Foundry, a business dedicated to helping organizations process and learn from structured and unstructured data through the use of proprietary Artificial Intelligence (AI) technology.

"Unstructured communications are a disruptive force to the enterprise, breaking automation, adding cost to business processes, and driving down customer satisfaction," said Steve Butler, general manager of AI Foundry. "AI Foundry was established to harness the power of artificial intelligence to understand amorphous data and provide smarter 'context aware' information management. With our end-to-end solutions for automating business processes, enterprises can work with AI Foundry to solve customer experience or content management problems holistically and drive the greatest ROI."

AI Foundry's flagship offering, Info Insight, is designed for businesses across a variety of industries and vertical markets, such as insurance, healthcare, retail, logistics, utilities, and anywhere customers interact electronically with their vendors.

"The name 'AI Foundry' aligns with our iron-clad solutions for understanding and managing unstructured communications," said Alan Swahn, vice president of marketing at AI Foundry. "The core advantage is that Info Insight uses natural language processing to read and understand unstructured information from all media that we use to communicate in our daily lives, including email, web chats, text messages, email attachments, and social media content. Traditional rule and keyword-based systems just aren't up to the task of solving today's problem. Our new breed of 'context aware' information management, positions AI Foundry to capitalize on the explosive growth of unstructured data." *http://aifoundry.com*

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NZ Supreme Court rules digital files are 'property'

By Ken Moon, Consultant and Laura Carter, Associate, AJ Park Law, Auckland

The bouncer who released footage from a Queenstown, New Zealand bar featuring English rugby player Mike Tindall, has had his conviction under the Crimes Act upheld by the Supreme Court. The court's decision is based on its finding that the digital file Mr Dixon removed from the bar constitutes property under the Crimes Act.

This represents a departure from the position that has been previously thought to apply in New Zealand, which was that information and software are not property.

Implications of this decision could be wide-ranging, as it may make some acts of taking information a crime, where they would not previously have been. It also may in some cases make acts a crime, which previously would only have been copyright infringement.

During the Rugby World Cup 2011, the English rugby team had a night out in Queenstown. In the course of that night, the vice captain of the English rugby team Mike Tindall (who also happens to be married to Queen Elizabeth II's granddaughter) had an encounter with a woman. The bar in question had CCTV. A bouncer at that bar, Jonathan Dixon, took a copy of the CCTV footage of Mr Tindall from the bar and tried to sell this footage. When he was unable to do so, he uploaded it to YouTube.

Mr Dixon was convicted of accessing a computer system for a dishonest purpose, under section 249 of the Crimes Act. Section 249 makes it a crime to:

'directly or indirectly, [access] any computer system and thereby, dishonestly or by deception, and without claim of right, [obtain] any property, privilege, service, pecuniary advantage, benefit, or valuable consideration'.

In Mr Dixon's case, he was originally convicted on the basis that he obtained 'property'.

Mr Dixon appealed to the Court of Appeal, and his conviction was substituted for one that he had obtained a 'benefit' under section 249. The Court of Appeal reached this position based on its view that the digital file Mr Dixon took could not be considered 'property'.

However, the Supreme Court reviewed the relevant law from New Zealand, the US and the UK and found that the digital file was 'property', so the original conviction was reinstated.

Reasoning of the Supreme Court

The primary issue for the Supreme Court was whether digital footage stored on a computer system was 'property', as defined in the Crimes Act*.

The Court of Appeal in this case had decided that it was not**. It pointed to the English criminal case of Oxford v Moss which had held that information, even confidential information, was not 'property' and the Court of Appeal noted this was consistent with the general approach taken in civil cases. The Court of Appeal, in analysing whether digital footage might be distinguished from confidential information, concluded it could not-'bytes cannot meaningfully be distinguished from pure information'.

The Supreme Court disagreed, taking the view that digital files were more than pure information and thus felt able to put aside the criminal and civil authorities which had held information was not 'property'. Proceeding unencumbered by these authorities, the Court noted that the other computer misuse offences referred to software and data and therefore a purposive construction of section 249(1)(a) suggested the reference to 'property' must include digital files.

The Supreme Court also considered it was a fundamental characteristic of property that it was something capable of being owned and transferred. The digital files taken by Mr Dixon were capable of being sold and this was another indicator they constituted 'property'. It noted the Crimes Act definition of 'document' included an electronic file and surely a Microsoft Word document must be property and thus so must other forms of digital files.

The Supreme Court preferred to equate digital files with software rather than information, and thus felt the way was clear to adopt those US authorities which had held software to constitute property. It decided that there was no reason not to accord digital files the same status in New Zealand for the purposes of the section 249 of the Crimes Act.

So what does it all mean?

The short answer is that this case does change the law in New Zealand. Digital files, and we would suggest software (by logical corollary), is now 'property' that can be 'obtained' in breach of the Crimes Act. This will make some acts a crime, that would not have previously been considered to be one.

While the case is about section 249, which covers the narrow crime of accessing a computer for a dishonest purpose, it can be expected that the definition of 'property' used by the Supreme Court will be applied in other situations. The NZ Herald has already made a possible link to whether it creates a case against the receiver of hacked information. Where in the past unless information was confidential, the taking of it (for example from an employer) could not be prohibited, this case now opens the door for the taking of non-confidential information that is in the form of a digital file, to be a crime.

It also raises the question of whether acts that constitute copyright infringement, could now also be a crime.

We will continue to watch and report on this space.

[*] The section 2 definition states 'property' includes 'real and personal property … and any other right or interest'.

[**] [2014] NZCA 329.

Digital transformation is only just beginning: Survey

A new study by The Economist Intelligence Unit has found that while a majority of companies have yet to implement their digital transformation initiatives, most expect their operations to be 80 percent digital or more in the next five years. The study, sponsored by Accenture and Pegasystems, is based on a global survey of 444 executives from the healthcare, finance and telecommunications industries. The findings suggest that digital transformation aspirations are high, yet making progress can be complex. Only 18 percent of organisations today have fully integrated customer facing processes with their back office systems and only 10 percent report their businesses are fully digital. Establishing the right operational governance model and evolving company culture are tied as the top challenges to digital transformation, while evolving customer expectations rank as the top driver.

Analysis by The EIU reveals two statistically significant groups within the survey sample: those who are ahead of the curve and those who are behind it. Those who are ahead of the curve are more likely to be driven by achieving market leadership and disrupting their core business as motivation for digital transformation. By contrast, behind-the-curve companies are more inward-facing in their focus and are more likely to cite cost pressure and regulatory compliance as drivers leading them to undertake digital initiatives.

The report also reveals the organisational practices that have helped some companies get ahead of the digital transformation curve. For example, they are more likely than behind-the-curve companies to have set up a separate unit with responsibility for digital business and have a chief digital officer leading their transformation initiatives.

However, these are transitional measures, the report concludes. “The ultimate aim of any digital transformation initiative should be the ability for the whole organisation to transform constantly in response to digital innovation,” says Pete Swabey, senior editor at The Economist Intelligence Unit.

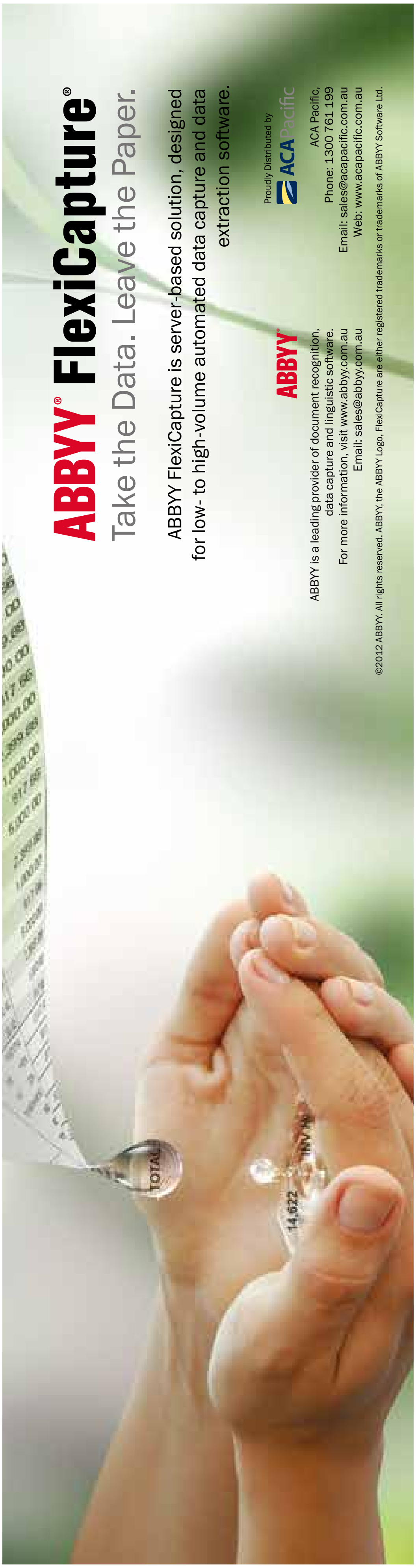
The growing sophistication of digital consumer technologies, such as smartphones and social media platforms, means that customers have high expectations for their digital interaction with businesses. Half of all survey respondents identify evolving customer expectations as a key driver of their digital transformation initiatives.

When asked which capabilities they hope to improve through digital transformation, 57% of respondents identify the ability to support real-time transactions, more than any other capability. This was especially common among companies that are ahead of the curve. The ability to provide employees with real-time data on any device, and executives with real-time analytics, was also a common objective. This highlights the importance of information management capabilities in digital transformation—described by one executive interviewed for this report as “a foundational underlier” for any such initiative.

Over half of the survey respondents (52%) report that in their organisation, the chief information officer or chief technology officer holds a primary leadership role in digital transformation. However, this is rarely a one-person job, and at the majority of companies at least two members of senior management have a primary leadership role in digital transformation, reflecting its multi-disciplinary nature. Having a chief digital officer (CDO)—an executive with a specific remit for digital—who takes the lead in digital transformation is more prevalent among companies that are ahead of the curve. However, the role of the CDO is viewed as transitional: digital transformation may benefit from a dedicated leader at the beginning, but the need may fade as digital capabilities are established across the entire organisation.

The C-suite role most commonly identified as having primary leadership of digital transformation is the chief information officer or the chief technology officer, as selected by 52% of respondents. This is followed by the CEO, with 37%, and the chief operating officer (28%).

Read the full report at www.digitalevolution.eiu.com



Around the world with ABBYY

ABBYY has announced its role in helping Rhenus Assets & Services – the Shared Services Centre of the global logistics company – to process up to 1.8 million documents annually in the form of incoming invoices, delivery notes, and many other paper documents. Following central processing and classification of the documents, data from incoming invoices are read according to business rules and then passed to the workflow-based approval process in SAP.

Rhenus uses ABBYY to centrally process a large number of time-sensitive documents – such as incoming invoices, customs clearing documents, delivery notes, loading records, and order-picking notes. They perform this work for 80 locations of the Rhenus Group spread around the world.

These documents are scanned at the respective locations and then transmitted to the Shared Services Centre using ABBYY FlexiCapture. Using ABBYY's input management platform and the associated add-on for invoice processing, all relevant data is then automatically captured and subsequently verified via ABBYY web clients. Integrated middleware handles archiving and sends status reports to the various logistics systems and/or partners. Incoming invoices are indexed and passed on to the respective SAP workflows for processing.

ABBYY replaces the solution that Rhenus had previously used to capture and process documents. Rhenus selected ABBYY because of the high quality of data capture, its flexibility and transparency in the architecture, its scalability, and fast implementation possibilities. This means that established processes, including existing automation, were able to be retained in their entirety.

Other business areas of the logistics provider have also now launched document-processing projects based on ABBYY software for invoices and customs documents and a further roll-out within the Rhenus Group is planned.

"ABBYY won us over us from the very start with an outstanding capture rate and a very good price-performance ratio. Just four days after installing the software, it was ready for testing and could be adapted precisely to meet the required processes, documents, and specific data items. In addition, the expert support made fast implementation possible. Overall, we are extremely satisfied," says Thomas Schreiber, head of shared services, Corporate IT at Rhenus Assets & Services.

ABBYY FlexiCapture is an enterprise capture platform for comprehensively capturing data from a variety of document types and then passing them on to internal business processes. The solution can be customised to meet specific needs and integrated into existing systems. Specialised modules enable automation of incoming invoices with ABBYY FlexiCapture for Invoices or automated processing of incoming mail with ABBYY FlexiCapture for Mailrooms.

For further information contact sales@abbyy.com.au or phone 02 9004 7401.

Alfresco preserves indigenous history

South Australian technology company Parashift has been chosen to help streamline the digitisation and cataloguing of artefacts for the world's largest collection of material relating to Aboriginal and Torres Strait Islander cultures and knowledge, held by The Australian Institute of Aboriginal and Torres Strait Islander Studies (AIATSIS).

AIATSIS holds a collection of approximately one million objects together with the accompanying documentation. Digitisation of this collection began in 2001 and in many

areas has become a race against time as fragile formats deteriorate. As the project progressed and technology and standards evolved, it was recognised that more sophisticated tools would be required to manage the process.

AIATSIS Executive Director of Collections Lyndall Osborne said after approval was given last year to seek a suitable solution, manufacturers from across the world were invited to submit solutions that might satisfy the Institute's unique requirements.

"Our project team met with every business unit to form a detailed set of requirements. A number of the proposals were explored in depth and ultimately it was determined the Alfresco DAMs/EDRMs solution proposed by Parashift would provide the best possible outcomes for AIATSIS," Ms Osborne said.

Parashift Managing Director Kieren Fitzpatrick said the specially tailored solution will provide many benefits for AIATSIS.

"We've added modules to customise the product including an open source analytics system to better manage, prioritise and provide real-time reporting on the digitising progress, a business process management system, as well as a very powerful searching and indexing tool," said Mr Fitzpatrick.

"The new DAMs/EDRMs will provide a single index for all of AIATSIS' information – documents, digital assets and records. This will facilitate greater collaboration across the Institute and enable more sophisticated workflows. Instead of people emailing back and forth, or updating spreadsheets, many of these processes will be automated. People will be freed to focus on digitising the collection."

"An open source analytics system we chose will give the Institute even greater insight into the progress of digitisation so it can prioritise resources better based on real-time reporting on the digitising progress.

"AIATSIS will also benefit from two other modules, a business process management system and a very powerful searching and indexing tool," said Mr Fitzpatrick.

Beating the backup blues at PFD Food Servicees

A move to the Amazon cloud for data backups is paying dividends for PFD Food Services, Australia's largest privately owned fresh and frozen food distributor with $A1.5 billion turnover, 2,200 staff and over 65 sites across Australia.

By adopting a solution utilising Commvault Enterprise Backup software, the company claims to have stripped out 34 percent in costs from tape management, media handling, storage and resources due to manual intervention.

PFD's main data centre is hosted by Telstra in Melbourne, with snapshots taken every hour and transferred to a second Telstra data centre in Sydney used for disaster recovery. More than 6.5TB of weekly full backups that were archived from the DR environment to LTO4 tape are now instead migrated to the Amazon S3 cloud via Commvault.

"Food distribution is a fast and often unforgiving business; there is a narrow window to match supply and demand for customers, while the market is fiercely competitive," said Richard Cohen, Chief Information Officer of PFD.

"We have to do everything we can to give ourselves that competitive advantage, which means the free flow of strategic business information. Systems downtime is simply not an option."

"The backup to tape process was taking from midnight to 6 or 7am and we are now a 24x7 organisation so it was unacceptable that we needed to kill tape backups to get system performance back. We needed a more robust and timely system that would cater for our data volumes."

The move to the cloud is allowing infinite backups instead of the previous 90 or 180 day limit.

Cohen says the business has confidence that if there is a failure in the primary data centre, the data stored in the cloud can be up and running within an hour. Following the success of this migration, the firm's solution provider Venn IT will help Cohen achieve further cost savings by archiving older files to Amazon's Glacier cloud storage platform.

Cohen said, "Our goal is to provide the business with a reliable, resilient and risk-free environment – taking a programmatic approach to data management. We have achieved this by harnessing state of the art technology to strip out costs, modernise our information strategy and guarantee durability and protection of our strategic data assets."

There are more than 1100 users on the PFD network accessing enterprise applications. FD's core business system is MFG/Pro, which it has heavily-modified to suit the food service environment. PFD also uses Kronos workforce management solutions deployed in the Kronos Cloud.

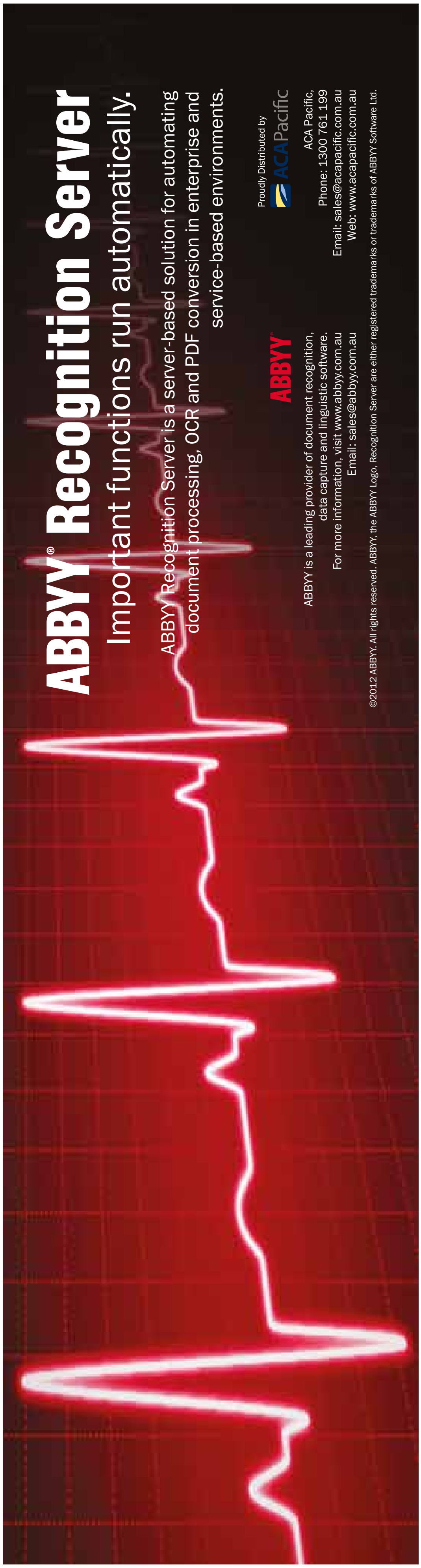
"Our data priorities are driven by our main business system, which can now be brought back up within an hour if it falls over. Our next priority was then email and recovering our Exchange environment, which is a mix of 2007 and 2010. Even four or five years ago email wasn't seen as such a priority in our business as it is today."

"The data priorities are driven by the application and the impact on the business should that not be available."

"If something was to happen to our DR environment now we could just run up the Amazon environment as our production environment."

PFD is seeking to modernise its data management strategy and information infrastructure. A project to deploy a new intranet will include a document management system that will leverage SharePoint to manage files currently on network fileshares.

"We struggle a bit with collaboration at the moment because half of our sites across the country are on low bandwidth links using Telnet to access our main business system. A full network refresh will cater for a more Windows GUI oriented applications and document sharing utilising SharePoint," said Cohen.



Information Management Maturity Levels or Why People Don't Use Software

By Rodney Brim

Have you ever struggled with why a team, a direct report, or a business group didn't use a software tool that "was purchased for them"? If you ever have been responsible for deploying software, you've probably encountered this.

Not using software that get's purchased is actually a common phenomenon, even if you attempt to avoid that outcome by doing best practices, such as building engaging discussions of "Why?" and "What's in it for me?". I've struggled with this process repeatedly over the years, in all kinds of organizations, from working with the United Nations to 3 person service firms to high tech giants. The question often sounds like, "What gives... why does getting people to use new software have to be so hard?"

I was doing some research on Information Management and what's described as maturity levels for how well organizations manage information. The Justice Ministry in New Zealand has a reasonable good description and IMM graphic on their site if you care to visit for reference.

Let me use the initials IMML to stand for Information Management Maturity Level. It sounds rather "dry" when you read it, but in 25 words or less, IMML reflects the awareness that there are different levels of effectiveness at managing information from documents to to-dos, from operations, to growth and transformation. The increasing levels of "maturity" represent increasing levels of attention and processes regularly applied to managing information and ultimately deriving value from information.

But here's the thing. Whether you recognize it or not, whether you introduce new software or not, IMML will directly affect how well things get done at work, if they get done, and your bottom line. Let me explain.

Think of IMM as reflecting various levels of rigour about collecting and sharing information at work. It's based upon, among other things, the awareness that information management helps people perform: better, more accurately, more timely, more consis tent with what works, with less labour per output, less do-overs, less misdirection, and less time priority mismatch based misallocation (spent 4 hours, when should have only spent 1, given the priority). That's quite a list isn't it?

Look at the chart below if applied to where you work. Think how things really happen at work, how information really gets managed in the department you work in. You, your office, your work group probably fall within one of the five levels of information management. It gets even more interesting (to me and hopefully you). If you start thinking of information management behaviours, you begin to notice they have an uncanny resemblance to age dated behaviors when it comes to picking up stuff as you move from childhood to adult.

Recalling the past and raising kids, it occurred to me how much some of the exact same language and behavior appears when deploying software. Whether its information or clothes, we go from:

- I'll only do it if you do it with me, to
- I'll only do it if I have to, to
- I'll do it if someone is going to view it, to
- I'll do it because its part of the job and my role, to
- I'll do it because it helps me/us get ahead/be better.

This all lead to that epiphany of sorts. It suddenly made sense why we don't use software we purchase or someone else purchases for us. And frankly there's a number of possible reasons why, including the fact that sometimes software doesn't turn out to fit our needs, or we felt like we were making progress by buying the software, and that turned out to be good enough, etc.

But the epiphany boils down to this: We tend to operate within our maturity level and resist or at least not adopt habits that aren't consistent with our level and comfort zone. E.g. If you acquire software that doesn't match up to (exceeds) the user's information management maturity level, there's a mismatch, and typically they don't make a habit of using the app, and in fact may refuse or ignore it right from the initial deployment.

Here's another way to think of it. Buying information management tools doesn't automatically up-level people's IMML. Simply buying better information management tools (e.g. project management, document management, etc.), doesn't change the level of maturity with which people are operating.

That's the big insight. Hopefully it was good for you. For me it created that sort of sign you have inside when you go, "Oh... that's why that is happening!"

Before I wrap up, let me respond to a question you may be asking right about now, and that is, "So how do you up-level the maturity of information management where you work?" Actually there are only two primary choices:

1. You actively lead the up-level process. You do it by prioritizing information management, sustained investment in the process and outcomes, modeling it yourself, and insisting others operate at a similar level. All the while engaging, monitoring, reinforcing, celebrating, and validating information management's importance. And yes, eventually removing people who insist on not up-leveling.

2. You hire a "room cleaning service". In project management circles I've heard them referred to as the "project management police." Essentially you set aside resources to collect and update information, such that those who need to function at level 4 and 5, have the information they need - even if most of the rest of the organization is functioning at a lower level. If you don't have the time and personality to drive this process, sometimes using the proverbial "room cleaning service" or "information management police" is the best and most expeditious option short term.

The fact that people don't use software purchased for them, even if it would help them be more effective, is a well documented, and expensive fact. A primary reason we don't use "well intentioned" software, is that it doesn't match our information management maturity level. This has surprising parallels with patterns and attitudes expressed about picking up clothes as we move through the first five decades of life. In fact, buying new software does not cause people to "up-level".

Level 5	Information management is not only up-to-date, there's a definite culture around using information, analyzing and maintaining it so as to improve performance. It's viewed as a necessity to competitiveness and business growth.
Level 4	There's pretty consistent information management. 80% of the time you can find what you're looking for without significant delays. Dashboards are used and current.
Level 3	There are information management tools and processes in place, but they aren't used consistently. Information isn't necessarily shared across business groups, and it's often contained in reports and power points, making it hard to track and interpret data over time.
Level 2	Information is managed episodically and based upon personal preference and need, and there's resistance to adhering to standards for information management.
Level 1	Information is managed chaotically, as needed to solve an immediate problem.

Rodney Brim is CEO of Performance Solutions Technology http://www.managepro.com/blog/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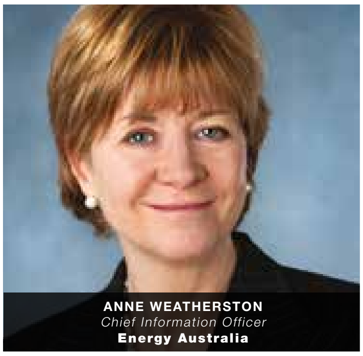
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Putting order in the Court!

Since becoming the first court in Australia to implement an electronic court file (ECF), the Federal Court has been acknowledged as a global leader in the practice of managing electronic court documents and received a number of awards in recognition of this achievement. Having accomplished the digitising of its Court case files the Court has now turned its attention to the challenge of digitising the Court's administrative records held in its Principal and eight district registries.

The Court is tackling this task with the rollout of Knowledgeone's RecFind 6, an Electronic Document and Records Management System (EDRMS) and the RecFind digital application product the' Button'. These products are assisting in the capture and classification of a range of corporate records including emails and administrative documents.

Lyn Nasir, the Courts Records Manager, said the Court is committed to the recently released Digital Continuity 2020 policy, which builds on the Digital Transition Policy and aims to transition Australian Commonwealth agencies to digital information management.

The new policy encourages agencies to continue progress made under the Digital Transition Policy and move towards efficient digital information governance and management.

To achieve this end, the Court extended its use of their existing RecFind 6 system to transition from paper based files to a fully digital environment.

Documents for retention are now saved in RecFind; the Court's endorsed EDRMS, in digital format only. From January 1, 2016 paper files will no longer be the Court's accepted format.

The Court's relationship with RecFind goes back to 1993, when it managed the physical court case files in the Court's Queensland registry. From there its use was extended to track all court case files around the country.

While the Court case files are now electronic, RecFind 6 still manages all the physical court case files created prior to the digitisation process.

Meanwhile the digitising of the administrative files has been moving quickly and has now been rolled out to all the registries of the Court.

Each registry has its own file folder profile in RecFind 6 for adding administrative records, while access to the information is controlled by registry security groups that are created within the RecFind 6 security model. Additional levels of security can also be created within each registry to manage access to confidential information.

To assist users in making it easier to capture digital records the Court committed to an enterprise wide rollout of the RecFind 6 'Button', which is now the primary tool used to add emails and electronic documents into the RecFind repository.

Having the RecFind 6 Button embedded in the Office applications makes it easy for staff to save documents, and particularly emails, directly to a virtual file within RecFind 6. Since implementing the RecFind 6 solution, the Court has found some obvious benefits – particularly around management of emails.

"This has made the management of emails so much easier, as previously emails were only kept for 30 days before being archived in a vault system, which made retrieval very time consuming" said Lyn Nasir. "Now we can access all emails directly from within RecFind 6".

Lyn also sees the benefits of having one repository for all the Courts administrative records and files, rather than having information duplicated in several places. She feels that once staff are confident in the knowledge that documents stored in RecFind 6 can be easily found and retrieved, they will no longer keep copies on shared drives and within Outlook folders.

The Court is also considering the RecFind SharePoint integration platform for capturing finalised documents in SharePoint.

Many case files began in the paper era and are yet to be resolved, for example Native Title case files, so the ongoing management of paper records held on site or with external providers is important.

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Strategic Buying: Enterprise Software

By Jeffrey Friend

Enterprise applications represent some of the largest, most expensive and most crucial software packages a company purchases. These products form the backbone of a modern business: managing its supply chain, customer relations, and data and content. The right enterprise application helps a company run with unparalleled efficiency, while a poor-fitting application can cause issues at all levels of the business. But because this software comes with a high price tag, buyers should be aware of all the factors they can leverage during negotiations to help them seal the best deal. IBISWorld has identified key enterprise software applications and analyzed price trends to help businesses be more strategic in purchasing.

Supply Chain Management Software

Supply chain management software helps businesses with tasks related to supplier relationship management and transactions. The software tracks inventory levels of inputs and finished products and manages input sourcing, helping businesses build and maintain quality relationships with suppliers.

Procurement software and inventory management software overlap in functionality somewhat, but only supply chain management software will allow users to oversee the entire process, from input acquisition to product construction.

A few large vendors dominate the market for supply chain management software, but in general, buyers hold much of the negotiating power. The average price for the software has been mostly flat during the past three years, falling only 0.1% per year on average and resting at $25.53 per user per month.

During the next three years, however, prices are expected to fall at a faster annualized pace of 1.2% as more companies look to free open-source versions of the software.

Although the limited scope and features of open-source software offerings are not robust enough for most enterprises, their strengthening presence in the supply chain software market is effectively forcing vendors of paid offerings to reduce their prices to remain competitive.

CRM Software

Customer relationship management (CRM) software manages front-end business operations, namely sales, marketing and customer and technical support.

The product tracks and records the entire sales process, from initial contact through final sale, and then maintains the account history for future client support.

The software-as-a-service (SaaS) delivery model has been almost entirely adopted by CRM software vendors, making this software easily accessible to a wide range of buyers at any time.

The SaaS model, which uses cloud infrastructure to give buyers access to the software over the internet rather than installing it on the buyers' systems, costs less to operate and has increased competitive pressure among vendors.

During the past three years, the average price of CRM software has been rising a mild 0.7% per year on average, reaching $160.90 per user per month in 2015.

Enterprise Software Price Trends

	Average Price (2015)	Annualized Price Growth 2012-2015 (%)	Annualized Price Growth 2015-2018 (%)
Supply Chain Management Software	$25.53 per user per month	-0.1	-1.2
Customer Relationship Management (CRM) Software	$160.90 per user per month	0.7	1.3
Human Resources (HR) Software	$54.50 per employee per month	4.7	3.6
Enterprise Content Management (ECM) Systems	$396.88 per user	1.2	2.4
Enterprise Resource Planning (ERP) Software	$1,911 per user	-1.8	-1.9

SOURCE: WWW.IBISWORLD.COM

As market demand and merger and acquisition (M&A) activity pick up, prices are forecast to increase a stronger 1.3% per year on average through 2018. Despite M&As, new companies continue to enter the market, boosting competition and aiding buyer negotiation power.

HR Software

Human resources (HR) software aids in the tracking of workforce performance and the automation of administrative tasks related to talent management, such as payroll and benefits administration. The software can also help source new workers, track their performance development and help companies get the most value out of their employees.

In this market, buyers are unfortunately at a disadvantage in negotiations largely because a small number of vendors command a majority of the market. This high concentration leaves buyers with fewer vendor options, which reduces price competition.

In addition, demand is in a state of rapid growth as more and more companies have realized the benefits of HR software. As a result, since 2012 the average price of HR software has risen steadily at an annualized rate of 4.7% to about $54.50 per employee per month in 2015. Prices are expected to continue rising at an annualized rate of 3.6% through 2018. While the dominance of a few vendors supports this price growth, these companies' low bankruptcy risk ensures they will be able to supply buyers without any risk of interruptions.

ECM Systems

Businesses use enterprise content management (ECM) systems to manage and store all unstructured content, which is made up of files and data (e.g. documents, media, e-mails) that are not otherwise organized according to an existing data model. Large enterprises generate massive amounts of unstructured content through day-to-day operations, and so the lack of an effective organization and management system can lead to great inefficiencies.

Demand for ECM systems has underpinned price growth during recent years. The average price has increased 1.2% per year on average to $396,876 per 1,000 users from 2012 to 2015.

As user content management needs swell each year, as evidenced by expanding business investment in computers and software, ECM system vendors must invest more in their own computing hardware. IBISWorld expects faster price growth of 2.4% per year on average during the next three years as demand heightens and vendors pass on their increased costs.

Similar to the supply chain management software market, however, the growing presence of open-source versions of ECM software has stabilized price growth, leaving buyers with significant negotiation power for at least the immediate term.

ERP Software

Enterprise resource planning (ERP) software manages a wide array of back- and front-office operations, with considerable overlap with the aforementioned applications. The goal of ERP software is to manage a product from initial idea through to product delivery, including manufacturing, marketing, sales and distribution.

The software also manages a company's resources, such as human capital, machine capital and cash, across multiple product lines to ensure these resources are being utilized to the greatest capacity. The ideal ERP package works in harmony with the other software packages in this report, overseeing the entire operation while allowing greater granular control of their areas of specialty.

The average price of ERP software has fallen at an annualized rate of 1.8% in the three years to 2015, currently averaging $1,911 per single-user license. The proliferation of SaaS as a delivery model has been the primary driver behind the price falls because it costs less to operate and has increased competitive pressure among vendors.

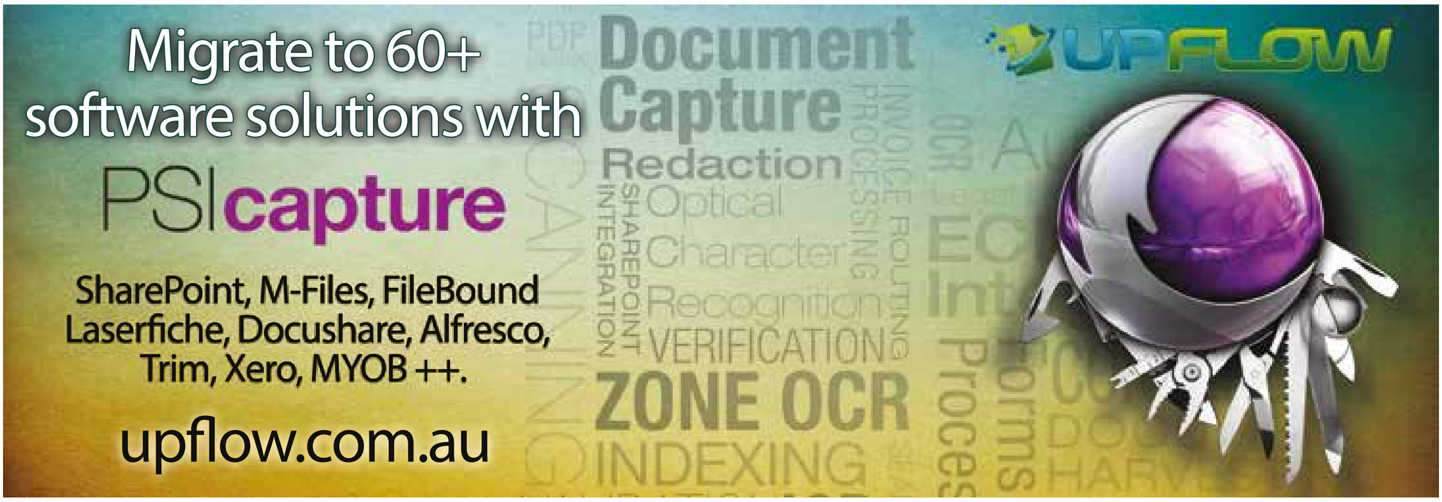
Conversely, the high level of market share concentration and often exorbitant costs associated with switching vendors work against buyers. Leading vendors' low financial and supply chain risk, however, alleviates some of the risks that buyers might be exposed to. During the next three years, prices are forecast to continue falling at a similar annualized rate of 1.9%.

The Software Strategy

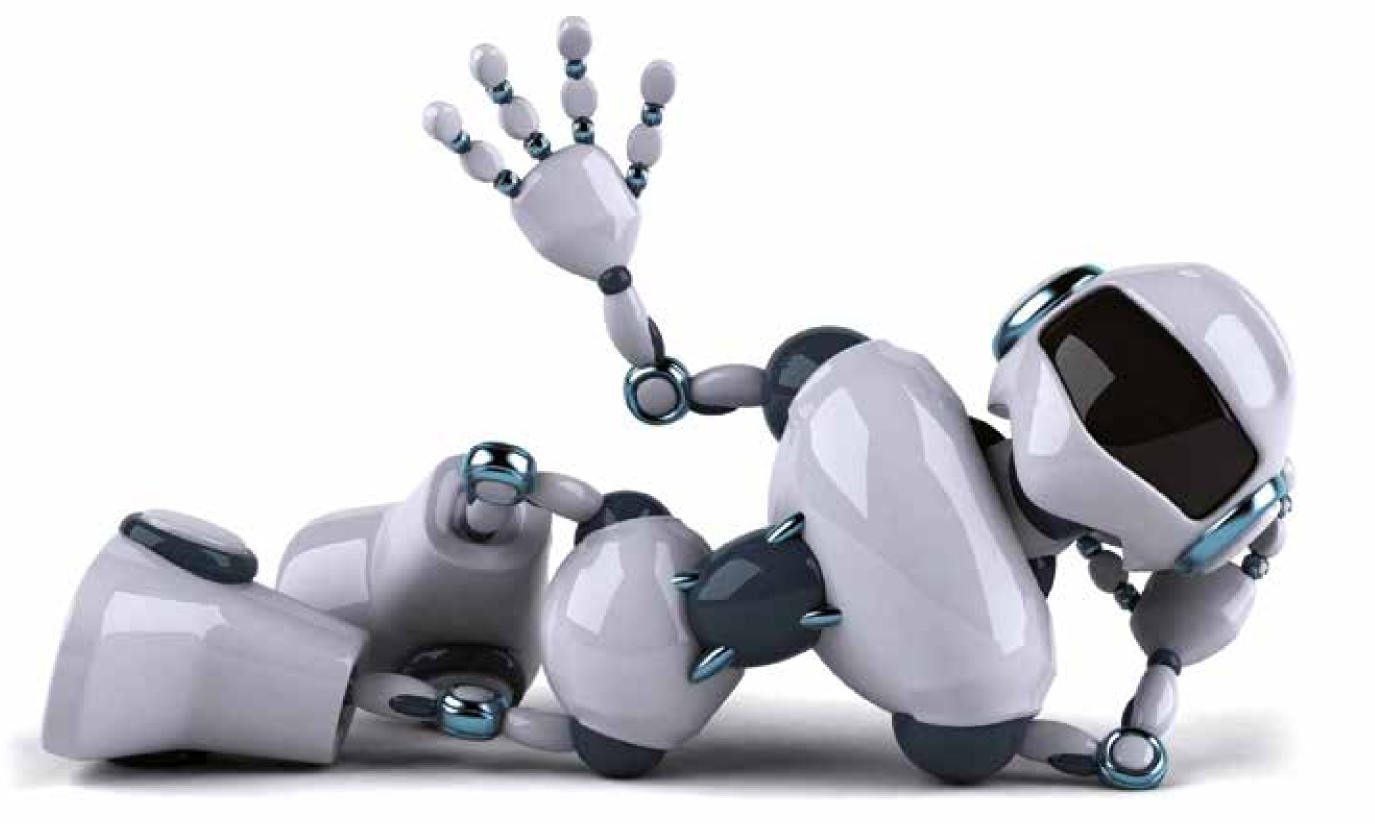
Enterprise applications form the spine of most modern businesses: They track, manage and optimize a business' back-office operations to save time, cut costs and find efficiencies. However, the high levels of productivity and cost savings these applications achieve come with high purchase prices and complex implementation procedures.

Because of their obvious benefits in an increasingly digital economy, enterprise software is in high demand, thus positioning vendors to raise prices without risking lost business. Although the proliferation of open-source software is restraining price growth in most software markets, strengthening demand overall is boosting growth rates in many others. As such, buyers should enter purchasing processes armed with as much market information as they can to help secure the best deal.

Jeffrey Friend is Business Development Manager - Procurement Division at analyst firm IBISWorld



5 Ways Robotics Process Automation (RPA) Can Be a Game Changer



By Paul Singer, Siddhartha Sharad and Joe Ripple.

RPA is the next big thing, but it is more than hiring robots to automate tasks. It can transform how business services are managed. As robots move from the shop floor to the back office, robotics process automation (RPA) is creating a paradigm shift in shared services.

The value proposition is compelling: software robots replicate simple, repeatable human tasks at a keystroke level to improve accuracy, and they are quicker and more cost effective to deploy than traditional IT solutions. RPA solutions offer non-intrusive, relatively easy integration with legacy IT applications, and this opens up automation possibilities for process efficiencies that previously were considered cost prohibitive due to the IT effort required.

That said, robotics process automation is not the remedy to all process problems. Any organisation planning RPA deployments should consider five things before diving into this emerging area.

1. Robotics Process Automation Is Not a Replacement for Traditional IT Projects

Robotics process automation has emerged as a choice for process owners to automate what is difficult to optimise. It is a viable, near-term alternative to traditional IT optimisation projects (such as core platform changes or complex business process management initiatives) that can be time-consuming and complex. While RPA offers the promise of quicker returns without large IT investments, there is a limit to the scenarios where RPA can be applied effectively.

RPA can be a good solution for automating a manual activity that is rules driven, data intensive, repetitive in nature and crosses multiple systems and decision points. Consider a situation where a customer service team requires verification of a new customer's information from a third-party website. In the traditional IT world, automating this third-party interface with the CRM application is often cost prohibitive. So, customer service reps manually perform this verification, which ties them up in repetitive, mundane tasks.

RPA would work great here. An automated sequence can verify customer details with the third-party site without manual intervention, giving the rep time to handle more complex customer queries.

On the other hand, in transaction-intensive businesses, such as healthcare claims processing or financial trades processing, RPA may not work due to the scale and scope of optimisation required. Core system transformation projects may continue to be the right answer to drive large-scale automation and straight-through processing capabilities.

RPA, therefore, is not likely to be an "either/or" alternative to complex IT projects based on BPM or ERP. While IT projects are designed to optimise end-to-end processes, RPA is geared toward automating discrete processes to improve predictability. It is a tool to achieve quick benefits in the short term and ensure improved process consistency and auditable controls, but can later be supplanted by IT-based optimisation, provided the benefits can be obtained.

2. Business and IT Must Collaborate for Robotics Process Automation to Succeed

The idea that RPA can be implemented with minimal changes to existing applications can be enticing for process owners. RPA solutions integrate with existing systems with relatively minor IT development effort, typically at the user interface (UI) layer or via pre-existing APIs.

This fact may lead the process owners to underestimate IT involvement, which could be a costly mistake. RPA solutions work best in a stable IT environment, as changes to the IT applications can render the RPA solution ineffective or redundant. Also, a proper assessment of risk controls and data security may become essential while implementing automation. Such nuances, sometimes not obvious to the business owners at the onset, can be resolved by proactive IT involvement and ownership.

For the best long-term results (e.g., solution stability and fast response times) process owners and IT must closely collaborate to drive RPA. For example, it may be advisable to carefully assess the viability of RPA projects in a process area if an IT application upgrade is around the corner. By developing a two- to three-year roadmap for RPA implementations in collaboration with IT, organizations can avoid conflicts between RPA and IT initiatives, thereby increasing the longevity of RPA deployments.

3. Robotics Process Automation Has Benefits Beyond Direct Cost Savings

Robotics process automation is more than a cost-saving solution that replaces expensive labour with software-based automation. It also achieves quick hits, mitigates risk, improves quality, and redeploys the workforce to focus on processes that require judgment. For example, human errors such as "fat finger" mistakes in high-value transactions like a wire transfer approval can cause significant operational losses —sometimes billions of dollars — for a bank. RPA can automate the manual effort and eliminate the chance of human typing errors. In this scenario, risk avoidance and improved audit controls are the key benefits of RPA implementation, even though cost savings may be limited due to the marginal reduction in labour.

RPA can also create indirect benefits for a business. For example, by automating low-value tasks with RPA, organisations can redeploy staff to activities that generate higher value for the business. This can drastically improve work satisfaction for employees, resulting in cost savings driven by lower employee attrition. Similarly, RPA makes it possible for process owners to change processes faster, reducing time to market and transaction cycle time. For example, invoice process automation can reduce sales cycle time, which then improves working capital performance.

As process owners scout for automation projects where RPA can create business value, they should cast a wide net for opportunities that provide more than cost savings. A clear definition of objectives at the outset, and quantifying benefits that go beyond cost, while challenging, is critical.

4. Robotics Process Automation Will Impact Outsourcing Strategies

While the immediate focus of robotics process automation is to automate high volume, repeatable tasks, RPA will eventually redefine process optimisation and outsourcing strategies, just like squeezing a balloon from the bottom inflates the top. Developing a strategic plan for RPA is essential.

Organisations should develop a long-term roadmap that harnesses the true potential of robotics and "intelligent processes" that leverage data to develop business insights and continuously evolve through self-learning.

Process data collected by RPA, for example, can be used to develop valuable business insights when integrated with analytics solutions. RPA will soon be able to use analytics and machine learning to make business decisions that normally require human intervention. Cutting-edge software companies now offer machine learning and natural language processing solutions that can build "intelligence" within RPA. This intelligence can take RPA capability beyond automation of low-end tasks and replicate complex human behaviour to execute data-based process decisions.

5. Robotics Process Automation Is a Game Changer for BPO

Future BPO models will automate manual effort related to rule-based tasks using robotics process automation, and leverage skilled knowledge workers for tasks that require analytical thinking and experience-based decision making. Success for BPO providers will therefore depend on fundamentally changing their delivery model from labour arbitrage to value-based delivery.

RPA will impact buyers as increased automation will reduce the scope of outsourcing programs. This will allow organisations with multiple service providers to consolidate providers and move away from those that rely solely on labour arbitrage. Additionally, contract terms, pricing and SLAs will need to be modified to focus on outcomes vs. transactions. Outsourcing buyers should plan ahead for this disruptive evolution.

Overall, RPA is about more than hiring software robots to automate manual tasks. It is a new change lever that, when leveraged strategically, can be used by process owners to fundamentally transform how they manage business services in conjunction with technology and outsourcing.

Paul Singer is director, Siddhartha Sharad is senior associate, and Joe Ripple is associate at Pace Harmon, a management consulting firm based in Washington. http://www.paceharmon.com/

Law firm pioneers 'contract robots'

International law firm Berwin Leighton Paisner (BLP), has created what it believes to be the UK's first contract robot, to work within its Real Estate practice, putting it at the cutting edge of innovation in the legal sector. The company says it will allow lawyers to focus on higher value work for clients.

The solution is based on an Artificial Intelligence platform, known as the RAVN Applied Cognitive Engine (RAVN ACE).

RAVN ACE reads, interprets and extracts specific information from documents. It converts unstructured data into structured output, in a fraction of the time it takes a human - and with a higher degree of accuracy.

BLP's contract robot uses ACE core functionality to extract data from standard legal documents, cross-check the data internally, check it against external sources, and write the output into a spreadsheet, ready for the next stage of the process.

Matthew Whalley, Head of Legal Risk Consultancy at BLP commented, "The robot has fast become a key member of the team. It delivers perfect results every time we use it.

"Team morale and productivity has benefited hugely, and I expect us to create a cadre of contract robots throughout the firm. If the reaction to our first application is any indication, we will be leading the implementation of AI in the Law for some time to come. As far as leveraging the technology, it is early days for what we are doing."

Bruce Braude, head of strategic client technology at BLP, said "We plan to extend the application of ACE and similar technologies across our range of legal services, to further serve clients more efficiently and to be able to provide clients with greater insights into their contractual relationships. Initial applications will be on routine process-oriented tasks but, as the technology advances, we intend to apply it to more complex legal work."

Peter Wallqvist, Managing Director at RAVN Systems, added, "The use cases for RAVN ACE are virtually unlimited. In addition to law firms implementing a variety of automated review processes,

"RAVN is working with organisations from the Media, Telecoms, Professional Services and Financial Services sectors to revolutionise their handling of unstructured data. Use cases include automated Due Diligence, Document Review, Contract Assurance, Governance and Financial Instrument processing".

10 Things to Consider When Automating AP

By Vance Talbot

The internal discussion happens every year, doesn't it? "We don't have the budget ... We don't have the resources at this time ... We have another project that is taking priority ... Let's consider AP Imaging and Workflow Automation next year ..." Automating your AP department may feel like a daunting undertaking, but can you really afford NOT to do it?

If you break down the project into a few key considerations and partner with a proven provider, this could be the year! But in order to fully maximise the benefits of AP automation (and avoid the pitfalls), here are 10 factors you should absolutely keep in mind, when evaluating your options:

Examine and document your existing Accounts Payable processes so that you can easily communicate how invoices are received, the format they arrive (e.g. Paper, EDI, email, etc...), how approval routing is completed, how invoices are coded, how long invoices must be retained and how PO vs. Non-PO is processed just to name a few. Keep an open mind to new processes–the application of best practices will save enormous amounts of time and effort!

Understand the cost benefit analysis associated with your project. What is the Return on Investment (ROI) you should expect and how many months until the project pays for itself? Take the time to really understand the ROI calculator being utilised and err on the conservative side to ensure that the numbers are as accurate as possible.

A cost benefit analysis that your Controller or CFO buys into, is a project with a much greater probability of approval. A fully integrated AP Imaging and Workflow automation solution will cut your AP process costs by 50%. You can't afford NOT to do this... Really!

ERP Integration is extremely important to the success of your project ... this cannot be emphasised enough. Understand the options available for the solution selected and ensure that your expectations match what the new system actually delivers. Some systems add transactions to your Accounts Payable module realtime and validate against the most current vendor and GL data, while others require staging tables and nightly batch uploads.

Also, make sure you understand how document images may be attached and retrieved from within your accounting system. The level of ERP integration can stifle organisational adoption and greatly influence your staff's satisfaction with the system.

Indexing Options vary widely from one OCR (Optical Character Recognition) application to another. Some systems require templates be setup for each vendor where XY coordinates are utilised to indicate the location of an invoice#, invoice date, PO#, etc. Templates are tedious to maintain and accuracy degrades over time.

Other systems read the invoice much like a person reads an invoice–labels like vendor, invoice date, remit to and amount are identified and associated with corresponding data values.

Imaging as a Service may be the best approach for your organisation. Invoices are sent directly to the scanning (or imaging) service bureau via lock box or PO Box for processing. The service bureau will open envelopes, remove staples and paper clips, sort the invoices by type, scan, index and validate the invoices to then be transmitted directly to your approval routing engine. Your AP environment is now paperless without the worry of filing, storing, tracking retention dates and managing document destruction.

Is your organisation's current Accounts Payable workflow structure Centralised or Decentralised? Are invoices processed in a single location? Will scanning take place at remote locations? What are the software and hardware considerations across the organisation?

Often times, an efficient method of aggregating invoice documents is to "capture" (scan only) at remote locations, but perform the OCR processing at a central or corporate AP office location.

Do you have Historical Documents that are present on shared drives, various folders and individual workstations? You may have a rudimentary scanning mechanism in place that images documents but doesn't index or archive documents efficiently within a robust enterprise content management repository.

These historical documents should be migrated over to your new solution's ECM repository.

Document Security and "Audit Ability" are paramount to Accounts Payable Automation Solution. Documents must be archived and secured by company, division, department, group, individual, etc. to ensure that only authorised personnel have access to documents.

Consider the preferable type of licensing for your organisation, Perpetual Software License or Software as a Service (SaaS). SaaS continues to gain more and more momentum; cloud-based systems are easier to maintain, upgrade and deploy that an on-premise option.

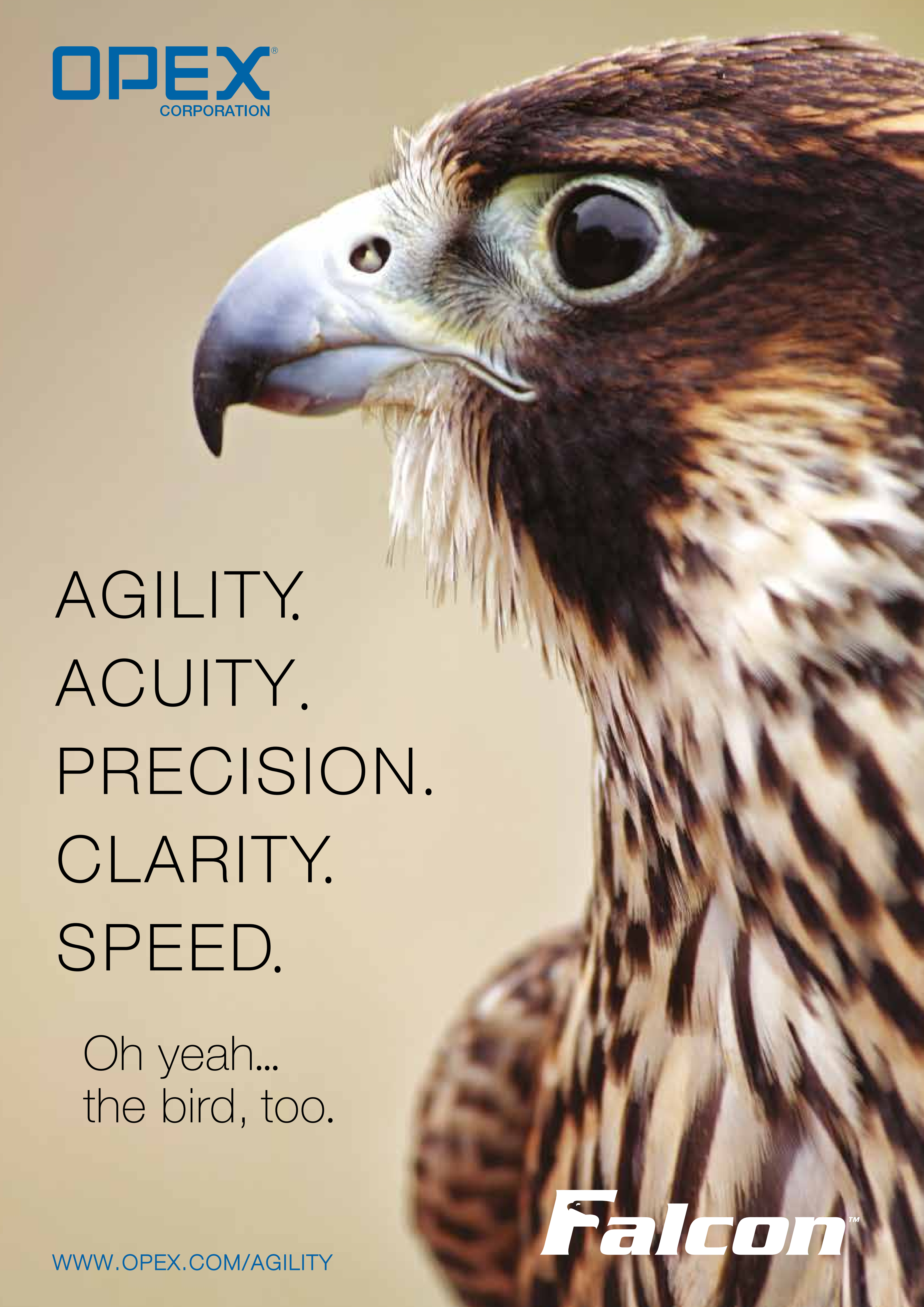
However, running a 5 year total cost of ownership analysis against licensing options under review is an important part of your due diligence. If you have a full IT team in place already, an on-premise implementation may be more cost effective.

And lastly, the Implementation Resource Requirements is a consideration that must be quantified early on within your evaluation process. Your solution provider should be able to produce a detailed document which breaks down the effort requirement for IT and business user personnel over the course of the implementation.

Keeping these key considerations in mind, a well-planned and managed Accounts Payable Imaging and Automation project can actually be a pleasant, enjoyable and very rewarding experience.

An increase in efficiencies, along with a 50% reduction of AP process costs, shouldn't be pushed out to next year!

Vance Talbot is a Senior Account Executive with Ascend Software, which offers a financial automation suite that integrates with most leading ERP systems. vtalbot@ascendsoftware.com



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What is Master Data Management?

By Guy Holmes

I am hearing much about Master Data Management (MDM) from all industry sectors. Not just oil and gas but commercial organisations, software providers, miners etc. On my quest to be able to talk intelligently about it over dinner with my nerdy database friends, I decided to create *"MDM for Dummies"*. What follows is not for dummies, but for you – the intelligent and worldly reader.

Master Data Management is the policies, standards and tools for consistent management of an organisation's data. The basic goal of MDM is to provide one version of the key business records – a single point of reference. It includes the policies and processes on managing and accessing the data from or within that single source.

PPDM vs MDM

MDM is a concept or "way of life", whereas the PPDM data model (created by The Professional Petroleum Data Management (PPDM) Association) is far more tangible. PPDM provides the place to live the MDM dream. PPDM frequently exists where MDM does not. Conversely, MDM can never exist without a database built on PPDM or a similar specification.

MDM seeks to manage all key business data across the enterprise in a single point of reference whereas PPDM has restricted its model to areas relevant to the E&P industry.

The MDM concept is relevant to any company, whether they sell guitars or explore for oil, whereas PPDM is limited to one industry. Because MDM is a way of life, it can be applied to any business.

Consider a company that sells guitars. Their core business information might consist of the models they sell, their customers and addresses. Without a consistent system and process of managing this fundamental information, they won't be selling many guitars or be in business for very long. It is easy to see the wide reach that MDM might have.

A PPDM database performs the physical function of storing core business information. Let's consider well data. PPDM enforces a unique well identifier, a set of coordinates, total depth, etc. for each well.

These foundation blocks are critical to a myriad of data and metadata that is related to this well. If information is wrong or incorrectly duplicated elsewhere, the flow-on effects can be massive across the organisation.

What data is "Master Data"?

Much of the data we have in our businesses probably does not qualify as master data. Well production statistics and the location of a drilling rig in transit are more transactional in nature than master. The key difference is that master data elements tend to repeat in other data sets, and therefore consistency is key to quality. Getting these building blocks right and tightly controlling their policies provide the backbone for many other data sets.

The use of the PPDM model itself has had the same obstacles as one would find getting an MDM system in place and management buy-in for changes to fundamental systems are never easy to get.

I believe this is less from the cost of doing it, and more from the distraction and disruption that management sees in implementation.

PPDM has managed to convince software vendors in the oil sector to use the PPDM model as part of their underlying software solutions, and this has meant that companies end up using the PPDM model because they purchased a software product that uses the model under the hood (a nice bit of stealthy work from PPDM).

However, I do wonder how many companies then end up using the underlying database structure that PPDM provides as a sort of MDM central repository? How often do people using OpenWorks link the database to the Petrosys PPDM Compliant Database so the two applications share the data? In my view, the decision to join and maintain and manage that share is the start of the MDM style of thinking. In fact the decision to integrate these two databases is fundamental to the whole MDM concept.

How do you get MDM buy-in?

It is probably safe to say that most medium to large oil and gas explorers would benefit from MDM. However, the problem most of us face is convincing management of the need and value of an MDM solution and more importantly the MDM way of life.

MDM is a great idea and using PPDM as part of that system is even better. But as we all know, getting approval for something as game-changing as an MDM policy and tool set is where the whole thing starts to get shaky. If you want this to succeed, biting off more than you can chew is not a good idea. This is definitely an "eat the elephant one bite at a time" moment.

As with any project, start with a whiteboard, a few work colleagues who share the passion and a strong cup of coffee. See what a small scale project might look like. Find something with a significant impact that management will see. If they don't understand the value proposition, traction will be slow. It must make their life easier or solve a recognized business problem.

Ideas for a good MDM starting point

Let's say an oil company intends to explore in North Africa. Start the MDM process rolling while the data is being assembled. It is a time of few preconceived ideas about the data and how to assemble it; everyone wants to just work with the best available data.

MDM with a PPDM backbone would help resolve the usual disparate data sets that start to evolve as drilling, regulator compliance and production each create their own operational databases. Help them all, show impact and make your life easier (in the long run) by getting them to use an MDM source for the key data sets in their projects. It is far harder to rope them back into a system you make if they have already started their own.

Getting noticed

Ensuring an MDM project's success is no different than any other project. Organise the project including scope and stakeholders, plan the work and associated schedules, set achievable objectives, gain management buy-in and manage for success.

The one thing about MDM that can ruin your chance of recognisable success is that it can solve problems by stealth. No siren goes off when you get to the end, and the organisation will likely not see an immediate game-changing impact.

MDM is more likely to make long-lasting differences that benefit many, get noticed by few, and reward management and the business more than the individual who kicked off the initiative.

Guy Holmes is a Sr. Vice President - Asia Pacific - Katalyst Data Management, Founder SpectrumData, DataReSource, and BeyondCool, with extensive experience in the oil and gas, minerals, medical, and information management industries in Australia and the Asia Pacific. This article has been reproduced from the recently published Volume 2, Issue 2 of the PPDM Foundations Journal for 2Q2015.

ECM for temps & moonlighters

Sean Nathaniel, Chief Technology Officer of Upland Software and General Manager of the company's FileBound ECM division, wants to foment a revolution in the way organisations plan, manage and execute work.

Upland is developing secure cloud applications to handle the reality of today's decentralised Workforce. In fact a recent McKinsey study found that 34-36% of the American workforce now consists of freelancers, including temps, moonlighters and independent contractors, and that number is expected to hit 40% by 2020.

"Organizations have not adapted to the way individuals want to work today," said Nathaniel.

"We know work will be accomplished by decentralised teams and these teams will be transient in nature. They want to work within fluid organizations, which is difficult when people are still accessing data in spreadsheets. They want to utilise technology delivered through the cloud and available anywhere on any device."

However departmental silos and disparate systems in the enterprise make achieving this objective difficult.

Upland has been focussing on enhancing the use of automated forms and workflows in the FileBound ECM in recent years, as it saw users found more value from automating the flow of their work than simply managing the work.

"If you look at most of the processes in an enterprise today, they're driven by some type of data entry. Enabling forms capability that takes the initiation of the process outside of the company's four walls and closer to the point of origin was a key aspect to maximizing value for our customers."

"We also wrap the process automation with analytics that gives you insights into process optimisation. Traditionally you had to plug a third party solution to get the insights into improving your business processes."

Many organisations are keen to exploit the potential of automated forms and workflow, but not ready to adopt a full ECM solution, something Upland has tapped into with a modular approach.

"There are occasions where it makes sense to integrate two or more products to solve a problem. We have a customer who's been using our portfolio management solution for capital expenditure planning, and most of the portfolio management solutions lack advanced workflow. ECM systems have great advanced workflow, but those customers would never buy an ECM solution. We've taken the FileBound workflow, tied it into the portfolio management solution to provide the exact flexibility that customers need."

"We're seeing many such use cases, and are delivering integrated

Upland Software CTO Sean Nathaniel.

solutions to meet that need – it's our customer driven innovation strategy."

"Another example is in project management; customers struggle with capturing and managing ideas – the ideation process. In a world where ideas are coming in from customers, partners, vendors and others, how do you add them to your development process? How do you get all those in a process that organizes them before you put them into a project management solution?"

"We're enable customers to use FileBound's forms capability to capture all of the ideas, put it into a workflow, group them, rank them and through that workflow process, add them to the project management system."

"From a compliance perspective, our philosophy is to get the content into the system, and through the workflow processes identify content that needs to be classified and make sure the customers have visibility into the content and the content types of the system."

Rather than the records manager being at the front end of the process they're more in the middle where you're using rules and intelligence to identify content that should be reviewed or looked at. Upland is pursuing a platform agnostic future for FileBound ECM on-premise or hosted in the cloud with an identical licensing model.

"We're taking that entire discussion out of the way so that we can adapt to the way the customer wants to deliver the solutions that they need."

"If you're looking at automating processes that are going to drive efficiency in your organisation and deliver that quickly and continuously, that's where FileBound fits".

ABBYY unveils Mobile Capture SDK

The 2015 ABBYY Northa America Technology Summit was held in California in November, where a team from ABBYY Australia was joined by local distributor ACA Pacific and channel partners to experience the latest developments in data capture and data analytics.

New announcements from the ABBYY R&D team, which includes over 500 engineers, came in the field of mobile capture and integration into Web platforms. ABBYY also revealed details of its next release of recognition Server, Version 4 (see story opposite).

Sushil Gajwani, Sales Manager for ABBYY Australian distributor ACA Pacific said, "It was great to see firsthand how actively ABBYY is focusing on the Mobile Capture market and Semantic Understanding of Natural Language technologies while maintaining dominance and enhancing its traditional OCR and Data Capture offerings."

A realtime Mobile Capture SDK that works within the viewfinder of a smartphone was announced at the Summit. It is designed to enable the creation of applications for instant mobile data capture, translation or simply plain text OCR.

ABBYY will offer the realtime capture platform as a core technology, while looking to its partners to develop solutions for mobile parsing and backend integration.

Performance benchmarks for text recognition on typical Smartphones were announced: for instance 1-2 lines of text in the

(Continued opposite)

Agility essential for data-driven future

By Yury Koryukin

Each year ABBYY holds numerous International Technology Summits, where we share our latest product innovations and future technology roadmaps with our partners and developers.

The latest event was hosted by the ABBYY North American team at the remarkable Hotel del Coronado in Southern California. When it was built more than 125 years ago, the five storey resort was the largest wooden structure in the United States. In 2015 it's still the second-largest according to Wikipedia.

Unlike many of the buildings of that era it has been reinvented and revitalised for the modern era, mixing the finest of contemporary technology with the highest standards of quality and architecture. This made it a fitting setting for the 2015 ABBYY North America Technology Summit.

We at ABBYY have millions of users around the world processing billions of pages every year and increasingly they need the ability to go mobile. The number of mobile users exceeded desktop users two years ago and is still growing at the same speed. The number of enterprise mobile applications is expected to quadruple by 2016 and ABBYY's mobile business has been growing annually by 30% over the last few years. Even greater rates of growth are forecast in the future.

The bad news is that while the volume of documents and data is growing exponentially, the demand for speedy processing and massive storage are increasing as well. In days gone by we could leave the customer to take weeks to make a decision whether to open a new bank account or purchase a new insurance policy. Market research now tells us that when a potential customer completes a request via your web site, you need to respond within 10 minutes to ensure "conversion."

Dealing with customers who have already arrived at our Web site is a known challenge, however an even bigger data challenge comes from dealing with the "unknown unknowns – the ones we don't know we don't know," as a famous American once referred to the problem. We don't know what exactly our current and potential customers are writing in social networks, even though they are addressing us with their opinion about our products and services. Sometimes we don't even know what knowledge we have in our internal resources as the person who created it left the company or moved to another position.

Semantic technologies such as ABBYY Compreno can now help us to understand text and extract valuable information from unstructured documents.

ABBYY Smart Classifier combines text- and semantic-based classification to power governance policies for content, records, and email management, data migration and document review. ABBYY InfoExtractor addresses critical needs in Case Management.

Today, across many industries we are seeing significant digital transformations in our lives and in business.

In a world of Uber, Amazon and AirBnB, we are now booking flights and accommodation and buying our books and CDs online. Our banks are not banks anymore they have virtually become IT companies with bank licenses.

Organisations are dealing with escalating volumes of unstructured data, trying to classify documents, extract information and populate tables in databases to render it usable. In addition to this they need to comply with government regulations while protecting commercial data and protecting customer privacy.

Semantic technologies such as Compreno are showing the way forward for innovative ways to deal with masses of unstructured data, letting them automatically process claims, find relations between different entities and automate classification.

Given the huge volumes that organisations must now deal with, it is essential that we develop ways to automatically monitor and process customer feedback, complaints and requests. We need to enhance the efficiency of text-heavy business processes, and more effectively manage risk in complex transactions.

To ensure your organisation is still standing proudly in 100 years, it's important to be open to innovations and adopt them fast enough to be ahead of your competitors.

Yury Koryukin is Managing Director of ABBYY Australia centre of the screen can be captured in less than 0.2 seconds, while a full Smartphone screen capture may take 1-2 seconds. (The benchmarks are for Smartphones such as the Samsung Galaxy A5.)

One of the challenges of capturing data from mobile phone screens is the number of stages to go through:

- Receiving a frame from smartphone's camera, focusing, etc.
- Analysing the frame, converting to grayscale and detection of text segments
- OCR of detected text
- Translation of text
- Finally, drawing the results on the Smartphones's screen (with motion compensation).

Easy and seamless capture of receipts on Smartphones is the Holy Grail of mobile capture. It has huge potential for Consumer Loyalty and Rewards programs as well as corporate/personal expense management.

The challenge is to establish templates that recognise the wide variety of invoice formats in use across the retail and business spectrum.

ABBYY is beginning by incorporating the standard invoice templates of leading US retailers and merchants such as Walmart, Costco, Target and McDonalds.

At the Summit, ABBYY also demonstrated how some of its biggest international customers are tackling the future and replacing legacy systems and processes

Purolator, one of the larger local courier companies in Canada and a subsidiary of Canada Post Corporation, had a major headache with waybills, the document used as a record of movement of items. It needed to scan between 25-45,000 waybills per day, and 50% of these waybills need to be processed within 8 hours of receipt.

Purolator handles more than one million items daily. It has more than $US1.5 Billion annual revenue and 11,000+ employees.

To solve the problem, Purolator has adopted an ABBYY data capture solution using a distributed 100-core FlexiCapture 11 deployment.

All waybills are now scanned and saved electronically and Purolator is shredding already scanned pages. The streamlined solution has also provided full PCI compliance.

Recognition Server 4.0 adds SharePoint smarts

ABBYY has added new facilities for managing SharePoint Libraries to the latest version of its solution for document capture and optical character recognition (OCR).

ABBYY Recognition Server 4.0 is a server-based solution for automating document processing in enterprise and service-based environments. Version 4.0 is designed to automatically convert large volumes of paper documents or document images into fully searchable electronic text suitable for business processes such as document archiving, e-discovery, and enterprise search.

ABBYY Recognition Server can now traverse a tree of nested folders or a document library in Microsoft SharePoint, convert discovered image files into searchable formats, and reproduce the entire library in a searchable form. Newly added files that appear in the library can be processed automatically. Thanks to its enhanced integration with Microsoft SharePoint, ABBYY Recognition Server can convert document images and scanned PDFs directly within SharePoint libraries, making work with documents more effective for SharePoint users.

A special mode of technical drawing processing has been added in this new version of Recognition Server. When working in this mode all graphic objects will remain unchanged however both horizontal and vertical text on the drawing will be recognised.

Another new feature is the ability to process files by mask. The administrator can now select types of files (for example only TIFF and JPEG files) or define a mask for names of files that need to be converted. Files that do not conform to the mask can be moved to a different folder, stay in place or be copied directly to the output location.

This allows for the creation searchable archives that completely "mirror" the structure and content of the original archive. The whole variety of documents from the original archive (including images, Word, PowerPoint and Excel files) will be recreated in the output archive; however the static document images will be replaced with their copies in PDF or another searchable format. During PDF conversion, ABBYY Recognition Server can intelligently detect PDF files that require OCR processing while leaving untouched PDFs that already have a text layer. When converting PDF files into archiving formats such as searchable PDF or PDF/A, ABBYY Recognition Server will inject a text layer into them while keeping intact the image quality, metadata, bookmarks, annotations, attachments, and other features of the original document. ABBYY Recognition Server also extends support for digital archiving standards by supporting PDF/A-2a, PDF/A-2b and PDF/A-2u formats.

With the addition of an SQLite database and enhanced fault tolerance mechanisms, ABBYY Recognition Server 4.0 has become more robust and able to consistently handle high workloads or serve multiple clients within one installation. This makes the software suitable for extensive and enterprise-wide document conversion projects.

Easier integration with information systems is enabled by allowing importing and indexing to be assigned via Active Directory user groups.

Recognition Server enables automated, unattended processing which can be centrally managed and accessed from multiple points within the organisation or remotely. Recognition Server can also connect with a variety of back-end systems and third-party applications with integration via Scripts, XML tickets, a Web-service API, or a COM-based API. ABBYY intelligent OCR and PDF conversion technology delivers highly accurate document conversion with recognition of up to 190 languages.

ABBYY Recognition Server 4.0 is compatible with Google Search Appliance, SharePoint Server and Windows Search via connectors available as Add-on modules. When using Recognition Server together with enterprise search systems, image-based documents such as faxes, scanned agreements, contracts, correspondence, and any other TIFF, JPEG or PDF files can be easily converted into fully searchable data for easy access by enterprise search tools.

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

Preventing data leak errors with OCR

With almost half of data leaks now coming from accidental exposure by employees rather than outside hacks, ABBYY has moved to plug a gap in traditional Data Loss Prevention (DLP) with a newly released integration with Symantec's DLP solution.

Symantec DLP can now incorporate ABBYY's Recognition Server OCR technology to recognise text in scanned images and screenshots

DLP has grown in prominence in recent years as organisations have attempted to monitor or block the transfer of sensitive or critical information outside the corporate network. The term is also used to describe software products that help a network administrator control what data end users can transfer.

The importance of this sector was demonstrated in Symantec's recently reported financial results, where Data Loss Prevention (DLP) product revenues grew by 37% year-on-year.

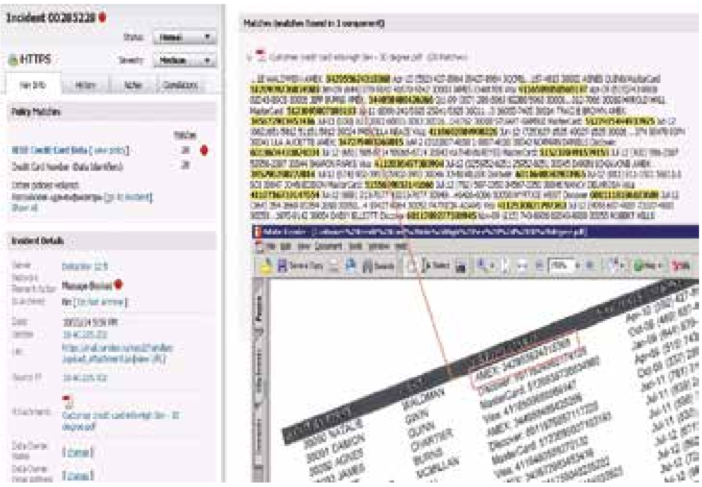
The InfoWatch Analytical Center described 2014 as the "year of personal data megaleaks". InfoWatch is a leading DLP vendor that also produces the annual Global Data Leakage Report, which in 2014 registered 1395 cases worldwide, 22% more than in 2013. It found that banks - along with Internet services, retailers, and health care institutions - are the biggest sources of personal data leaks. The report's authors found that almost half of all reported leaks in 2014 were accidental.

Many DLP vendors still struggle with preventing leaks via images, screengrabs and scanned documents. One of the reasons that few DLP vendors offer integrated OCR support is the potential impact on network performance of realtime scanning of every image contained in emails or as attachments .

ABBYY Recognition Server

The ABBYY solution offloads the processing to the company's Recognition Server product. Presently this must be located on premise on single or multiple servers although ABBYY has announced plans to also integrate with its cloud offering at http://ocrsdk.com in the future. More than 190 languages can be recognised, including CJK and Arabic.

A common application of DLP is to flag or block documents that contain certain keywords or standard formats such as credit card numbers, Medicare Numbers, etc. ABBYY Recognition Server 4 is able to extend this with its ability to recognise mathematical and chemical notation in technical drawings. One of the first international customers for the combined Symantec-ABBYY DLP solution is Russia's HOST Group of Companies, which is using it to protect critical data at a nuclear power plant.



An example of DLP with OCR blocking the transmission of a PDF containing credit card numbers

The company works with sensitive information in multiple formats, including technical drawings, specifications, reports, and industry regulations. Any attempt by users to upload such information, including document scans, to file storage, or remove it from the company's premises must be tracked and dealt with. Fast optical recognition of documents reduces the risk of leakage.

The joint solution offered by HOST, Symantec, and ABBYY monitors information placed in the company's file storage systems.

Documents are checked for certain key words and phrases (e.g. "confidential," "restricted information"). Also documents containing sensitive information are removed from file storage and replaced with an administrator-defined text label.

Responsible personnel are notified whenever a restricted document is detected and access history by all users is automatically recorded.

A spokesperson, the Technical Director of the HOST Group of Companies, said the "solution doesn't depend on the file storage server's productivity as the resource-intensive OCR process take place on the ABBYY server. Within this architecture any amount of processing stations can be connected in order to establish a desired level of productivity.

"The OCR process will not generate a delay for Symantec DLP net blockage modules. There is no need for modifications in architecture, no impact on the detection servers' productivity or need for creation of DLP special policies."

ABBYY's Server Manager can manage dozens of Processing Stations connected to it and effectively distribute the workload among them. The processing speed is dependent on the number of CPUs that are licensed, and is quoted at around 8 pages per minute per CPU by ABBYY.

Recognition Server also provides the flexibility to allocate single cores on specific CPUs of network computers for OCR processing. This allows prioritization of OCR tasks, leaving DLP dedicated servers doing DLP analysis.

Henry Patishman, Sales Director for ABBYY Australia, said, "The addition of ABBYY OCR technology to the Symantec DLP solution opens up new possibilities in protecting the privacy of confidential information.

"Organisations will now be able to prevent the flow of graphical information from their networks without impacting users with annoying time lags."

Records Management & Big Data

By Rolf Green

Working across a number of industries over the last few years it always surprised me that Big Data projects either struggle with meeting records management requirements or ignore them altogether. My surprise comes from the fact that not only is Records Management a compliance practice, but it is one that can literally pay for itself.

Big Data was coined by NASA as a term to describe data sets too large to analyse. It has since become a way of describing the problem of cost-effectively managing the large amounts of data regularly found in today's financial and mining companies. And Here the data size is growing enormously; not only due to the natural increase in business growth, but also through the adoption of social media and through supporting the Big Data analytics.

So where does Records Management come in? Too often Records Managers are seen as the company librarians hidden away, or as a compliance roadblock telling you what you can't do. What is not appreciated is that Records Managers have been fighting the storage battle for a lot longer than IT. Be it physical or digital storage the desire has always been the same; store what is needed, store only what is needed, keep it available and keep it cheaper.

Then came the storage revolution. Seemingly overnight the amount of storage in your common PC was the same as the RAID server you were running as a document cache, and we moved from talking about gigabytes to petabytes. Storage became cheap, microfilm and magneto-optic disks became museum pieces, and the old techniques were forgotten behind IT's increasing responsibilities and reduced budgets.

Today, however, data usage has grown to the such extreme levels that companies are again being forced to focus on storage. Even with the move to Flash storage and the lower costs it promises there is still a realisation that growth in data production is growing well in excess of the decreases in storage costs.

Enter the Big Data problem. In trying to gain competitive advantage through enticing new customers or reducing operational costs, companies have been building Data Marts, Data Warehouses and Data Lakes. To achieve this, Big Data systems are built and data is sourced from client systems, and herein lays the heart of the problem. Copies of data are expensive, become unmanaged and in some cases stop being copies and are new records that become unmanaged. The solution is by no means easy, especially if you are already well down the Big Data path. The first step is realising that you do not have to reinvent records management to solve this new issue. Borrowing from the techniques of the past we find that a better appreciation for the concept of archiving, as opposed to off-loading or backing up, can be a saviour. When matched with a clear meta-model that allows tracking the source of truth for data across the lifecycle it will allow synchronisation as well as drive discovery across client systems, archives, and analytics platforms.

Sure there will be some new patterns applied, as is always the case with new and more capable technology, but Records Managers have been doing this for a while and may just surprise you with how quickly they can adapt.

Rolf Green is a 20 year veteran of the storage war having driven Records, Information Document and Content Management solutions for companies across more than thirty countries. He has consulted to industries including Mining, Oil and Gas, Utilities, Aviation, Finance and Government and currently holds the role of Head of Records Governance and Data Compliance for the ANZ Bank in Australia. He will be presenting on *Recordkeeping in a Big Data world - Reinvention or re-adoption?* At the *7th Annual, National Records and Information Officers' Forum 2016*, Melbourne Convention & Exhibition Centre, February 22-25, 2016. (The comments here are that of the author and not of ANZ Bank.)

Smartgoup flies into Concur cloud

A move to the Concur cloud-based accounts payable (AP) automation system is paying dividends for Smartgroup Corporation, an ASX top 300-listed company with over 350 staff throughout Australia, saving time and money by eliminating manual processes using Concur's automation technology.

Smartgroup commenced as a start-up in 2000 and has grown quickly to an $A80M p.a. revenue business. It offers salary packaging administration, novated leasing, as well as fleet management services to Australia's largest employers, predominately Commonwealth and state governments and major public health groups.

Smartgroup has also acquired multiple businesses in the last several years to complement its offering. These acquisitions resulted in multiple legacy systems and processes, including payments.

Making the move to the Concur cloud AP platform helped free up its staff from having to manually enter data relating the business's invoices from multiple business units and locations. This manual activity was a necessity with the business's existing infrastructure, but with the Concur technology, it was able to integrate automated systems into its processes to reduce the amount of manual labour needed.

Smartgroup's financial controller Anita Nicole Sanchez said, "When you are a large company with thousands of invoices a month it's likely you will have a dedicated AP team for processing, review and approval. As a continuously growing and evolving business, staff were being diverted from adding value and support to the business because they were occupied with tasks such as keying invoice data. Implementing the Concur AP platform has freed our resourcing so our staff can spend more time with the business by cutting back on the risk of redundant and non-value added activities."

"The Concur system has also seen us yield a 90 per cent reduction in paper for invoice processing. Previously, while 70 per cent of invoices arrived by fax or email, they would still need to be printed off, put into a manila folder and then placed on someone's desk for approval. The move to all-electronic workflows has eliminated the problem of lost invoices.

"Our staff can now see the progress of an invoice at any time and the system includes real-time reporting. Previously our finance team had to toggle between different systems to determine the status of a transaction when a supplier called. Now we have one system with full visibility and Concur can also manage storage of invoices," she said.

Anita Nicole Sanchez , Smartgroup financial controller

One of the reasons SmartGroup chose the Concur platform, according to Sanchez, was for its customer focus and the additional services it offers, such as the Travel and Expense package.

"We have a large IT team developing software solutions for a range of our offerings such as Salary Packaging. We want them to continue to focus on providing end customer value. That's why we selected a business partner who invests this same level of enthusiasm into their customer experience and solutions offering" she said.

4 Ways a DMS can Improve the Auditing Process

By David Wiggins

At this year's InsideNGO conference, Debby MacLeod, Audit and Assurance Principal at accounting firm Clark Nuber PS recently shared her perspective on how a document management system can simplify the audit process for both parties. She discussed 4 key areas of audit focus along with controls you can put in place that will help you pass with flying colours.

Auditors are looking for inconsistencies, inefficiencies, errors, and incidents of unethical conduct in your company. A minor mistake can cost you hundreds of thousands of dollars. A major one can shut you down.

Here are the four main compliance categories where MacLeod says you need to be perfect:

1. Access and Authentication

Primary Concern: Proper approval and authorization of contracts, agreements, payment reports, and other similar documents.

What should you do about it?

- Appropriate logins and passwords to restrict access
- Implement timed lockouts
- Include lockouts for failed login attempts
- Lock documents for editing after approval
- Retain the "envelope" for electronically signed documents
- Don't put faith in email – email approval is WEAK audit evidence

2. Document Management

Primary Concern: Availability and access to complete and accurate records.

What should you do about it?

- Make sure documents are searchable and retrievable

Organisations lack insight into legacy data

Do you know where your backups are? If not you have company. A global survey of 720 IT administrators by data recovery expert Kroll Ontrack found 30 percent of respondents do not have clear insight into what specific information is stored within their tape archives.

It shows organisations are putting themselves at risk for legal action and/or financial penalties due to an inability to quickly target and retrieve data from legacy tape archives. This is problematic because these administrators are regularly asked to restore data in response to compliance, investigation or litigation requests.

"Most organisations are required by law to keep and maintain access to regulated data for a designated period of time," explains Todd Johnson, vice president, Data & Storage Technologies, Kroll Ontrack.

"Therefore, maintaining access to legacy data and having the ability to quickly respond to data requests is crucial. Overstrained IT resources and the fact that nearly one-third of organisations struggle to even know or understand the data stored on their company archive or backup tapes is a real challenge and could put an organization at risk if they are unable to produce in a timely manner."

The study was conducted in the US, UK, Germany, Austria, Switzerland, Italy, Poland, Singapore and New Zealand and included responses from 720 IT specialists from corporations and IT service providers.

The results demonstrate that IT administrators are regularly under pressure to access, identify and restore specific data from archive tapes, whether to support an internal investigation involving legacy custodian data, to respond to a regulatory request from a government agency, or as part of an ediscovery matter involving archived data.

In fact, 30 percent of the participants receive restore requests daily, weekly or at least monthly, and another 32 percent are asked to restore data from tapes at least multiple times a year. However, 22 percent of participants confirm that they cannot respond to restore requests as demanded by their organization and cannot consistently locate and access the desired data.

When asked about the barriers to having clear insight into what information is contained in their tape archive, IT administrators cite the difficulty and time consumption associated with accessing or viewing tape content (43 percent), the fact that their organization no longer has the infrastructure in place (software or hardware) to access the legacy tapes (24 percent), the expense of maintaining legacy infrastructure (18 percent) and damaged tapes (7 percent).

Additional key findings from the study include:

- **Backup Protocols:** Almost two-thirds of respondents (62 percent) archive data daily, but 38 percent do not. In fact, 13 percent back up their data only monthly or less, posing serious risk to their organization as they could lose data for a period of a month or even more and have no viable backup.
- **Legacy Tape Abundance and Age:** Thirty-four percent of participants store more than 100 legacy tapes in their organization – that includes 12 percent who have more than 500 tapes. Further, over half (56 percent) of respondents manage tapes that are older than 5 years, while 34 percent manage tapes 5 – 10 years old, and 21 percent manage tapes which are older than 10 years. Even though the age of tape medium is not a certainty for tape damage or data loss, in combination with many read and write passes, poor handling during storage or the lack of the correct hardware or software can pose serious issues.

"With the variety of backup and tape solutions used by organizations, getting a handle on effective tape management and establishing processes to quickly respond to data requests rests on two tape management best practices: identifying the quality status of your tape archive and having knowledge of the data stored within the archive," said Johnson.

"Organizations are wise to audit their legacy tapes and catalogue the information and location of the data stored on them. As this can be a costly and time-consuming task, we're seeing demand for an easy-to-use solution to consolidate catalogues from various systems and mediums into a single, searchable inventory."

- Set up a consistent document retention period, so documents are available upon request during an audit
- Stay up to date on Federal compliance regulations
- Establish a solid form of version control

3. Security and Integrity of Documents

Primary Concern: Protection of your documents from intentional or accidental modification or deletion, while knowing that you can access them when you need to.

What should you do about it?

- Reliable active directory management that includes mobile devices
- Limit access through use of logins and passwords
- Limit "super user" or admin rights
- Make sure to include version control
- Perform regular and timely backups
- Perform periodic restore or other tests to ensure document integrity

4. Retention and Destruction

Primary Concern: Compliance with government regulations and organizational policies to ensure documents are readily available when necessary and destroyed in a timely manner.

What should you do about it?

- Have a disaster recovery plan in place
- Make sure your record retention policy addresses electronic documents and data
- Establish a process to monitor compliance with your policy
- Destroy records/documents in an orderly and timely manner, and in accordance with your policy
- Make Sure You Are in Control of Your Files – Not the Other Way Around
- Adequate audit evidence revolves around having consistent control over the conversion and maintenance of original documents, and auditors need this to move forward on the items listed above. The auditors will test these internal controls. Make sure they're tight.

David Wiggins is Chief Technology Officer, Document Advantage Corporation http://www.docuvantage.com/

EzeScan

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EzeScan is Australia's most popular production document scanning software solution and product of choice for many Records and Information Managers.

This award winning technology has been developed by Outback Imaging, an Australian Research and Development company operating since 2002.

With 1000's of seats world-wide, EzeScan enables its clients to substantially reduce the cost of deploying batch scanning and data capture solutions for documents of all types.

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

EzeScan solutions range from basic batch scanning with manual data entry to highly automated data capture, forms and invoice processing. EzeScan benefits include: initiate intelligent automated processes; accelerate document delivery; minimise manual document handling; capture critical information on-the-fly; and ensure regulatory and digitisation standards compliance

Kapish

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As a HP Software Gold Business Partner, we aim to provide our customers with the best software, services and support for all versions of the Electronic Document and Records Management System, HP TRIM & HP Records Manager (HP RM). We understand that it can sometimes be an all too common problem where document and records management is seen as being just too difficult.

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

As a software and services company focused exclusively on HP TRIM / HP RM, we work with customers to improve their everyday use and experience with the system. Designed to bridge the gap between users and technology, our software solutions are easily integrated into existing systems or implemented as new solutions. Quite simply, our products for HP TRIM / HP RM make recordkeeping a breeze.

Konica Minolta

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Konica Minolta Business Solutions Australia Pty Ltd is a market leading provider of integrated solutions and managed services with the power to transform the business environment. Konica Minolta Australia works with organisations large and small to provide integrated print and content management solutions and services to improve productivity, reduce costs, increase security and achieve sustainability outcomes.

Headquartered in Sydney, Konica Minolta delivers expert professional services with experienced and responsive client support, in addition to the world-class service provided through its extensive network of direct sales offices and authorised dealers.

Brother

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Trusted worldwide and always with a "Customer First" approach, Brother continuously meets the needs of consumers through a comprehensive range of quality solutions.

Committed to the advancement of printing technologies, Brother also offer business solutions designed to fit perfectly in the SOHO, SMB, SME and corporate environments.

With a skilled team specialising in assisting their customer's corporate growth, Brother's business categories such as portable printers and scanners, commercial desktop scanners and high volume corporate printers can help businesses achieve in any industry. With resellers located Australia-wide, readily available product and a locally based product support team, Brother is always 'at your side'. Contact the Brother Commercial Division today to find the best solution for your business requirements.

Knowledgeone

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Knowledgeone Corporation has been a leader in the Australian Records and Document management sector since 1986 when the very first RecFind was released. Our latest product RecFind 6 is a fully-featured Enterprise Content Management solution used by customers all around the world for:

- Physical/Paper Records Management;
- Electronic Document Management; Document Imaging;
- Business Process Management/Workflow; and
- A huge variety of Information Management applications (e.g., mortgage application processing and contract management) We are renowned for the quality of our support and the robustness of our products.

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

Iron Mountain

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Web: www.ironmtn.com.au

Iron Mountain is a global provider of electronic and physical information management services for complete information lifecycle management. To make it easy and reduce costs, we provide an affordable, hosted document management platform that will suit a business' tactical needs, provide scalable low cost of entry that will grow to become your full enterprise document management platform. Our hosted, subscription-based EDRMS can be configured to suit your needs, growth strategies or specific requirements, to provide:

- Full EDRMS and search functionality in a PCI compliant environment
- Access through integrated Office desktop, browser or mobile apps
- Hybrid, VERS compliant, records management for digital and physical documents
- Email management and scanned image processing
- Document-centric workflow for approval, review or routing.

FileBound

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

ABBYY

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

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.
Designed to maximise user adoption, Objective ECM manages electronic data and information securely and ensures transparency and auditability of documents is maintained with information only accessible by authorised employees.
Objective ECM delivers a truly Connected Process Management platform that is designed to be the backbone of an organisation's information and process governance strategy.

CloudRecover

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As the newest member of the HP Information Management partner community, CloudRecover is proud to offer both HP TRIM and Records Manager in a cloud environment delivered and supported by your existing HP Partner.
While CloudRecover has over 10 years' experience as a Managed Service Provider in DRaaS and maintains over 9 petabyte of restorable data in Australia, we plan to grow the HP information management market by uniquely offering a Bring Your Own License (BYOL) or full subscription based EDRMS/ECM solution.
Our mission is to bring the benefits of a robust Information Management and Governance solution to a broader audience.
We work with existing HP partners, who remain the customer facing organisation, to meet the demands of many CIOs to deliver more and more applications hosted as a service.
Hosted in a Federal Government approved Tier III Australian Data Centre, our solution can dramatically reduce risk and improve productivity of your IT resources.
Contact your HP Business Partner or CloudRecover for a demonstration or more information.

Fujitsu Australia

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

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

UpFlow

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

DocsCorp automates file compression

DocsCorp has released a new module for contentCrawler, its integrated analysis, processing and reporting framework.

The Compression module gives IT Administrators the ability to significantly reduce large document file sizes in a content repository as an automated backend process. A content repository could be a document management system, SharePoint or a Windows file system. Reducing document file size reduces storage costs and speeds up file transfers when downloading or sending these documents via email.

contentCrawler analyzes documents in a content repository based on a particular search query and compression or OCR thresholds specified by the IT Administrator. It then processes the documents that meet the criteria and saves them back into the content repository, replacing the originals with smaller, fully text-searchable files. IT Administrators can combine contentCrawler modules into a single, multi-process service for even greater efficiency and productivity. For example, a combined OCR and Compression service would locate all the non-searchable image-based documents in a content repository, OCR and convert them to text-searchable PDFs, which would then be reduced in file size through compression and downsampling.

It is an end-to-end automated solution that runs 24/7 without staff intervention, taking advantage of 4, 8, 16 and 32 CPU cores for concurrent processing. Staff do not have to worry about OCR or Compression processes or workflows. Instead contentCrawler works in Backlog mode for legacy documents and Active monitoring for recently-profiled documents. It can also work in both modes simultaneously.

contentCrawler integrates with leading document management systems including iManage, HP TRIM, OpenText eDOCS, OpenText Content Server, Worldox, and ProLaw as well as SharePoint, and Windows file systems. The contentCrawler framework currently supports Compression and OCR processing.

www.docscorp.com

Indexing enterprise content

RAVN Systems has released a new version of its RAVN Pipeline to provide enterprise-grade indexing for its Elasticsearch search platform.

RAVN Pipeline delivers Extraction, Transformation and Load (ETL) from a wide variety of source repositories including, but not limited to, File systems, e-mail systems, DMS platforms, CRM systems and hosted platforms.

All these can be connected while maintaining document level security when indexing the content into Elasticsearch. Also, compressed archives and other complex data types are supported out of the box, with the ability to retain nested hierarchical structures.

The platform is multi-threaded, highly scalable and can index virtually anything from a single instance, which can be invaluable when indexing from cloud-based repositories or into a cloud-based Elasticsearch instance.

RAVN Pipeline is GUI driven and easy-to-use allowing non-specialists to confidently set up indexing jobs and adjust existing ones. As data is being indexed, RAVN Pipeline can enrich data, such as, auto-tagging, classification and other system call outs.

www.ravn.co.uk

Information Governance platform

Viewpointe has announced enhancements to OnPointe, its private cloud-based information governance platform. The latest platform enhancements further address the growing breadth of content sources and content types that organisations must consider when creating, implementing and executing their information governance (IG) strategies.

This release introduces cloud-to-cloud governance for OnPointe for Messaging and incorporates the handling of applications such as Microsoft Office 365.

The OnPointe platform simplifies the process of governing enterprise content, regardless of source location. Now, Office 365 content like Exchange Online, SharePoint Online, and OneDrive for Business can be incorporated into a unified governance approach. It also enables organizations to apply the same retention, supervision review, security, records and legal hold policies to all enterprise content within a unified and optimized private cloud environment.

OnPointe for Structured Data is Viewpointe's information governance solution for control of data growth, segregation and archiving of structured data sources. To strengthen IG practices and improve business results, OnPointe for Structured Data includes enhancements for connection, retrieval and analytics-preparedness (powered by IBM Watson).

With these enhancements, OnPointe customers can easily:

- Access the archive via ODBC, JDBC and APIs to maintain existing connection protocols and minimize the impact of applying good governance practices
- Create, manage and share an enterprise vocabulary and classification system in a central catalogue to drive IG alignment across functional areas
- Perform keyword searches across all managed content, to enable any user, not just database experts, to retrieve and tag relevant data

www.viewpointe.com

AccessData Summation 6.0 and FTK 6.0

AccessData Group has announced the simultaneous launches of Summation 6.0 and FTK 6.0, powered by a forensically secure database and enhanced interoperability between both products.

The newly released versions feature improvements to the shared index file, consistent de-duplication of data from both products and a new shared audit log that displays documents viewed through both applications. In addition to the enhanced interoperability, the new versions of each individual product also include improvements based on customer feedback.

Summation is a Web-based solution that combines predictive coding, advanced analytics, comprehensive data processing, early case assessment, case management, final review and transcript management into a single platform.

At the heart of Summation 6.0 is the new LawDrop tool, which has data upload capabilities similar to the popular Dropbox application. This feature gives customers the ability to upload case data into the Summation multi-tenant platform, and access it from anywhere on a 24/7 basis.

Other features of notes include the new Browser Briefcase, which allows users to load multiple documents all at once, and Active Directory Integration. In addition, Summation's Case Organizer features several enhancements that streamline case preparation, as well as faster reporting and enhanced notes capabilities.

FTK (Forensic Toolkit) is a court-cited digital investigations platform built for fast processing, stability and ease of use, while handling massive data sets.

It provides comprehensive processing and indexing up front, so filtering and searching is faster.This means users can "zero-in" on the relevant evidence quickly and conduct their analysis faster.

FTK 6.0 boasts the new FTK Web Viewer, powered by a shared back-end database with Summation. This tool allows users to conduct case assessment earlier because it allows lawyers and their staff members to have instant access to evidence in the field - on a real-time basis - as it's being identified in FTK.

www.accessdata.com

Are SharePoint BLOBs dragging you down?

By Gary Van Buhler

I might be a little old fashioned, but I came up through an Electronic Content Management (ECM) and Transaction Content Management (TCM) community where you never put BLOBs directly in your database. By BLOBs, I am referring to Binary Large Objects (not the 1988 thriller movie) which are chunks of images or other large data stored as a single object. I was taught that the database should hold pointers to BLOB content stored on another inexpensive storage system like SAN or NAS drives. However, when I entered the world of SharePoint, I realised that everyone was storing BLOBs in their databases.

You can certainly store BLOBs externally from SharePoint using EBS (External BLOB Stores) or RBS (Remote BLOB Storage) or third party solutions with pointers in your content database. My natural tendency is to recommend these solutions since they reduce the size of the database and ease the load on the database server. The result is often a performance improvement without upgrading hardware.

However, I've been advised often that it's OK to put BLOBs in SharePoint and look to hardware improvements to account for any performance effects. I've also realized that the potential downsides of external BLOBs are closely related to SharePoint issues that we frequently consult on. For example, RBS has the potential to slow down backup-and-restore, SharePoint version upgrades, or migrations between environments. (For more info, read this great series of articles by Dan Holmes – http://sharepointpromag.com/sharepoint/blob-or-not-blob).

Yet, do these considerations lead to the conclusion that BLOB storage in SharePoint is actually best practices?

ECM versus TCM

The best practices answer is, "it depends." Specifically, the correct solution here depends on the balance between and organisation's ECM and TCM needs. After 25 years in this industry, I see a clear tension between these two areas that is often ignored.

ECM solutions built for collaboration and living documents are not well suited for TCM. On the flip side, solutions designed for transactional proficiency – such as the static document processing of BLOBs – are simply not good collaborative environments (although many will claim to be). Simply put, content management focused on the end result of business operations is different than content management focused on the creation of content. The latter is intended to make knowledge workers more efficient and effective. The former should drive and record business actions and decisions. These are different goals.

The first step toward best BLOBs practices is understanding one's TCM needs and avoiding the tendency to lump these requirements in with larger ECM and SharePoint goals. Remember, TCM is a system of record for managing process-related documents (read high volumes of static documents, most often images or PDFs).

Examples of TCM targets include invoice processing, application processing, employee on boarding, insurance claims, Loan origination, patient charts, and the processing of permits. If an organisation doesn't engage in these or similar activities, then limited TCM activity and BLOB storage present few problems when stored in SharePoint.

However, for others, SharePoint may demonstrate legitimate performance issues when trying to organise and run transaction based imaging solutions alongside collaborative processes when a large number of BLOBs are stored in the database.

Let's do a little math around the classic example I've encountered among customers – scanning large numbers of documents into the SharePoint repository (the database).

1GB of disk space will hold about 20,000 images.

1TB of disk space will hold around 20,000,000 images.

1600 pages per month dumps 1 GB of data into your SharePoint database.

After 5 years you have pumped 100,000 documents and 5 GBs of BLOBs directly into your SharePoint Database.

That's a big chunk of data for a database server to handle! Note that many organisations have even drastically higher page-per-month operations further exasperating this problem. Such an organisation could spend money to upgrade the server hardware to handle the load (expensive hardware at that). However, this seems like kicking the can down the road. Why not get those BLOBs out of the database and improve performance for SharePoint's best qualities - collaboration and living document content management?

When RBS is enabled, the database size won't grow at the same magnitude with each file that's added. However, Microsoft's recommendations for database sizes in SharePoint will include the size of the database and the BLOB store, so you're not escaping their size recommendation.

From a simple performance perspective, if the files are going to be more frequently read but not revised, RBS can improve performance. If files are going to be revised frequently, then RBS may decrease performance.

With your files being stored outside of SQL, you remove SQL overhead and memory usage when requesting the files. This allows SQL to process other important tasks and queries. Also, accessing the files from a file system is faster than pulling it out of a SQL table.

Last, but not least, TCM cost should be addressed. Luckily for buyers, ECM and TCM solutions no longer needs to break the bank. Although SharePoint itself is a good ECM starter, many organisations need a more robust solution. Thankfully, recent players are causing significant disruptive pricing in this market. However, TCM in particular has been quite commoditized over the past several years.

It's now possible to run a very low cost TCM solution alongside SharePoint (which you have already made an investment in), to minimise the effects of transaction based BLOBs on SharePoint's collaborative activities, while still providing transparent access to all the content through a SharePoint unified search environment.

Gary Van Buhler is an Experienced Business Consultant currently VP, Business Development, Software Solutions at Total Solutions a SharePoint Consulting and Development firm.

SharePoint data integration tool

Layer2 has announced version 7 of its Business Data List Connector (BDLC) that connects 100+ external data sources with SharePoint lists without coding and closes many gaps that still exist with out-of-the-box SharePoint data integration.

No programming, tools or data source modifications are required to connect. The app can easily be configured in the general SharePoint list settings dialog with just a few simple settings, such as a connection provider, connection string and a common data query.

Version 7 now supports 100+ common corporate data sources, e.g. databases like Microsoft SQL Server and SQL Azure, MySQL, Oracle, Informix, IBM DB2, AS/400, Files like Excel, Access or CSV/XML, applications like Active Directory, Exchange or SharePoint (on-premise or cloud-based), ERP/CRM systems like SAP, Navision, Dynamics ERP/CRM. It also comes with support for cloud-based services like Salesforce, RSS/Atom feeds, Twitter, Facebook, LinkedIn, Google, and Amazon. Generic provider like ODBC, OLEDB, OData, SOAP or custom .NET-based providers are also supported.

The pre-selected data can be populated to the list and presented with the familiar UI and navigation features of native SharePoint lists: Views, sorting and grouping, filters, and calculated fields. Lookup relationships, managed metadata or attachments can be assigned as usual for SharePoint lists.

The Connector is available for all SharePoint Server on-premises versions and editions including SharePoint Foundation. Prospects can register and download a free Shareware Edition at the vendor's product pages.

http://www.layer2solutions.com/

Mobile forensics for Android devices

A company's email server was once the main source of collected end-user data, but now mobile and text messages are an integral part of the eDiscovery process. Druva Mobile Forensics has added a new capability that automatically and transparently collects data from an organisation's Android devices, allowing enterprise IT, information security and legal teams to easily facilitate compliance and eDiscovery requests.

Druva Mobile Forensics allows for the proactive collection of data rather than its reactive collection, meaning companies avoid having to request devices or manually copy them. This lets organisations easily and unobtrusively collect data, monitor for data compliance and place legal holds on mobile data as needed for litigation requests and regulatory needs.

In addition to collecting and preserve text messages, Druva Mobile Forensics can also collect mobile browser history, call logs, device information and more.

It automatically collects data, which can then be transferred to an eDiscovery tool for processing and review. A

dditional product capabilities include:

Data collection on Android with no end-user intervention

Druva Mobile Forensics for Android is currently available and included at no additional cost to inSync Private Cloud Elite and Cloud Elite customers.

www.druva.com/insync

Email archiving adds legal hold

Sonasoft has added the ability for automated legal hold in its email archiving and eDiscovery solutions. This allows users to retain email that has been identified by certain content criteria even after the retention period has expired.

Flagged emails are not purged and held securely until these emails have been examined and the reviewer has marked them as closed. Only after this review process is completed are the held emails released and are subject to expire if applicable.

"Several customers of Sonasoft have welcomed our automated legal hold feature in our eDiscovery platform", said Bilal Ahmed, CTO and Vice President of Engineering.

"They appreciate that all they had to do is identify criteria such as a keyword or sender in the archive. All emails that then meet the identified criteria, such as credit card information, social security numbers, insider trading information, etc., automatically are flagged. These flagged emails are never purged from the archive even after the retention policy has expired.

www.sonasoft.com

EzeScan version 4.3 supports Windows 10

Australia's Outback Imaging, the Brisbane-based software developer, has launched a new release of its flagship document capture software, EzeScan version 4.3.

This release brings with it new features and enhanced integration with a range of enterprise financials including TechnologyOne Financials and Sage 200 (UK). A new Accounts Payable Accounts Receivable (AP/AR) solution has been implemented for Sage 300 and also improved MYOB and Xero functionality incorporated in the new release.

The upgrade is free for all existing EzeScan customers on current Software Maintenance Agreements.

EzeScan version 4.3 now supports Windows 10, however support is ending for Windows XP or Windows Server 2003.

Outback Imaging has provided a word of caution to its users to check their scanner manufacturer has released a Windows 10 compatible driver before upgrading, and is providing short term EzeScan test licences to allow users to test existing scanner compatibility with Windows 10.

Enhancements to EDRMS integration have been incorporated for HP RM/TRIM and Objective.

Enhanced output functionality is now available for custom output of captured data in CSV and XML formats.

"EzeScan's custom CSV editor has been given a major workover to make it more user friendly. We now support more than two output data files and you can have a mixture of multiple CSV and /or multiple XML files if required," said Mike Kirkby, CEO of Outback Imaging.

EzeScan currently supports over 30 different barcode formats and the addition of 2D barcode support in EzeScan 4.3 provides the ability to design more data rich form capture workflows.

EzeScan's LINES module is used to automate the process of line item data capture. Enhancements to this module in Version 4.3 include:

- Simplified new template creation
- Improved grid and column detection
- Text replacement for input and output columns
- Set OCR confidence threshold to facilitate auto-processing and exception handling.

www.ezescan.com.au

Esker Dynamics NAV ERP integration

Esker has announced the availability of a new solution integration for Microsoft (MS) Dynamics NAV ERP, providing greater process efficiency and productivity across vendor invoice operations. Esker's Accounts Payable automation solution provides a single solution for document processing — directly into and out of MS Dynamics NAV — to automate, streamline and simplify accounts payable (AP) processes, including invoice verification, approval and mobile support. Based on Esker customer results, AP automation can help businesses receive and enter invoices up to 65 percent faster, lower processing costs as much as 60 percent and improve invoice accuracy up to 99 percent.

www.esker.com.au

5 ways that eDiscovery can help your business

By Martin Flavell

Electronic Discovery (eDiscovery) as a process is not limited to discovery in legal disputes. The use of the term eDiscovery has now become synonymous with the process of handling large volumes of electronic data and goes far beyond the traditional definition. Compliance, statutory regulation, internal investigations and information governance are all areas where the eDiscovery process is used to effectively identify relevant information. Here's how you can apply the eDiscovery process, outside of eDiscovery:

1. Untangle your web of data - All your data is collated and copied into a central data store. It is then categorised by type and all duplicates are eliminated. Data is created in many different forms, using a wide variety of software applications – PDF, Microsoft Word, Excel, email, etc. Often this data is duplicated, backed up and shared with others, resulting in multiple copies. There are very few limits to the organisation of data and therefore the structure it is stored in is inconsistent. When the business need arises for your data to be categorised, it is very difficult to do so without applying structure to it. This is the basic premise in the first stage of eDiscovery processing.

2. Remove the junk and find the gold in your data - Wouldn't it be great to find the gems amongst your mass of documents? Computer Assisted Review is the most recent development in the eDiscovery process and is geared towards large amounts of data – 100,000 documents or more. Using Computer Assisted Review, you can teach the software what a relevant document is for your purposes. This is done by reviewing a very small proportion of your data, then applying that same logic to the entire data set. Each document is then assigned a relevancy ranking and can then be reviewed in order of priority based on that relevancy.

3. Group similar documents together - With near-duplicate detection you can group together documents with similar text content so they can be classified together. This not only helps with consistency, but can also save you time as it is often possible to review just one document and apply the determination to the rest of the similar documents.

4. Remove those unwanted emails - Did you know there are about 182.9 billion emails sent and received per day worldwide? (source: digite.com). To reduce the load of emails to be searched, Email Threading is used to identify emails which exist within chains of other emails so they can be discarded or grouped with the rest of the email chain. Due to the nature of email communication, this can reduce the number of documents which need to be reviewed by a considerable amount, which will save you time and money.

5. Don't miss a thing in your data - You can go one step beyond standard keyword searching with Keyword Expansion. Most people are familiar with keyword searching, and with search engines at our fingertips this is now second nature. Keyword expansion uses search technology to suggest additional keywords related to those you have already chosen. The suggested keywords will often come up with terms which directly relate to your data set but which you may not have thought of otherwise.

Martin Flavell is the eDiscovery Manager at Law In Order. For more information visit www.lawinorder.com.au

ScanSnap adds new syncability

Fujitsu has released new software for its ScanSnap scanner range that provides the ability to synchronise documents across various devices, and also a receipt management capability with multi-currency support. The ScanSnap Sync software supports mobile scanning and is available free of charge for owners of Fujitsu Scansnap scanner models for both PC and Mac platforms.

Documents scanned from a mobile device using the application are automatically uploaded to a folder in the cloud. Once the user is back in the office and launches the ScanSnap Organiser software on either Mac or PC, scans are synchronised over the cloud and are available for applying functions such as OCR or paper rotation. The enhanced document will automatically be synchronised again with the cloud-based directory so that documents are available across all devices.

The free ScanSnap Receipt software, converts paper receipts into useful digital information. Supporting multiple languages and currencies, the software converts information such as the date of invoice and amount, turning information from a paper receipt into useful digital data for household books, travel expenses and other business purposes.

Peter Uher, General Manager Fujitsu Products Group for Fujitsu Australia and New Zealand said, "Through the continuous development of our scanner range we are striving to create a seamless transition between digital and paper documents. The added functionality provides great productivity benefits by simplifying everyday tasks for today's busy and mobile workforce.

"For example the new Receipt Software helps busy people to categorise and export data from receipts so that they can easily keep track of data for tax purposes and expense tracking."

www.fujitsu.com.au

"Deep Insight" into unstructured content

With the launch of a new project code-named "Deep Insight" , Canada's Adlib Software plans to exploit the capabilities of its Advanced Rendering platform, and extensive experience working with unstructured content, to elevate the "findability" of information. The company says it will address business challenges across sectors from Energy to Life Sciences to Banking to Insurance, such as securing and amalgamating claims files, performing utility invoice trend analysis or collating scientific trial results. Adlib PDF offers streamlined integration into many commonly-used repositories, business tools and Enterprise Content Management systems - including SharePoint, Documentum, IBM FileNet, OpenText and Dassault Systèmes - to enhance document management processes.

http://www.adlibsoftware.com/

Search solution for Azure

dtSearch Corp., a supplier of general enterprise and developer text retrieval software, has announced a new .NET solution for running the dtSearch Engine fully online in the Microsoft Azure cloud. The solution uses RemoteApps for secure data access of nearly any data type from nearly any computer or device.

The solution enables cloud operation of all dtSearch components, leveraging Microsoft's new Azure Files feature for dtSearch index storage. Searching (including all 25+ dtSearch search options) runs via Microsoft's RemoteApp. Using RemoteApp gives the search component the "look and feel" of a native application running under Windows, Android, iOS or OS/X. Developers using dtSearch's core developer product, the dtSearch Engine, can find the solution on CodeProject.

www.dtsearch.com

Atlassian targets business users

Atlassian has transformed its flagship collaboration product into three standalone offerings, including one for business teams such as human resources, finance, and marketing.

The Australian developed software is highly valued by software development tool for agile software teams worldwide. It is now three products that run on a common platform: JIRA Software for agile development teams, JIRA Service Desk for IT and service teams, and JIRA Core for non-technical business teams such as HR, Finance or Marketing.

The company also announced it has surpassed 50,000 customers across 165 countries with its self-service enterprise sales model.

According to a 2014 survey conducted by Atlassian, approximately one-third of respondents said they now also use JIRA for non-software development projects such as HR, finance or marketing.

While the basic principles of great collaboration run across every team, functional teams have distinct needs when they need to get things done faster, more efficiently, and with fewer headaches.

A truncation of Gojira, the Japanese name for Godzilla, JIRA began as a bug tracker for software developers. JIRA rapidly became the primary project tracking tool software teams use to manage everything from feature requests to product ideas, to problems that need fixing.

A key driver of the Atlassian Marketplace, which includes over 850 JIRA add-ons and recently surpassed $100 million in sales.

JIRA Software and JIRA Core are now available starting at $US10 per month. JIRA Service Desk 3 is now available starting at $US10 for up to three agents.

http://atlassian.com

Recall unveils one-stop governance

Recall has launched a new information governance tool to manage physical and electric records, known as CommandIG, and available as a cloud-based or on-premise solution.

CommandIG aims to provide records management, legal and IT departments with an easy way to apply consistent information lifecycle policies to documents.

Features include:

- Governance Control – CommandIG allows an organization to automatically apply retention policies to assist in complying with applicable laws and regulations. It also facilitates management from retention to disposition, as well as federated search and legal hold, across content repositories managed either by Recall or other information repositories, including FileNet, SharePoint, Documentum and network drives that reside behind the corporate firewall.
- Collaboration – CommandIG allows organizations to manage all physical and digital information no matter where it resides across the company's local, regional and international boundaries.
- Regulatory Compliance – As compliance regulations emerge and evolve in each of the countries an organization operates, CommandIG has the flexibility to keep up with and adhere to mandates that ensure compliance. CommandIG is fully HIPAA and PCI DSS compliant and ISO 27001:2013 and EU/Swiss Safe Harbor compliant.

CommandIG is delivered in three packages. The standard subscription package, suitable for small and mid-sized enterprise businesses and many departments in larger organisations, is priced at US$199 per month. Initial availability will include the United States, Australia and New Zealand with additional markets to follow.

recall.com

Physical information management for SharePoint and Office 365

Gimmal, a provider of information management software designed to make Microsoft SharePoint and Office 365 a true Enterprise Content Management system, has launched a new product for Physical Information Management (PIM).

PIM provides a way to manage any type of physical item, including storage boxes, file folders, documents and tape; apply policy to physical and electronic record; and enhance findability with unified search for electronic and physical record.

It leverages the SharePoint user experience for records actions, such as classification, deliver/pickup requests and more.

http://www.gimmal.com

kCura announces Relativity 9.3

kCura, developer of the e-discovery software Relativity, has unveiled Relativity 9.3. It enables the creation of pivot charts and tables from any field of metadata or coding information, which can be saved as widgets to see at a glance where different types of information intersect. Simply click into the widgets to drill into your data even further.

An interactive interface takes the complexity out of building complex searches, letting you quickly add criteria and drag and drop conditions into logic groups.

In total, Relativity 9.3 has 115 new features, including:

- Greater performance and productivity in Processing, including support for E01 files, as well as the ability to process and extract text with mixed use of Chinese, Japanese, and Korean languages simultaneously
- Tighter integration between Relativity Processing and Data Grid, helping you start review sooner than ever, even for the largest cases
- The ability to store billions of documents per case in Data Grid, Relativity's NoSQL data store, as well as immediate search capabilities while data is loading—so you don't need to build or maintain indexes behind the scenes

https://www.kcura.com/

TEMIS launches new semantics tool

TEMIS has announced the launch of Luxid 7.1, a new release of its flagship semantic content enrichment platform and extending its ontology management features. It includes a complete design workflow for Content Recommendation Engines, and integrated workflows that simplify and accelerate end-user tasks.

Luxid 7.1 now supports the ontology design stage. Users can now create Classes and Subclasses, as well as Class attributes and Relationships directly from the Luxid Webstudio web application, enabling users to use a single tool rather than several for their entire projects. Luxid Webstudio also now includes standardized project templates that simplify the setup of recurring projects so users can get started in a matter of minutes and benefit from added-value features such as Real-time Preview and domain-specific Concept Suggestions. The Opinion Mining Skill Cartridge template, for example, automatically highlights opinions in a green-to-red continuum based on their polarity (negative or positive) and identifies the objects to which the opinions apply, so users can easily include them in their taxonomy.

Webstudio also enables users to quickly navigate between and focus on specific areas of their ontology, corpus, individual documents and extraction results. Meanwhile, complex configuration settings stay out of the way in dedicated menus. Now sporting easy access to online documentation from any point in the application, as well as an internationalized interface, it further supports multinational deployments and multilingual projects.

http://www.temis.com

ECM Data Integrity and Transparency

By Xiaopeng He

BIG DATA has been a public topic for quite some time now. However, data integrity and transparency are rarely touched. If your organization runs an ECM (Enterprise Content Management) application, or your organization is involved in the manufacture, integration, customization and services of ECM products and solutions, you should be aware of potential data integrity and data transparency issues that are revealed in this article.

ECM manages a mixture of structured and unstructured data. ECM system places the data in storage commonly referred to as data repository. Every ECM system has at least one data repository at the backend. A chunk of data is not randomly placed in the repository. It might have relationships with or be dependent upon other chunks of data in the same repository. Or more likely, a chunk of data depends on a program or a component of the system to make it useful and meaningful to the users of the system. Users here refer to human users as well as client computer programs of the system.

Data integrity issue may arise if the internal relationships among the data are broken, or a chunk of data is no longer compatible with a program or component of the ECM system that supposed to present the data to the users of the system. When data integrity is breached, users of the system will experience data loss and sometimes more severely data security issues.

Another potential issue to an ECM repository is the data transparency. An ECM system is comprised of many sub-systems and components each may generate/consume data to/from the repository. If a chunk of data generated in the repository by a component cannot be consumed from other components of the system, there arise a data transparency issue.

For example, if a component of an ECM system generating data in the repository that is proprietary in the data format that the search component cannot comprehend, that chunk of data is not transparent to the search component and thus the search component is not able to look into that chunk of data for search hits. Data transparency issue in ECM systems prevents annotation data from serving as the first class document indexes, fine grained indexes that are able to point to a specific area in a specific page of a document.

When and how these potential issues might become reality?

Migration from one ECM system to another is surely one scenario for the manifestation of the data integrity issue especially when the source ECM system and the target ECM system are from two difference vendors. There are many commercial ECM systems available in the market and deployed in organizations today, IBM, EMC, Alfresco, Oracle and HP just to name a few ECM vendors each provides one or more ECM systems. When an organization considering migrating from one ECM system to another, the application data generated by the old system might be at risk. Unless you don't care about the data in the old system, a data migration plan must be orchestrated and implemented prior the transition. However data might be smoothly moved from the old system to the new one, still data integrity in the new system can be broken if the application data generated from a component in the old system is not compatible with the counterpart component in the new system. The counterpart component in the new system is not able to consume the data migrated from the old system due to the incompatibility between the two components. A typical example of such application data is the annotation/redaction data generated from the document viewer that works as a component of the ECM systems. If Viewer A is used in the old system and Viewer B is used in the new system, and the two viewers are not compatible with each other on annotation data formats, then no matter how smooth the data migration from the old system to the new, annotation/redaction data generated from Viewer A is not consumable from Viewer B, thus from the end users perspective, annotation/redaction data is all lost after the system migration.

Although Viewer B in the new system can display documents migrated from the old system, annotations/redactions that are associated with the documents will not show up in Viewer B as end users viewing the documents in the new system. If the lost data are redactions that are supposed to cover some sensitive information in areas of the document content, in the new system those sensitive information is wide open to every end user who can display the document from Viewer B, a serious security breach scenario to the organization. To avoid annotation/redaction data loss, vendors came up with solutions such that permanently burn annotations/redactions into the documents before move them into the new system. Obviously, this is not a good solution because it solves a problem by generating a new one. Annotations/redactions are originally separate objects in the repository from the documents that they are associated with, after the migration they are permanently burnt onto the documents. Types of documents are transformed into images. Text annotations become not text searchable in the new system. And furthermore, sensitive information on the documents that are originally covered by redaction objects is forever lost after the migration, physically this time.

Another scenario for the manifestation of the data integrity issue is when organizations switching components from one to another within an ECM system. Componentization for large software systems is the trend. An ECM system comes with many components. As the deepening of standardization and specialization in the software industry, some ECM systems allow switching and even plug-and-play of some components. One of such components is document viewer. Modern ECM systems all support multiple document viewers integrated with them. Some of the ECM vendors even provide guidelines and APIs for 3rd party viewer vendors to integrate their viewers into the target ECM systems.

The potential issue for switching document viewers is the risk of losing annotation/redaction data generated by the old viewer. In this scenario, legacy annotation/redaction data is still stored in the repository, however the new viewer, due to data incompatibility cannot read the legacy data, thus from end users perspective all existing annotations/redactions are lost when the documents that they are associated with get displayed in the new viewer. Data integrity of the application data is broken after the switching of document viewers.

Fearing the side effects of annotations/redactions, some ECM vendors went to the extreme that restrict document viewers from generating annotations/redactions, effectively making document viewers a read-only tool. This approach is a significant drawback for modern document viewers. This approach not only disables the content level document indexing, but also throws away content level collaborations among different users.

Wouldn't it be nice for everyone that annotation/redaction features can be fully utilized from ECM systems, and data integrity/transparency issues are resolved, and document viewer integrations in ECM systems are made such that deployment of document viewers becomes as easy as plug-and-play?

3Si products are designed and developed with this question in mind!

Xiaopeng He is founder & CEO at 3S International, a Aashington based independent consulting firm specialising in ECM solutions and viewer integrations

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

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Legend

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The Document Centre

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PEOPLE & INDUSTRY

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.

Contact Tel: 1300 885 989 Email: corporatesales@brother.com.au Web: http://corpsolutions.brother.com.au/

Empired, the Microsoft systems integrator with 926 employees across Australia, New Zealand and the US, will resell **Colligo**'s mobile content management solutions for Microsoft SharePoint, Office 365 and OneDrive for Business.

Empired General Manager – Business & Productivity Solutions, Mike Morgan said, "We have a history with Colligo. We have a number of client success stories in Australia and as part of our broader solutions we have implemented Colligo into some of the largest government agencies in New Zealand."

"Our teams are impressed with the evolution of Colligo Engage and the variety of email management, mobility and collaboration solutions the company is building on the platform. There is definitely strong demand for Colligo products and we look forward to a long partnership with Colligo."

Empired is one of the largest Microsoft systems integrators in Asia Pacific with skills across collaboration, social, systems management, information management, BI, CRM, ERP and Cloud.

"We're committed to ensuring Empired is successful in delivering the solutions that will help their customers gain greater user adoption of SharePoint and Office 365," says Paula Catoira, Global Partner Channel Manager at Colligo.

Canon Australia has acquired The New Zealand Post Group's managed services and business process outsourcing company, **Converga**, for an undisclosed sum. Converga specialises in business process outsourcing with a focus on digital document solutions. The acquisition of Converga is Canon's fourth in four years having previously acquired Harbour IT, Sun Studios and Océ Australia.

Canon says Converga will remain a standalone business, with the same management team and structure and retaining its independence and management autonomy.

Converga has over 1,300 staff based in offices and technology centres throughout Australia, New Zealand, United States and the Philippines in more than 120 customer locations.

A report on Business Process Outsourcing in Australia published by industry analysts IBISWorld in February concluded that while the industry grew rapidly during the early 2000s, over the past five years it has approached its mature phase, with a number of BPO services experiencing increasing levels of competition.

Paul Bellette, Chief Executive Officer, Converga says, "We're excited to be joining the Canon family. This is the right direction for our business and customers as we continue towards our goal of being a partner of choice."

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