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April-May 2017

Executive Edge

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Lexmark leaps out of enterprise software

The quest by printer giant Lexmark to build an empire in the unstructured data world has officially ended, with the news it is offloading the impressive portfolio of capture and ECM software firms it had acquired since 2010. US private investment firm Thoma Bravo, owner of Hyland Software, has purchased the full suite of solutions including the Perceptive Software business, Kofax and ReadSoft.

Perceptive Software will be placed under the Hyland umbrella, while Kofax will be established again as a separate entity and absorb the ReadSoft business. Both Hyland and Lexmark engaged in a bidding war for ReadSoft back in 2014 — a war that Hyland eventually lost.

The Perceptive portfolio assets acquired by Hyland include Perceptive Content (formerly ImageNow), Perceptive Capture (formerly Brainware), Acuo VNA, PACSGEAR, Claron, Noli, Saperion, Pallas Athena, ISYS and Twistage. As Thoma Bravo and Lexmark owners (Apex Technology Co Ltd, PAG Asia Capital and Legend Capital Management Co, LTD,) are private entities, the amount paid for the businesses was not released.

Lexmark's Enterprise Software business lost \$US88 million in 2015, according to Lexmark's 2015 annual report (Lexmark, which is best known for its printers, went private in November 2016). It generated \$US534 million in revenue that year, up from \$US224 million in 2013 (it lost nearly \$US80 million in 2013).

The revenue increase was largely driven by two acquisitions: Lexmark bought Kofax in 2015, and it acquired ReadSoft in 2014. Following those acquisitions, the Enterprise Software group went into cost-cutting mode, according to documents filed with the U.S. Securities and Exchange Commission.

"We're incredibly excited to be acquiring the Lexmark Enterprise Software business as it contains some of the most advanced digital transformation technologies in the industry. The Perceptive Software business is highly complementary to Hyland, providing innovative technologies and vertical expertise," said Seth Boro, a Managing Partner at Thoma Bravo.

"We're equally thrilled to partner with Reynolds and his management team under the Kofax brand as a new Thoma Bravo portfolio company. Their vision to digitally transform and simplify initial customer interactions with businesses, or what they term the 'First Mile,' represents an exciting opportunity across all industries."

Kodak Alaris unveils Information Capture "Ecosystem"

Kodak Alaris has announced a series of scanner, software, and service enhancements featured in the Alaris IN2 Ecosystem. Specifically, Kodak Capture Pro and Info Input Express Software, when combined with Alaris scanners, offer new, intelligent capabilities including:

- **Intelligent Exception Processing** - ensures immediate validation of forms so any missed information at the point of transaction is identified and fixed, resulting in better customer interactions and greater potential to drive revenue.
- **Intelligent Barcode Reading** - produces the most accurate data extraction results and takes complexity out of the setup process.
- **Intelligent Job Select** - takes advantage of specific patch code separator sheets to automate job switching and profiles. This enhances productivity by minimising downtime between jobs, and is available immediately on the i5000 Series scanners and the rest of the product line later this year.

The Info Input Solution portfolio also introduces an HTML5 Client solution in addition to the current Java Script option. On the Services side, the Alaris IN2 Ecosystem will offer individually configurable repair and maintenance, as well as providing professional services like configuration, training and consultation.

For hardware, the Kodak i4000 Series Scanners now offer the addition of metal detection, extending this capability from the top of the line i5000 Series. Detecting and preventing metal such as staples or paper clips from entering the scanner reduces downtime and avoids damage to the scanner and documents.

The inability to efficiently capture information from paper-based documents and integrate with digital workflows leads to complexity and lost opportunity across organisations.

"Within this challenge lies a massive opportunity to drive growth and efficiency," said Rick Costanzo, President and General Manager, Kodak Alaris Information Management.

"Companies that master digital transformation are far better positioned to differentiate themselves from competitors and win in the marketplace."

Contact: francis.yanga@kodakalaris.com (03) 8417 8132

ELO teams up with Info Proficiency

One of Australia's most experienced Information Management specialist organisations, Information Proficiency (part of the Proficiency Group Pty Ltd), has formally joined ELO's certified business partner network.

"Information Proficiency's reputation for excellence and efficiency precedes them" said Rainer Krause, Managing Director of ELO Australia & New Zealand. "Needless to say that I jumped at the opportunity to set up a formal business partner relationship".

The partnership with Information Proficiency gives ELO access to an expanded capability. Following the completion of ELO certification training Information Proficiency is now certified to provide installation and professional consultancy services.

"We're excited at the opportunity of being able to offer ELO to new customers looking for a powerful EDRMS at an affordable price" said Dennis Strydom, Information Proficiency's General Manager of Business Development.

"Organisations across Australia, especially SME's are in desperate need of a quality information management tools. Our technical team rigorously tested ELO with a specific customer profile in mind and concluded that ELO enables customers to access important management and productivity features and realise the benefits of an IM tool at a low cost entry point" www.elodigital.com.au, www.infoproficiency.com.au



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Published by:

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Melbourne University pilots blockchain for student records

The University of Melbourne is to join forces with Learning Machine, a US-based company associated with the Massachusetts Institute of Technology (MIT) Media Lab, to pilot a blockchain based micro-credentialing system. It will enable employers to verify those credentials quickly. The University will be among a select group of universities worldwide - and the first Australian institution - to trial this technology.

Pro Vice-Chancellor (Teaching and Learning) Professor Gregor Kennedy said the system will be trialled in an internal professional development program run in July by the Melbourne Centre for the Study of Higher Education with a wider roll-out being considered for 2018. Professor Kennedy said the decision to pilot Learning Machine's blockchain platform for micro-credentialing is based on supporting new types of learning recognition that are increasingly being demanded by students and employers in a globalised, digital world.

"In a future where career 'churn' and constant technical and organisational innovation are the norm, employers are looking for ways to verify the know-how and skills of employees at a very granular level," Professor Kennedy said.

"Similarly, students are increasingly interested in showing the specific skills and abilities they have acquired and developed. Micro-credentials, verified through secure, distributed platforms like Learning Machine's are a means to address this."

Learning Machine's Dr Natalie Smolenski said the underlying blockchain technology gives individuals complete control and "sovereignty" over how their achievements are represented and to whom. It also stores their credentials in an incorruptible and digitally secure system.

"Anyone who needs to verify official records, such as employers, can quickly check the validity and authenticity of each certificate. Any attempt to change, embellish, or otherwise misrepresent a micro-credential represented by a certificate will cause the verification to fail."

Australian government tests e-invoices

Australian technology company, MessageXchange has announced the successful demonstration of end-to-end transaction between the Australian Government and a private sector recipient using a new Australian e-invoicing standard.

The Australian Government's Department of Industry, Innovation and Science used MessageXchange, an Australian-developed cloud service, to securely deliver a test e-invoice to a grant recipient. The e-invoice is claimed to be the first of its kind to be sent by an Australian Government department.

The Department of Industry, Innovation and Science's Chief Operating Officer, Michael Schwager said "e-invoicing will deliver benefits to our suppliers, including grant recipients, but it will also allow the department to streamline its internal accounts payable processes. These in turn will generate efficiencies and improve the timeliness of payments to suppliers."

The new Australian e-invoicing standard has been created through a collaboration between Government and Industry, led by the Digital Business Council. The Council was founded in 2015 to develop, deploy and facilitate the adoption of digital standards in Australia. It has been estimated that widespread adoption of e-invoicing could save Australian businesses between \$A7 billion and \$A10 billion each year. Members of the Council include the Australian Taxation Office, Australian Government Department of Finance, NSW Government Department Finance, and the Australian Local Government Association (ALGA). Other members include industry bodies such as the Australian Business Software Industry Association (ABSIA), the Australian Information Industry Association (AIIA), Chartered Accounts (CA ANZ), and the Chartered Institute of Procurement and Supply (CIPS).

Peter Strong, CEO Council of Small Business Australia and Chair Digital Business Council commented, "e-invoicing is a transforma-

tional step in Australia's digital business movement to a streamlined, integrated and productive economy, and is an exciting step forward especially for the small business community. The Council is especially pleased to see Government at the forefront of digital transformation."

John Delaney, co-founder and Managing Director of Australian-developed cloud integration service MessageXchange explained, "e-invoicing offers significant processing and payment time efficiencies over scanned or emailed invoices. Many of Australia's largest and most efficient supply chains already use MessageXchange, which currently processes more than 100 million transactions a year."

"We have demonstrated that both our MessageXchange and Colladium cloud services are ready to securely handle e-invoices using the new Australian standard. Most importantly, we have demonstrated that both Government agencies and Industry will be able to very inexpensively and rapidly reap the benefits of e-invoicing."

Until recently in Australia, e-invoicing and Electronic Data Interchange (EDI) technologies have been predominantly used in the supply chains of large businesses, with varying standards presenting barriers for small businesses. Industry standardisation of e-invoicing is likely to increase adoption, while also reducing costs and complexity for all. The collaboration between the private sector and the Australian Government achieved through the Council has led to the establishment of regulation, industry standardisation and mechanisms that instil trust in the e-invoicing framework. The new framework is designed to reduce barriers to entry and provide a level playing field for all Australian businesses that wish to adopt e-invoicing.

www.messageexchange.com

A/NZ CIOs punch above their weight in Digital Transformation: Gartner

CIOs in Australia and New Zealand (ANZ) place a higher priority on customer focus and digitalisation than their global peers, with more investing in digital initiatives and fewer in core systems such as ERP, according to Gartner, Inc.'s annual CIO survey. The survey data shows that ANZ CIOs are intensifying their efforts to strengthen digital leadership, organisation and technology capabilities this year.

The 2017 Gartner CIO Agenda Survey gathered data from 2,598 CIO respondents in 93 countries and all major industries, representing approximately US\$9.4 trillion in revenue/public-sector budgets and US\$292 billion in IT spending. 173 CIO respondents were from ANZ.

The survey data shows that 49 percent of ANZ CIOs are participating in digital ecosystems as platforms to exchange information and interact electronically with competitors, customers, regulators, stakeholders and other enterprises.

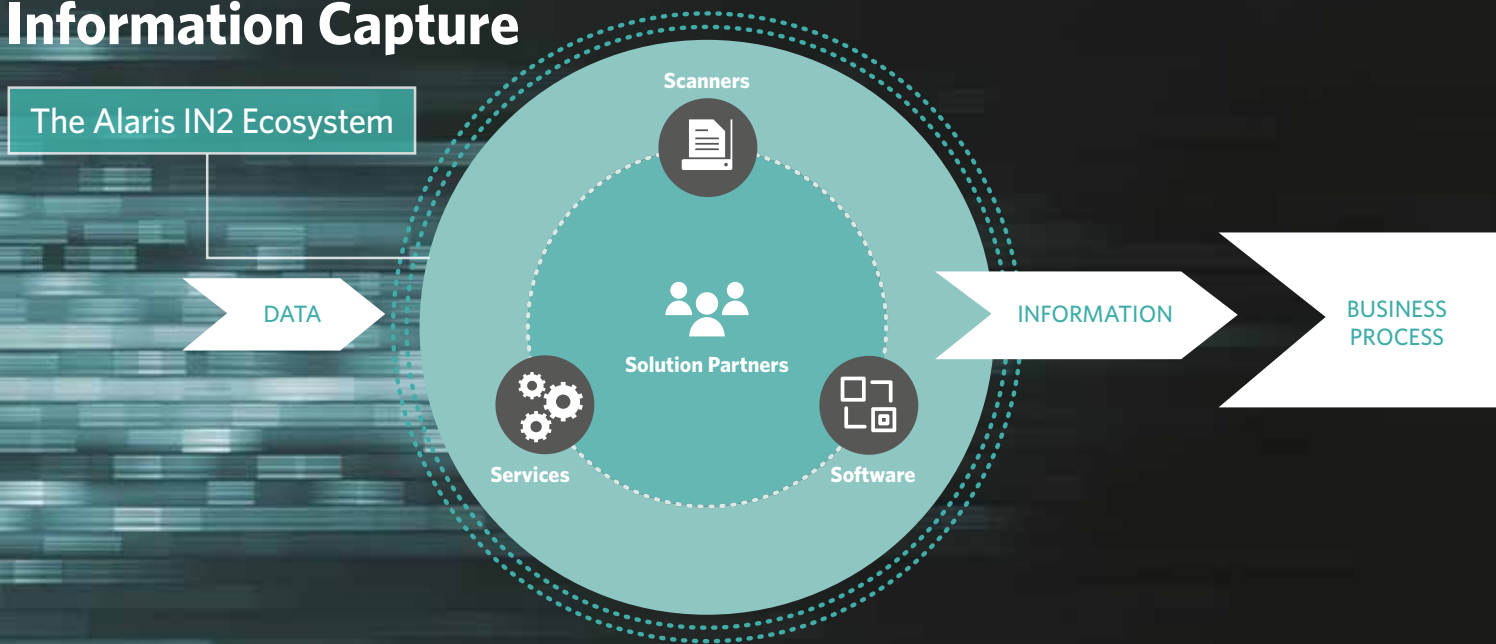
According to the survey findings, ANZ CIOs expect lower IT budget growth in 2017 (2 percent) than last year (2.9 percent), which is also behind the 2017 global average of 2.2 percent. In Asia Pacific, the average increase expected is 4.3 percent, skewed by CIOs in both China and India reporting over 10 percent average increases in their IT budgets this year. CIOs globally are reporting that they expect to spend more on digitalisation in 2017, with ANZ CIOs ahead of the overall average on investment and focus. ANZ CIOs exceed global peers in their expectation of digital spend from the IT budget this year, as well as in their projections for 2018.

ANZ CIOs cite a lack of skills and resources as their biggest barrier to achieving their objectives as a CIO. They identified the biggest talent gaps as information, analytics, data scientist and business intelligence skills, along with their global peers. However, in ANZ the next biggest gap is digital business/digital marketing skills, while CIOs globally cited security. The top areas of new technology investments clearly show that significant spending and opportunity continues in big data and analytics, and that cloud continues to have significant momentum. Digital investment is more popular among ANZ CIOs (28 percent) than global peers (16 percent). Proportionally fewer ANZ CIOs are reporting core or ERP systems to be a top technology area than their global peers.

Alaris IN2 Ecosystem

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Alaris IN2 Ecosystem - A Winning Portfolio

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Corrs patents legal search technology



Australian law firm, Corrs Chambers Westgarth, has received a patent from IP Australia for a new optical character recognition (OCR) analysis technology.

The technology identifies documents with low quality searchable text and will be used as part of a new service being launched by Corrs called JustOCR.

JustOCR is a cloud-based OCR service that is claimed to be 50% faster than standard in-house OCR processing and 50% cheaper than existing OCR outsourcing options, in addition to offering the newly patented analysis technology at no additional cost.

Standard OCR tools convert images of text into machine-encoded, searchable text. Just OCR performs this same function using cloud resources to significantly reduce time and cost. The firm says JustOCR's real innovation, however, is in the service it includes at no extra cost - OCR analysis - which provides a quality score for each document to help users identify where the black spots in their document collections are.

"We are committed to helping our clients see around corners, and this is exactly what JustOCR does. OCR technology was a huge leap forward for the legal industry, particularly in litigation cases. Our new OCR analysis feature is the next step up, providing users with a significant strategic advantage in ascertaining where the gaps are in their own and other parties' document collections," said Corrs Partner James Whittaker.

Corrs Head of Innovation Graeme Grovum added: "It is also a much more efficient option for users. Existing OCR services typically require a choice of speed versus cost. It can usually take a week or more to recognise 1.5 million pages and cost clients anywhere between 2 to 4 cents per page. While that might not seem like much, the cost of outsourced OCR is prohibitive for large matters with millions of pages. JustOCR is able to OCR and analyse 1.5 million documents in just a few hours and at about half the price of the industry's lowest rates."

JustOCR was developed by Corrs' innovation and development team and will be available to the open market in Australia and internationally, as well as to Corrs clients. It is one of a number of recent innovations launched by the firm, including its recent launch of Beagle Asia Pacific, a joint venture providing companies with practical and accessible artificial intelligence technology, and CAEL Verify, a collaborative project with Elevate Services to streamline the process of verifying document statements prior to market release.

"Our pioneering mindset ensures that as a firm we are constantly assessing the current norms and exploring whether there are better, more efficient solutions out there. We are committed to open innovation and that means bringing to market our advancements to benefit not just our clients, but the legal profession more broadly," James Whittaker concluded.

JustOCR is currently in closed beta, with Corrs soon to be accepting applications to trial the product from existing clients and non-clients alike.

EzeScan into the cloud with TechOne

EzeScan has been providing TechnologyOne Financials users with Invoice Processing solutions for the on-premise version of Financials for over five years.

The company has now assured users of the cloud version of TechnologyOne Financials that they can use the EzeScan Invoice Capture solution for AP officers to validate and upload invoice document files into the TechnologyOne cloud environment as an out of the box solution.

In 2016, TechnologyOne reported another record year for its cloud business, recording more than 100 per cent year-on-year growth.

The growth followed the enterprise Software as a Service (SaaS) provider's introduction of its sixth generation TechnologyOne Cloud, which establishes software mass production and a high level of automation.

"SaaS finally introduces the concept of mass production to the software industry. Much like mass production signalled the demise of the cottage industry in manufacturing, true SaaS solutions will replace the role of cloud hosting providers," said TechnologyOne's Executive Chairman Adrian Di Marco.

"That is why, rather than 'lifting and shifting' to the cloud like hosting providers, we've gone down the path of integrated mass production through SaaS. We are proud to be one of the only enterprise software providers that offer a fully-integrated and configurable enterprise SaaS offering.

"Our enterprise SaaS solution provides a compelling value proposition to our customers, giving them what is essentially a very simple, cost effective and highly scalable model of computing. We take complete responsibility to provide the processing power, software and services including backup, recovery, upgrade and support services for our cloud customers."

(After 30 years as one of Australia's longest serving CEOs, TechnologyOne founder, Adrian Di Marco, recently handed over the reigns to the Australian software firm's COO, Edward Chung.)

US hospitals struggling with EHR interoperability

As nearly every US hospital has an electronic health record system, 41% of surveyed medical record administrators still report struggling with exchanging patient health records with other healthcare providers, particularly physicians not on the same EHR platform. 25% say they are still unable to use any patient information received electronically from external sources. 81% of network physicians look to their core health system EHRs to enable interoperability among integrated healthcare delivery providers in order to set the stage for data-intensive initiatives such as population health, precision medicine, and value-based payment models.

"As inpatient organisations implement optimised EHR software that uses FHIR to advance interoperability and HIE, the entire provider network gains the data exchanging functionality to better serve patients," said Doug Brown, Managing Partner of Black Book Research.

"Physician groups continue to lack the financial and technical expertise to adopt complex EHRs which are compulsory to attain higher reimbursements by public and private payers."

70% of hospitals aren't using patient information outside their EHR in Q1 2017 according to surveyed clinicians because the external providers' data is simply not available in their EHR systems' workflow.

22% of medical record administrators report the transferred patient information was simply not presented in a useful format. 21% of hospital-based physicians polled in January 2017 state the data they view cannot be trusted for accuracy when sent between disparate systems.

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“45% of organisations agree that the lack of information governance leaves their organisation wide open to litigation and data protection risks. - AIIIM, March 2017

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BCE takes the pain and paper-handling out of payroll processing

The headaches of handling paper forms and records can quickly add up when managing payroll for an organisation with more than 11,500 employees. A successful backscanning and digitisation project at Brisbane Catholic Education (BCE) has removed a lot of the pain from payroll administration.

The BCE Head Office in Brisbane is responsible for a vast education network including over 139 school communities and over 72,000 students from primary to secondary. When it came time for a renovation of the head office the inordinate amount of floorspace required in storing more than 500 boxes of paper personnel records was viewed as an obstacle.

Brisbane solution provider Avantix came up with a proposal to bulk scan the records into BCE's SharePoint repository. This included optical character recognition (OCR) to allow for indexing and instant search.

BCE's SharePoint environment is the second largest in the southern hemisphere and provides an intranet for more than 250,000 users including, staff and students.

The wide range of documentation required by the payroll department such as leave requests, contracts of employment, certifications, allowances, etc. would typically arrive in paper form for manual processing into BCE's payroll application, Ascender Pay.

As a state educational institution, it is required to retain such records for varying periods ranging from 7 years from date of last action to 85 years from date of birth.

BCE's SharePoint deployment provided the ability for individual records to be scanned and uploaded, with a template form to allow relevant metadata to be added individually. However, there was no ability to undertake bulk ingestion of thousands of individual files.

Avantix CEO Duncan Lord, said, "We were able to come up with a compelling solution for BCE utilising the PSIGEN PSICapture capture platform."

"This required us to work closely with the business unit, records management and IT to ensure a successful implementation."

To complete the backscanning project, Avantix provided bureau services accomplished with two OPEX Falcon mixed document capture workstations.

The project needed scanners that could handle mixed-media as well as capture.

Falcon is a one-touch document scanning workstation that allows operators to scan a broad range of document sizes and formats with minimal labour, which makes it easy to prepare the documents for imaging. Each page is evaluated for image quality, correct order, and orientation as the documents are processed.

As part of the scanning workflow, a data extract was received from BCE's payroll system to validate and populate employee numbers, first names and surnames to ensure uniformity across their software systems.

"Many of the individual employee files had grown over tens of years when different policies and records management procedures were followed, so content within records often held surprises," said Lord.

"By configuring direct connectivity from OPEX to PSICapture and PSICapture to BCE's SharePoint libraries environment it gave us end to end automation and created efficiencies which would not have been otherwise possible. Using PSICapture not only was the upload of the data and documents automated and seamless we were able to dynamically create folders and metadata columns for each employee record and use BCE's Folder and document content types that were already available in BCE's SharePoint environment.



"With end to end automation being a key component of meeting the deliverables, the connectivity between OPEX and PSI capture was very important to us.

"From scan - data capture - QC and exception handling - ingestion into SharePoint was automated in a single workflow platform for maximum efficiency and consistency across large volumes of images and data."

As these were live personnel records, overall project timeframe and accessibility to records during to project was critical. For emergency retrievals during the backscanning project, individual employee files were able to be located and uploaded to SharePoint within 2 hours.

"The project went very smoothly and provided a great result for BCE. They now have secure digital records that are searchable," said Lord.

After the backscanning project was completed in January 2017, a complete catalogue of the contents of the 500+ boxes of historical records was supplied to be barcoded and linked to BCE's long term storage suppliers retrieval system.

Each employee's historic record is stored as a single multi-page PDF/A file in their individual folder in SharePoint.

The payroll office has now implemented day forward scanning of new records utilising a Kodak alaris i4200 scanner and Kodak Capture Pro software.

Is RPA a Magic Pill ?

By Shashank Singh

A couple of weeks back, I was interacting with few operations executives from health insurance, auto insurance and specialty insurance companies. It was a nice cozy evening and the discussion topic was the new buzzword in town “Robotic Process Automation” aka RPA. People have different names to it also – Intelligent Automation, Bot Automation and probably few less known ones.

The general perception was that it's a magic pill – some godly programmed software which can eradicate all the pain problems of the operations floor – mundane repetitive tasks, boring processes, cross-department bottlenecks, longer turnaround time, high operations cost. After chewing this magic pill, all will look extremely good from the KPI perspective.

Before we jump to assess whether it's a magic pill or not; let's understand what is RPA?

One definition says “RPA is a sophisticated compilation of software programs which are intelligently written to capture and interpret existing applications for processing a transaction, manipulating data and triggering responses.”

I think, it's drawing too long a bow to compare RPA with Robotics as there is limited resemblance with no artificial intelligence (AI), neural networks or deep learning capabilities embedded. A better descriptor would be Intelligent Process Automation (IPA) or Sophisticated Macros (SM) as the set of programs that intelligently mimic human interaction (not behaviour) for managing a specific process and runs in a controlled environment for best results.

A few years back, there was similar excitement about Business Process Management (BPM) tools promising better ROI on operational dollars invested, but these had their own limitations. In today's world, RPA tools are much leaner, meaner, intelligent and optimally priced to give next level of process automation.

It's not well-understood that to take the RPA ride, you must meet specific minimum requirements – a basic rule of thumb is to focus on repetitive tasks where programs can be configured to mimic. This can safely cover processes around finance ops, procurement, customer on-boarding, operations, supply chain management, accounting, customer service, infrastructure monitoring, and much more.

Is it a Magic Pill? The simple answer is NO.

This is not a magic pill where software will be installed for the operations floor and all the amber/red lights will turn green and

management dashboard starts to look great. This is a journey.

Let me iterate by giving example in the Insurance industry. Insurers face multiple challenges – namely, manual data entry from multiple data sources, inter-department process handshakes are fairly manual, back-end legacy platforms and ever-increasing need for tighter regulations. Insurers play a balancing act of moving their investments into the digital journey (customer experience), compliance with regulatory frameworks and persistence management. In this scenario, process automation may not be a top priority.

The reason I describe it as a journey is because it is the RPA tool may help to automate repetitive long-drawn processes, but in parallel, processes must be optimised to achieve better RPA results. The RPA tool will not optimise the process – it just automates. If certain process takes few hours manually, RPA tool can bring down to minutes, but it will not streamline the process or process dependency.

Within the Insurance operations realm, RPA is classic fit around customer on-boarding (new business), where tons of data entry happens, proposal tagging, OCR checks, policy service (address update, etc.), letter generation, claims assessment, claims processing, complaints tagging, automated email response and operations reporting,

In conclusion, RPA may not be a magic pill but it definitely offers a welcome change to the arduous and manual operations department. For a soft-landing it is essential to have a pre-RPA stage, where individual and inter-linked processes are reviewed in detail and are optimised to remove insufficient grids, sub-processes or tasks or data points. For example, if a certain operation report has 20 data elements which are pulled from 5 different data sources, can the report be further optimised (Minimal Viable Outcome) so that it has 10 data elements pulled from 2 different sources. This way, when the RPA program is configured to pull the data – it's giving optimised result in a shorter time frame.

Executives should be aware that process automation requires process optimisation, both are two great ingredients of a magic pill. The overall objective can't be achieved if we don't use both the ingredients. We have to do our bit before software can do it's own.

Shashank Singh is a Singapore-based Digital Consultant specialising in Technology and Transformation Management.



ANZ improves security with Nuance voice biometrics



ANZ has announced it will be the first Australian bank to introduce voice biometrics to improve security on mobile devices to allow higher value transactions.

From the middle of this year, customers transferring more than \$1000 through ANZ's mobile apps will be able to use their voice to automatically authorise high value payments.

Previously customers needed to use internet banking or visit a branch to complete transactions more than \$1000.

Managing Director Customer Experience and Digital Channels, Peter Dalton said: "One of the key challenges today for banking as the world becomes more digital is making it easier for customers to do what they want to do in a safe and secure way.

"Voice biometrics is the next step in making banking more convenient for our customers while also strengthening security.

"A person's voice has five to ten times as many security points than other methods such as fingerprints so we know this will improve security and be welcomed by our customers. The technology is now so advanced that it can tell the difference between identical twins or even a voice recording.

"We also know that people are becoming more comfortable with using their voice to do basic commands on their devices, so we see this is a natural extension of current technology and we are expecting this to be a popular enhancement of our mobile apps," Mr Dalton said.

ANZ has been working closely with world-leading voiceprint and biometrics company Nuance to bring this new technology to Australian customers. A pilot will begin with ANZ staff and select customers in May using the Grow by ANZ mobile app. The service will then be rolled out to ANZ goMoney and other digital services progressively.

NAA sets standard for government IM

The National Archives of Australia has launched a new Australian Government standard to help manage the government's growing business information.

The new Information Management Standard outlines principles to help agencies meet business, government and community needs in relation to how information is managed across the sector.

The National Archives will review how agencies are performing against the Standard as part of its regular survey and evaluation of the Australian Government information management environment

'Recent government inquiries including into the Home Insulation Program and Institutional Responses to Child Sexual Abuse have highlighted the need to keep evidence of government decisions and interactions, and the importance of

this personal information to the individuals involved,' Mr Fricker said.

'The Information Management Standard sets a firm foundation for agencies so they can plan for, conduct and monitor their information management practices. The standard also provides a basis for agencies and the Archives to review their performance.'

The National Archives' expectations for creation and management of Australian Government business information are clarified in the standard and embrace the opportunities offered by an increasingly digital government environment.

'Information can be created anywhere, anytime and through a variety of means including social media and email,' Mr Fricker said.

'With that in mind this standard outlines the need for business information to be created, kept and managed appropriately, and to ensure key government deliberations and decisions are documented to support robust advice, sound business process and open and accountable government.'

The standard is consistent with the International Standard ISO 15489 (2016) on Records Management and offers a practical approach to maximising the business benefits of well-managed information in the Australian Government. It applies to both digital and analogue information and aligns with the National Archives' Digital Continuity 2020 Policy.

'Some digital information created today will be of national significance and preserved as part of the National Archives' collection. In issuing this standard, the Archives is ensuring that valuable business information is created and can be preserved and made available into the future for the benefit of all Australians,' Mr Fricker said.

<http://www.naa.gov.au/information-management/information-management-standard/index.aspx>

Pacesetter Services & Information Proficiency Team up for Local Govt

Pacesetter Services has partnered with solution provider Information Proficiency to offer a range of services and solutions for Local Government. Pacesetter Services are experts in the Authority Enterprise Suite and Information Proficiency are specialists in Information Management and EDRMS.

Richard Love, Managing Director of Pacesetter Services declares "We know from experience that it is quite common for councils to have problems with integration and workflow between Authority and TRIM. We also know it is often a challenge to get problems resolved when having to deal with multiple providers. As a result we looked for a partner that had complimentary skills and services to address this."

Lisa Read White, Managing Director of Information Proficiency added, "Pacesetter are experts with the Authority suite and Information Proficiency has the specialist knowledge to wrap around that capability to design and implement good Information Management. We have been working with Pacesetter to upgrade systems, improve and optimise existing installations, migrate unmanaged Authority data and refine processes for Local Governments across Australia."

The Pacesetter and IP team will offer services including: Implementing and Optimising HPE TRIM, Records Manager, Content Manager, Control Point and other products.; HPE TRIM and RM upgrade; •Extension solutions such as picture add-ins, document templates, and more; Corporate System Integration & MS SharePoint Integration

Contact details for both organisations are:

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Records Management on SharePoint: The Questions You Should Ask!

By Noel Williams

I think by now there is a good level of awareness that Microsoft SharePoint has records management functionality, but the general view that I often hear expressed is that this SharePoint RM capability is light-weight compared to traditional RM solutions.

My own view is that SharePoint's RM capability can be a good answer for the real needs of many organisations, especially when SharePoint is front-ended by a tool that provides an improved user experience – like MacroView DMF. The problem is that people are asking the wrong questions!

Here's an example of such a question: "Is SharePoint RM certified to comply with Standard XYZ?". That's a question that must be asked and answered positively in some highly regulated industries and market sectors. But for most organisations the questions that should be asked about any electronic records management solution are:

- A. Is the Records Store going to contain all the relevant documents and emails?
- B. Will those recorded documents and emails be retained and protected from alteration for the appropriate period?
- C. Will it be easy to find a recorded document or email should the need arise?

Let's see how by combining SharePoint with MacroView DMF you can create an electronic records management solution that does provide good answers to these key questions.

Do You Need a Records Center to Have Records in SharePoint?

Firstly, we need to clear up a commonly held misconception about SharePoint records management solutions – which is that you need to use a Records Center.

In a Records Center, metadata attributes are recorded in such a way that every document in the Center can potentially have a different set of metadata columns. That makes a Records Center a handy repository for documents and emails that need to be retained after the document libraries in which they were originally saved no longer exist – typically because the library was created to support an operational activity – e.g. a transaction, a project or a matter – that is now completed.

But you do not have to have a Records Center to have records – you can have records declared in place within document libraries. What if those operational document libraries are not deleted after the operation is completed, but retained until all their in-place records have reached their expiration dates? In that case we can answer YES to Key Question B, above.

This approach has the advantage of reduced effort – there is no need to move the records to a Records Center, because they can remain where they were saved during the operational phase.

Is the Records Store Going to Contain All Relevant Documents and Emails?

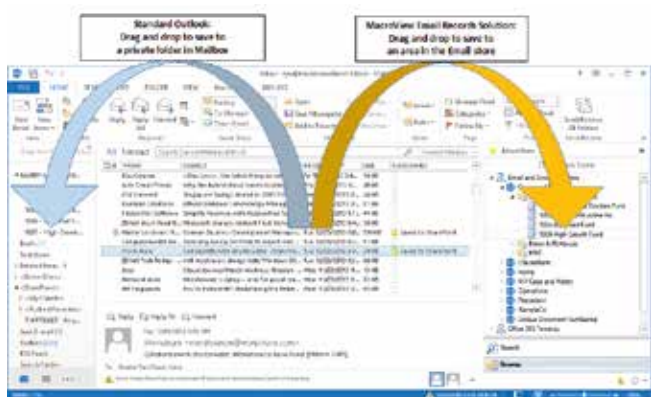
Another way of asking how to ensure user adoption, which is a significant issue for any electronic Records Management solution. Unless the users go to the trouble of declaring each and every relevant document and email, the records store will not be complete.

How to know which documents and emails will ultimately be relevant? Will at least one of the recipients of a vital email declare that email as a record?

My view is that the best way to handle this is to make it so easy to save documents and emails that users are happy to save all but their personal documents and emails in the store, so that all of them can be retained as records. When later we need to



To declare a document or email in SharePoint as an in-place record you right-click it in a MacroView file list and choose the Compliance option. Declared records in a file list are highlighted in a user-definable colour.



To save an email and have it declared as a record, you drag and drop to the MacroView pane on the right of Outlook, rather than to the Mail Folders pane on the left.

find a particular record we rely on an effective search (see more below). This make-it-so-easy-that-everything-gets-saved-as-a-record approach removes the effort and risk associated with deciding which electronic documents are worth keeping.

How to make saving easy and attractive? That's where MacroView Message and MacroView DMF come in. These tools provide a business-user-friendly interface to a SharePoint store. They allow emails and documents to be saved by drag and drop, individually or in bulk, with maximum automatic metadata capture (e.g. no prompting for metadata as emails are saved to SharePoint).

Will recorded documents and emails be retained and protected from alteration for the appropriate period?

Based on my observations over many years, SharePoint security is effective – if you have no permission to a document, it's as if that document does not exist. Declaring a document as a record adds a further level of protection – essentially making that document read-only and removing delete permission for all users except those designated as Records Managers.

MacroView Message and MacroView DMF make declaring a document as an in-place record as easy as right-clicking it in a MacroView file list display and choosing the Compliance option. Alternatively, documents and emails can be declared as in place records automatically by a SharePoint workflow or library setting. MacroView can even highlight the declared records in a user-defined colour.

It's important to note that 'Appropriate Period' does NOT mean 'Forever'. For risk management reasons, an effective electronic records management solution should not retain records for any longer than is mandated. In this regard a useful approach is a workflow that highlights any records that have reached their expiration date, or are about to reach expiry.

Will it be easy to find a recorded document or email should the need arise?

As noted above, the general answer here is to utilise the power of the SharePoint Search engine to find records when they are needed. And the key to making those searches effective is to be able to use both content AND metadata.

MacroView Message and MacroView DMF support all the types of metadata that you can have in SharePoint and they enable extensive automatic metadata capture. In part that automatic capture is thanks to the way MacroView automatically chooses an Email content type and automatically records all the non-personal attributes of an email as metadata. But another important reason why MacroView can do so much automatic metadata capture is the way it displays a complete and accurate tree-view of the structure of a SharePoint document store – essentially MacroView enables SharePoint designs which are good for automatic metadata capture.

MacroView Message and MacroView DMF are also very business-user-friendly when it comes time to search for documents and emails in SharePoint, including those that have been declared as records. With MacroView you can search based on content AND metadata to while you work in applications that are familiar to business users – such as Outlook, Word, Excel and PowerPoint. What's more, MacroView allows you to define additional types of search which are tailored to the way groups of users in an organisation use metadata. Behind the scenes, the searches are performed by the SharePoint search engine – there is no need to define additional search indexes or to use additional search applications. In a nutshell, what MacroView is doing is provide a much more intuitive, convenient and customisable interface to the SharePoint search engine, compared to the interface that ships as part of the SharePoint web browser UI.

Noel Williams is co-Founder and Chief Executive of MacroView Business Technology. MacroView specialises in document generation and management solutions based on SharePoint and Office. <http://macroview365.com/>



Searching for records declared in a specified date range using Records Search panel in MacroView DMF. Note that this search was done across an Office 365 SharePoint Online tenancy – also support for searching across and on-premises SharePoint Server environment.

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Before you start building your new classification scheme...

By Conni Christensen

To paraphrase Patrick Lambe (yet again): Building classification schemes is at the same time deceptively simple and fiendishly complicated.

It's deceptively simple because it's one of those tasks that you can just start by putting terms into a spreadsheet, or into the SharePoint term store.

In my role as a taxonomy software developer, I watch as most classification schemes fall over after a year or so. Because it's considerably more difficult to build classification schemes that sustain over time. Those schemes that persist do so because they meet the collective needs of the organisation.

So here are some of the questions you need to ask before you start. But finding the answers may be harder than you think.

Who are the stakeholders for the classification scheme?

You can't just assume that your front-line users (those who are classifying information in your system) are the only stakeholders. Many others will have a vested interest in your scheme:

- Searchers both within and from outside your information ecosystem who want to find information
- Data analysts who want to mash your information with other databases
- Records managers who have to appraise the information for retention and disposal – if not now, then in a few years' time
- Legal and compliance managers, with oversight of risk, access and security, privacy,
- ICT who will have to migrate/archive your information into another system

You need to find them and consult with them.

Are there existing standards you should be adhering to?

All across the world, governments and industry are working toward data/metadata governance standards particularly wrt metadata formats, structure and values. Standards facilitate compliance with legislation, harmonisation across boundaries, interoperability and integration between systems, and support functionality such as enterprise search.

When you consult with other stakeholders, chances are you'll find out what standards are applicable to your classification schemes. These include standards such as ISO 15489 Records Management and ISO 23081 Recordkeeping Metadata. Plus you should consult with peak industry bodies or your government regulators.

Are there industry classification schemes you can or should be using?

Depending on your industry or jurisdiction you may be required to use approved schemes with standardised terms. You may find more information on the websites of your peak industry bodies and government regulators.

I recently witnessed a contractor building an entire suite of classification schemes for a new SharePoint library. He was building lists of commonwealth legislation and agencies from scratch as he didn't know who to contact or where to source these schemes from.

Are you sure you're not re-inventing the wheel?

Everything that you're about to do has been done before, in a different system, at a different time. Most organisations have established classification schemes – in network drives, in ECM systems, in SAP, in line of business systems. These schemes range in structure from simple lists to deep and complex file plans. Some are good, some are past their best. Many have been built at a considerable cost to the organisation by external consultants. Maybe the scheme/s you are building already exists. And just need updating!

What is the best information architecture to use?

Are you stuck in the hierarchical headspace?

Many folk still cling to the view of an all-encompassing file plan that forms the backbone of their ECM system. Originating with Windows Explorer the hierarchical approach to classification transplanted itself into ECM systems as a system for arranging "records". Given that the hierarchical approach to classification was the main game for over 20 years, it's not surprising that many folk still view classification as a hierarchical event.

But times have changed folks. Contemporary information systems provide many more options for classification. In SharePoint for example you can create a mix of classification options through team sites, sub-sites, libraries, lists, content types, folder structures, lookup sets, and managed metadata. Information architects can now tailor classification to better suit the needs of their users.

Of course, such flexibility creates its own problems.

What relationships will the classification scheme have with system processes?

Do you know which classification terms (and relationships) are used to signify or trigger system processes relating to:

- access and security
- retention and disposal
- legal holds
- data transfer
- other workflows
- migration into /integration with other systems

There's an entire logical data model that connects classification concepts with information governance policies and workflow. It may not be well expressed but it exists, sometimes in the form of records retention schedules and security classifications. If you've consulted with other stakeholders you should be getting a clearer picture of information governance requirements.

How will your classification scheme to be maintained over time?

Even if you get else everything right, your scheme is going to change over time, starting from tomorrow. How are you going to manage the process of change, who is responsible, and are they across the answers to all of the questions we have just put to you?

Conni Christensen is a founding partner of the Synercon Group, specialist in Taxonomy & Metadata for Information Governance.



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The Whys and Wherefores of Knowledge Management

By Rob Koene

Over a lengthy career, I have found Knowledge Management (KM) referred to by many different names before settling into the current usage. One thing that has remained constant is that the most important ingredient has always been the willingness to share information.

The professional use of Knowledge Management Systems depends on people and it revolves around trust.

Confucius is claimed to have said: *To know what you know and what you do not know, that is true knowledge.* (And this guy lived around 500 BC (2500+ years ago).

It is not difficult to understand why knowledge sharing is a survival factor, perhaps not immediately for the individual, but for a group/civilisation. This is something which is even observed in the animal world.

In a corporate environment, KM helps improve productivity by building trust, networks and by substantially enhancing the intellectual level of the corporation.

Knowledge = Power. OK this may work at an individual level until the knowledge gets stale, which can happen quite quickly. Often this is exposed by use of phrases such as "I have done it like this for 25 years".

Why Do Knowledge Management?

Why should a company embark on Knowledge Management? There are many good reasons but the major one – in my opinion – is to maintain the knowledge of those retiring in a way that makes sense to the next generation.

Note that it is - in this context - important to involve this next generation in how to present it.

Another major reason to do KM is the huge amounts of savings that can come from sharing smart solutions, getting fast and

good answers to questions, and avoiding the "re-inventing of the wheel" (which happens a lot).

It is also about protecting Intellectual Property. These are your companies trade secrets or methodologies which must be guarded diligently. Proprietary Designs, Beer Recipes, Strategic Information, Finances, etc..

Knowledge Management is also about who can see what. It is very likely that not all stuff in your company is viewable by all employees.

Knowledge Management will succeed best when:

- Top Management understands the need for it (no need to convince them)
- Top Management supports it by promoting it and recognising the benefits.
- Top Management provides sufficient funds on a continuous basis.
- It is being run by a dedicated, strong and enthusiastic team who do this as part of their career. (meaning: they take on this job for a longer period of time)
- Subject Matter Experts are identified and are active and visible.

Unless your company is only about IT or HR, do not allow IT or HR to run the show. Although they mean well and they really try with the best of intentions: IT is usually about automation and will drive to automate the management. (and people do it, remember?). Because of this IT-run KM systems often fail very quickly

HR may be focused on training which certainly is an item in KM, but it is only part of the package. A loss of focus may occur very quickly. IT and HR should be supporting and facilitating. In that role they can provide a very valuable service. Keeping IT and HR closely involved will always pay off big time: They are not an enemy but can be powerful allies.

A Knowledge Management program is a success when:

- People start complaining when it is out of order for longer than a couple of hours. (then you know it is used!)
- You see a regular activity in Forums and the questions being answered adequately in time (at Fluor we set the bar to 95% adequately answered within 48 hours).
- New Knowledge is being submitted on a regular basis. Do not expect the same rate as the Forum activity though.
- Forums are carefully moderated and have at least 4-8 hours of review time per day somewhere on the globe. It is important to act quickly!
- Sales uses the Knowledge Management program to sell projects. (then you have really made it).
- There is a constant improvement in the KM System, presentation, user friendliness, search capabilities, contents and probably a few more can be thought of.
- Feedback is given by the users. And every feedback is of value: Positive or negative. This keeps the KM leadership on their toes. NEVER become complacent. What is good today is substandard tomorrow.....

In short: Users have to see what is in it for them. Only then they will be willing to contribute themselves. The KM System has to make sense, must be relevant and must be trustworthy.

On a personal level this can also take the form of public recognition programs on a team/local office level. Small gifts will also work: I am still using a ballpoint pen with the Fluor logo and a 2GB USB stick. OK, I admit, I am easily pleased but stuff like this is just fun. Recognition pins and certificates signed by senior management are very often seen as very valuable.

At Fluor, it took us about five years of hard work to see a significant portion of the company actually using the system. Patience and hard work is the key. Expecting immediate results is a "pipe dream".

It Must Be Trustworthy

Do what you promise or don't promise it in the first place. This is the major challenge of any Knowledge Management system.

You can find huge amounts of information on the Internet but much of it is either posted without the proper context or is even (to an extent) wrong. And the inexperienced professional may be challenged to detect this.

Do not misunderstand me: There is also a lot of excellent stuff out there but how to distinguish between this and the "bad" stuff....

The solution is - of course - very easy: Make sure that the items in your KM system are checked and approved. If you use forums (Q&A) make sure that they are carefully moderated.

Nothing new here. Professional magazine articles and books have always gone through a thorough peer review process and well-managed KM is not different.

Peer/Expert review and approval, and forum moderation is the key to making users trust the system.

Even Wikipedia uses a pretty severe moderation/validation team of volunteers to make sure that the content makes sense.

One thing which is also important is to verify that knowledge still makes sense in the current environment of your company.

I once heard the phrase "Knowledge Ecosystem". This may cover the life cycle of Knowledge and how relevant (trustworthy) it still is. Evolution shows that species (Knowledge) which do not fit the current environment anymore must go extinct.

People are the key to any KM system

This is not a hollow phrase. Achieving trust in a KM system is not something that happens by itself. You must have participation from a number of experts in all the fields and disciplines your

company operates in. This ensures a rigorous review of all knowledge that is posted. Experts will be able to make sure that the context is correct and the submitted knowledge makes sense. That does not mean that the opinions of non-experts should be completely disregarded. Make sure reviews are performed publicly since you never know where really additional good advice could come from. This is also a way to surface new experts.

Forum moderators also play a role in this. Forums are always public and the really good replies can be posted which also surface new experts.

In my experience, it is best to actually name the experts and remove any form of self-proclamation.

It is also good to warn your potential experts that, "The role is not an honorary title, work is expected from you". This deters people who are after the title alone.

Many people will use the KM system as a look up and will never contribute or publicly ask questions. This figure is typically around 60% of your users who are:

- Scared to look "unknowing" in the eyes of peers or supervisors.
- Consider what they know is not of a sufficient standard.
- Not really interested (9-to-5-ers)

This is OK for a small organisation, as the KM team can fill the gap. But in an enterprise with a huge membership base (Fluor has 30,000) users need to be motivated to contribute by their direct supervisors.

These are extremely difficult barriers which often need attention on a personal level. The supervisors/department managers are the KM team's target audiences in this case.

People Make It Work

It is a total misconception that KM systems work by themselves. People make it work and practice shows that almost all of the time unmanaged KM systems will be short-lived.

Really powerful methods to build trust are:

- Forum Moderators: Make sure that Forum replies are on time, are relevant to the question and are useful.
- If a reply does not make sense remove it (and tell the author why).
- And even more important: Make sure that the question makes sense. Recognise that is not always easy to phrase a question correctly (work with the author to edit it).
- Knowledge Reviewers have to make sure that new knowledge is vetted (reviewed) and where necessary work with the author to edit it.

All of the above needs careful managing by a Knowledge Manager who may combine several roles as required. There is no fixed rule for this and it all depends on the capabilities and availability of the people involved.

This also means that the key people will be willing to invest part of their career in KM. KM processes are slow by definition, so a KM role should be at least five years (longer if you fall in love with it – as I did). Only then a person can make a difference.

As KM is positioned horizontally and vertically in a company: KM workers will have an interesting view of the company as a whole. This will hardly ever happen if you are on the shop floor.

Your reward as a Knowledge Manager is to see it all work smoothly and recognise that you have been "the grease in the wheels" most of the time. It is really a magnificent sight to see a well-functioning KM system in operation.

Rob Koene is Knowledge Manager at Fluor Corp. This article reflects his personal views and does not reflect the views of Fluor Corp.

Innovative Information Management by design

By Toni Anderson

Electronic document and records management systems (EDRMS) have been implemented over the last 20+ years as “a” means to manage information. Many of these products evolved from systems that were used to manage paper records, and they may be integrated with other business systems if sufficient funding and executive sponsorship exists.

During the 20 years of evolution of EDRMS, time has not stood still, with an explosion in the growth in of digital channels for social interaction and communication: Twitter, Facebook, Instagram, Snapchat, YouTube. Medium, Tumblr and Flickr The list seems endless.

The rapid changes we are seeing in the social media realm also extend into the broader business environment, with documents generated by multiple business systems and a workforce that is much more mobile.

We have all seen the effects of AirBnB and Uber on the hotel and taxi sectors. Atlassian co-founder Mike Cannon-Brookes believes there is even more significant change in the offing as a result of advances in driverless cars.

He recently stated that for the 2.5 million people driving cars as a significant part of their job, “Those jobs are all going away whether it takes 10 years, 15 years or 20 years, it doesn’t matter”.

Constant upheaval is challenging, but, it also provides opportunity for innovation, highlighting the need to think differently about our work – to be “change ready”.

In the information management sector, some of the common strategies that are adopted include:

- Using an EDRMS as a single tool to manage documents and records
- Capturing records created by other business systems in an EDRMS, either as an export or a manual process
- Integrating with business systems to capture and manage records via an EDRMS for record-keeping purposes
- Managing records within source business systems

Sticking with EDRMS as a single tool is becoming less and less practical:

- Business models are less stable – frequent organisational change, services may be provided through third parties, outsourced or privatised
- Organisations implement an array of systems to manage core business functions
- Business systems may have some of the features expected from a record-keeping perspective, but they seldom have all the functionality required to meet record-keeping standards.
- Exporting information from or integrating with business systems is often complex, expensive, takes time to plan and implement.

In a fast-paced business environment there is little tolerance for projects take a long time to implement – agility is needed. To quote one of my favourite songs by Queen – I want it all and I

want it now!

So where are the opportunities?

There is definitely the potential to manage our information by design, i.e. looking at the broad information architecture within organisations to:

- Focus on work processes and the information created
- Identify information assets, where they are and how they are managed (beyond EDRMS)
- Take a risk and value based approach, applying scarce resources to mitigate and control risks
- Influence early through established frameworks (Business planning, risk assessment and management, Procurement processes, contract and project management)
- Ensure system requirements address record-keeping requirements, assessing their level of compliance as part of system acquisition or upgrade
- Connecting with other specialist staff managing information security, privacy and access arrangements
- Participating in information governance processes and in other communities of practice

Taking a “by design” approach beyond EDRMS might include:

- Developing simple tools to assist non-specialist staff to navigate requirements as part of their business and system planning activities
- Designing self-assessments for business systems to identify risks and mitigation strategies
- Developing information management plans that are fit for purpose – for simple or complex systems, pre-planning system management, migration or decommissioning

Traditional approaches are changing, as professionals we can add value to management of information across operations, providing guidance as part of business processes and systems – by design.

Toni Anderson is a senior consultant with Recordkeeping Innovation and has worked in the information and records management field for a substantial period in a range of Local, State, Commonwealth government organisations and the private sector, nationally and internationally. Originally published at <http://www.records.com.au/blog/>



Many of the plethora of social media channels available today are relatively young compared to mobile phones, email and other portable devices.

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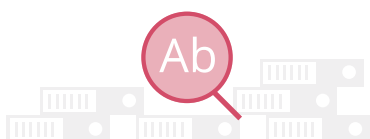
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Capture data from any documents, from structured forms and surveys to unstructured text-heavy papers.



Mobile Capture

Captures content from document images and photos via tablets and smartphones for instant integration into organizations' business processes.



Document Archiving

Captures paper documents and converts them into searchable digital files that include metadata, and which are optimized for digital archiving and records management processes.



Accounts Payable Automation

Automated invoice processing can help make AP departments more productive, and offer significant potential for immediate savings and fast ROI.



Mailroom Automation

Replaces time and cost consuming manual work for input-management by digitising, sorting and intelligently routing all incoming mail in one smart software application.



Document Classification

Automatically identifies various types of documents based on their layout, text or images.



Forms Processing

Automates data extraction from paper forms (e.g. credit card applications, questionnaires, damage reports, etc.) to reduce manual processing costs.

- Reduce document and data related Costs — usually by 50%
- Accelerate Transactions

- Fast ROI — usually 3 to 6 months
- Increase Visibility and Control

- Optimisation of data quality
- Reduce Operational Costs



Signing documents in the digital age

By Christine Ecob & Georgina Xiradis, Johnson Winter & Slattery

As technology advances, opportunities to update business practices are offered. However, the law is often one step behind, making it difficult for companies to employ new efficient business practices. Although many transactions are now conducted electronically, there are several exceptions to the validity of electronic signatures which limit the use and effectiveness of electronic communications. Business must keep these limitations in mind.

There are almost identical laws in each jurisdiction in Australia, which govern electronic transactions:

Electronic Transactions Act 1999 (Cth) (Commonwealth Electronic Transactions Act);

Electronic Transactions Act 2000 (NSW);

Electronic Transactions (Victoria) Act 2000;

Electronic Transactions (Queensland) Act 2001;

Electronic Transactions Act 2000 (SA);

Electronic Transactions Act 2011 (WA);

Electronic Transactions Act 2001 (ACT);

Electronic Transactions (Northern Territory) Act 2011; and

Electronic Transactions Act 2000 (TAS).

Validity of electronic signatures

A transaction is defined in the legislation to include a contract, agreement or other arrangement. So long as specific criteria are met when electronically signing a document, the transaction will be valid. There are three standard criteria that need to be satisfied in all Australian jurisdictions to ensure the validity of an

electronic signature:

- there is a method used to both identify the person signing and to indicate the person's intention to be bound by the transaction;
- in light of all the circumstances, the method is as reliable as is appropriate for the purposes of the electronic communication; and
- the recipient consents to the method of the electronic communication.

The first criterion would be satisfied if the person indicated their approval of the information in the communication (which evidences the transaction) via a mark, or signature.

The second criterion relates to the appropriateness of the signature method and several factors may be taken into account e.g. the type of transaction, the sophistication of the communication system, the value and importance of the information in the electronic communication.

There have been cases in Australia where electronic signatures have been used reliably to create binding agreements. In *Getup Ltd v Electoral Commissioner* [2010] FCA 869 the court found that a signature provided by a digital signature was valid on an electoral enrolment claim form.

The final criterion requires the parties to reach an agreement in advance regarding the use of the particular electronic communication.

However, even if these criteria are met, the transaction may not be valid if an exception applies.

Exceptions to validity of esignatures

In each State and Territory different exceptions apply to the use and validity of electronic signatures. There are five main categories of exceptions that may or may not be applicable in different States and Territories:

- documents that are required to be witnessed;
- documents to be personally served;

- court documents;
- powers of attorney; and
- wills.

In New South Wales, Queensland, South Australia and Western Australia, documents that are required to be witnessed cannot be executed validly by electronic signature. As most deeds executed by an individual are required to be witnessed, deeds should not be signed electronically in these States.

Powers of attorneys cannot be electronically signed in Western Australia, Northern Territory and Tasmania. In addition, in New South Wales, Queensland and South Australia, enduring powers of attorney must be witnessed meaning that electronic signatures of these documents will not be valid.

In all States and Territories, documents that are to be personally served cannot be executed by electronic signature. In New South Wales and Queensland court documents cannot be executed by electronic signature.

In Victoria, Western Australia and Tasmania wills cannot be validly executed by electronic signature. Although there is no specific exception for wills in New South Wales, Queensland and South Australia – wills in these states are required to be witnessed and so cannot be executed electronically.

The Corporations Act is exempt from the Commonwealth Electronic Transactions Act. The Corporations Act outlines how companies may execute documents without using a common seal under section 127(1) if signed by:

- two directors of the company; or

- a director and a secretary of the company; or
- for a proprietary company that has a sole director which is also the sole company secretary – by that person.

When a document appears to have been signed in accordance with section 127, the other party can rely on the statutory assumptions in section 129 of the Corporations Act, namely, that all relevant internal requirements of the company have been complied with and that the document is binding on the company.

If a document is electronically signed in accordance with section 127, the counterparty cannot rely on the section 129 assumptions because the entire Corporations Act is exempt from the application of the Commonwealth Electronic Transactions Act. There are other execution options for companies and a counterparty to a transaction can investigate the authority of an individual to execute a document on behalf of a corporation.

However, if a counterparty wants to rely on section 129 of the Corporations Act in relation to a corporation, the safest course of action is to obtain signatures of the directors and/or company secretary of the corporation using pen and paper.

The number of different exceptions to the validity of electronic signatures that run across the States and Territories limits the use and effectiveness of electronic transactions. If parties engage in electronic transactions they should be mindful of these exceptions and only use electronic signatures where valid.

For more information contact: Christine Ecob (+61 2 8274 9556, +61 414 921 522, christine.ecob@jws.com.au) or Ravi de Fonseca (+61 2 8274 9575, +61 404 808 487, ravi.defonseka@jws.com.au)

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Exclusive Interview With Tommy Petrogiannis, President of eSignLive

IDM recently had the pleasure of interviewing Tommy Petrogiannis, President of eSignLive (formerly Silanis Technology), the electronic signature provider he co-founded in Canada in 1992. Acquired in 2016 by Vasco Data Security International Inc. for \$US85 million, eSignLive is using the funding to fuel international growth, which is increasing at three times the rate of people performing transactions electronically in North America.

IDM: Only 1 in 5 deals are signed electronically these days, according to recent research released by Aberdeen Group. Why the holdout?

TP: There are several things that have driven the holdout on e-signature adoption and the biggest one we've seen is the need for education. In the US, we cracked that phase about five years ago when people stopped asking whether e-signatures were legal and safe. Canada followed about two years later, and I see APAC coming to the end of its education phase in the next few years. What we've found accelerates that education phase is when a leading brand goes public that they've deployed e-signatures, say a large financial institution or a large government agency. Then those perceived barriers evaporate because it becomes a competitive disadvantage if you don't adopt the technology. Europe is a good example of one of the other holdouts on e-signature adoption. There we saw e-signature laws that were rather technology specific – to e-sign, you used to have to use digital certificates or a credential that was issued to you, which is an extremely hard thing to deploy. I haven't seen anyone do it successfully, at least not at a government level, and very few agencies do it for their own users but not for the citizen and not for your end customer, if you're a financial institution. Since the introduction of eIDAS, the European Union has relaxed its e-signature laws we're seeing the region starting to catch up on e-signature adoption. Intuitively it's a no brainer. Intuitively, everyone should've adopted e-signatures already.

IDM: It's been 17 years since they got the legal tick of approval in Australia, which seems like a technological life-time ago. Yet, only in recent times have we seen a reduction in the fear and resistance associated with accepting e-signatures are valid and legally binding.

TP: After e-signatures became legal around 2000, it took about five years for North American financial institutions to say, "Okay, the laws are there, how does that apply to me when I'm doing a mortgage application or loan process?"

But before they could even bring electronic signatures into the equation to really get the true benefits of straight-through processing they first had to update their backend systems to have intelligent forms. That took them a few years.

The US market's grown since then, but it's still only around 15% adoption. Other countries including Australia are at single digit adoption, so there's still a lot of market expansion potential.

IDM: Many see key restraints hampering the growth in the signature market being the lack of cross order standardisation related to ecommerce laws and directives and high cost of e-Signature software licence. What would you say in respect to both of those?

TP: When it comes to cross border transactions, governments



Tommy Petrogiannis, co-founder and President of eSignLive.

are still grappling with how to have true interoperability.

I don't expect that to go away anytime soon. One thing that has changed dramatically though is the cost of e-signature software. eSignLive is unique in the sense that we're the only major e-signature vendor that allows you to use our multi-tenant SaaS if you want, or have the exact same code base as a private instance on the cloud or on premises. So, depending on the risk profile of the transaction that you're automating or digitising, and depending on the budget and how quickly you need to get up and running, you can select how you want to consume and deploy e-signatures because it's a per consumption model regardless of how you deploy it. Obviously the more you go to on premises, the more additional costs there are like hardware, or for a managed service if you have someone managing a private instance for you, but the actual use of the e-signature solution is the same regardless. If you go on premises, you just have more control about when things get updated, and when you release new features, whereas if you're using our multi-tenant SaaS we're pushing out new features every month. Some agencies say, "Whoa, that's too fast for us. We can't do enough testing." No problem, you can go to a dedicated instance and consume e-signatures at your own pace. So it's just a control aspect. But the cost aspect has pretty much gone away.

IDM: How do you see the impact of the cloud model impacting on the adoption of e-signature solutions?

TP: We're seeing a number of customers adopt multiple models. For instance if you're doing a very high volume complex transaction like a mortgage closing: in the U.S. you can have up to 85 documents involved in a closing package, so that's a lot of data (eight of the top 10 U.S. banks are using eSignLive). And what we found for the very large producers like the Tier One institutions - pushing that data up to a cloud instance and then bringing information back and tracking it - the physical network latencies become an issue for them. So, for processes which don't need to be close to your data centre or document

generation

engines, you can use the SaaS model but in some cases where you may have very, very high volumes of data that needs to talk to home grown loan origination systems or underwriting systems, this may not be appropriate. In some instances they need to have it on-premises because everything else that it connects to is on-premises and they weren't designed to actually talk to the Web effectively and get out to public cloud instances. The SaaS model is great for the flexibility of developing and deploying solutions, but there may be some exceptions with high volume complex processes that requires the flexibility to put it in your own data centre, which gives you tremendous performance and ease of use and scalability.

When eSignLive started, the Cloud didn't exist, which meant all our customers were on-premises. But when we said, "Okay, the market's matured now to the point that a SaaS model is going to get adoption", we were fortunate enough that Amazon had been out for a couple of years. So we jumped onto Amazon Web Services, then IBM SoftLayer and Azure: we support all of them. It's because of this that when we said we were coming into Australia, we had a production grade system up and running two weeks later.

And we did that in Germany, we did that in the UK. Because again, data residency and sovereignty absolutely matters for government agencies, for banks, for healthcare providers.

eSignLive is the only e-signature vendor that has the ability to quickly spin up a data centre pretty much anywhere in the world and that's an important differentiator in driving adoption in regulated and government markets.

IDM: You mentioned the challenge for the banks to update their backend systems, in the public sector one of the obstacles to eservices is often the limited budget and resources to update legacy systems for smartforms and e-signatures.

TP: Preparing your systems to create forms that are practical and useful when they're electronic as opposed to fill and print is a barrier that still exists for government. For ad hoc processes, not high volume processes, deploying electronic signatures is very simple. If you're creating a Word document that you want people just to sign, that's super simple to do, there's nothing holding you back from using it. You can literally start using electronic signatures right now as part of that solution.

However, when you have backend systems that are producing the content, that is always the barrier. That and also willingness to move to the cloud.

It's only in the last year and a half that we have seen major agencies move to the cloud in the U.S. Agencies couldn't use solutions on the cloud unless they were FedRAMP certified which is another level above SOC 2 certification. And to date we've been the only e-signature provider that has a FedRAMP certified solution.

In the U.S. market place, we've been providing solutions to the government since 1995 and most of those solutions were for internal process improvement, rather than citizen-facing. It was all for streamlining expense reports, requests to travel, etc.

Once they wanted to move to citizen-facing transactions or government-to-business transactions, they had massive investments that they had to do because they had to get their systems converted and ready to go. Governments around the world haven't yet grasped the power of the cloud and the SaaS delivery model because they do have additional regulatory concerns, and privacy concerns that most commercial organisations don't have to factor in.

IDM: One of the perceptions that can cause people to be negative about e-signatures is how is that signature retained, how can I guarantee that I'll have a record of it in 7 years,

whatever period I need to retain it for, if the platform disappears or the company disappears, what are the assurances you're able to offer in that regard?

TP: I think it used to be a fair concern but for folks who follow standards, it's not an issue and I'll give you a simple example. Adobe has done a great job of publishing its standards so we follow Adobe's standard for how you sign a PDF document.

This means anyone who wants to verify a document signed by eSignLive can do so independent of eSignLive, unlike some of our competition where if you want to verify a document you have to go back to the service provider to actually verify it. So we can disappear tomorrow and as long as you have an application that follows today's standard, you have retention for as long as the stamp is there and it's a published stamp.

So you don't have a big issue and the truth is what we've seen after about seven to 10 years, if there hasn't been a need to go back to that document, that requirement for retention drops off pretty dramatically. There still are a lot of companies that don't follow standards, but as long as you pick a vendor that does, you can't go wrong from a retention point of view..

IDM: Does the eSignLive e-signature solution also require that the signed documents are hosted on your platforms?

TP: We offer it for many smaller customers, as they also want us to do the basic document retention so that's part of the service but it's not a requirement. The larger organisations are typically integrating eSignLive into their systems, they use a transaction platform and then they take the content, store it in their own ECM or content management solution. In the larger organisations you typically start off in one line of business. It might be the retail banking person who's responsible for that. And usually after the first successful project that they deploy, the buyer ends up going into the IT department because they now make it as a short service across the enterprise.

What we also do – and we're unique in the space – is we're capturing everything that's happening during the transaction. Every page you saw, how long you saw it, what actions you took, and what IP address you're coming in from (because in the more complex and sophisticated transactions, it's not a single 'come in once and get off' process). If you're doing a mortgage closing, this could span two to three weeks. From a consumer protection point of view and from the governance point of view, it's not just about signing the document, it's about, "Did you present that disclosure? Did you present your truth in lending policy? Your privacy policy? Were they accepted?" So the user's going, "I accept, I acknowledge, I agree." We're recording everything that's happening, what they've done and then at the end of the process, we sign the transaction also – all that data – and we link that into the document that you actually sign so you can demonstrate cryptographically that the only way that this final contract got signed is if all these steps took place. If a regulator or an auditor wants to see that you're following the rules, with our system you can push rewind and it'll recreate a transaction completed five years ago. Look at what happened in the UK with the PPI (Payment Protection Insurance) scandal, that was more than £26B of damages where the banks were accused of upselling, slipping in mortgage protection which they weren't disclosing properly. So the regulator came in and slapped them silly, £26B in damages, and it was not about the fact that the person didn't sign the document, it was about the process that they used which didn't meet the regulations.

From a functionality point of view, all the signature providers look and feel pretty much the same, features and functionality and virtually on par. But it's these core underlying things – the white labelling, the evidence and audit trail, the common code base across deployment models – that the consumer doesn't see but the organisations who provides the service definitely understand. And for them, doing it right absolutely matters.



Bad RM no excuse for stonewalling FOI: Information Commissioner

Information Commissioner Timothy Pilgrim has ruled that poor record-keeping practices are no reason for the Australian Securities and Investments Commission (ASIC) to charge exorbitant fees for a journalist's FOI request.

The Australian newspaper had sought correspondence between ASIC and the National Australia Bank (NAB) following reports that ASIC had allowed NAB to check and alter one of the regulator's press releases, to determine whether this was a one-off or a regular occurrence.

The FOI request was made in February 2015. Three months later, on May 1st 2015, ASIC responded that the request would cost \$A4,380 to process and claimed it required "228 hours search and retrieval time and 45 hours of decision making time."

ASIC submitted that '[a]s the Scope of the request covered multiple matters over a long period of time, collating relevant documents required considerable coordination and input'.

In his decision to strike out the \$4380 fee, Mr Pilgrim noted "While the FOI Act does not mandate particular methods of storage of documents by agencies, in processing an FOI request an agency cannot shift its costs resulting from an inefficient records management system to an FOI applicant."

"ASIC's own detailed breakdown of work done demonstrates the inefficiency of its document handling system."

"An underlying assumption in calculating search and retrieval time is that the agency or minister maintains a high quality record system."

"Search and retrieval time is to be calculated on the basis that a document will be found in the place indicated in the agency's

or minister's filing system (reg 2(2)(a)) or, if no such indication is given, in the place that reasonably should have been indicated in the filing system (reg 2(2)(b)). The 'filing system' of an agency or minister should be taken as including central registries as well as other authorised systems used to record the location of documents."

"Time used by an officer in searching for a document that is not where it ought to be, or that is not listed in the official filing system, cannot be charged to an applicant. In summary, applicants cannot be disadvantaged by poor or inefficient record keeping by agencies or ministers."

ASIC had submitted that its search & retrieval estimate included 25 hours for one officer of the Financial Adviser team to:

- search his own email in-box and relevant folders
- request three Executive Assistants to search three email in-boxes and provide to him any relevant documents, which he then 'perused'
- liaise with IT to obtain access to a former staff member's inbox and conduct a search of it, and
- save 49 relevant documents

According to ASIC's own published Guidelines on records retention, all "emails messages and correspondence documenting discussions with senior management, external agencies, businesses, industry professionals and other individuals that involve decisions and advice regarding financial or legal issues or other key work processes and courses of action" should be captured in the corporate record-keeping system.

Mr Pilgrim observed that "While the scope of the request is specific, in that the applicant is seeking various background documents relating to 12 nominated ASIC media releases, it is

clear from ASIC's submissions that documents relating to the preparation of each media release were not filed together nor were they effectively categorised and readily retrievable through an appropriately configured records management system.

"Rather, on receipt of the request it is apparent that ASIC had to discuss with a significant number of officers the likely locale of relevant documents and carry out searches of many separate electronic storage areas (and in one case hardcopy notes). This includes searches of a large number of particular employees' email accounts, at least one of whom had left the organisation.

"It is therefore apparent that many of the documents at issue were not integrated into a records management system which could readily identify and collate relevant documents.

"I consider that efficient record keeping could have documents relevant to each media release located either together in a single file or effectively categorised and readily retrievable through an appropriately configured records management system. Had this been done, it is apparent that much of the manual search and retrieval work that ASIC had to undertake in response to the request could have been avoided."

A 2016 advertisement for an Information Governance Manager at ASIC highlighted a "significant technology transformation" underway at the Federal Government Agency in a number of areas such as virtualisation, mobility, cloud & roll out of Microsoft applications in the enterprise such as Microsoft Dynamics, SharePoint and SQL services. In 2007 ASIC received increased funding of \$A116.7 million over four years to "invest in essential business support tools including electronic document and records management systems and data warehousing."

Mr Pilgrim also ordered ASIC to entirely waive the fee because the request, which The Australian filed two years ago, was in the public interest

"The FOI request was lodged following reports in February [2015] that ASIC allowed NAB to check and alter a media release dealing with serious problems with its Navigator wealth management platform.

"These reports came amid a crisis of confidence in the financial services industry and ASIC's enforcement of the law regulating financial service licensees, especially big banks.

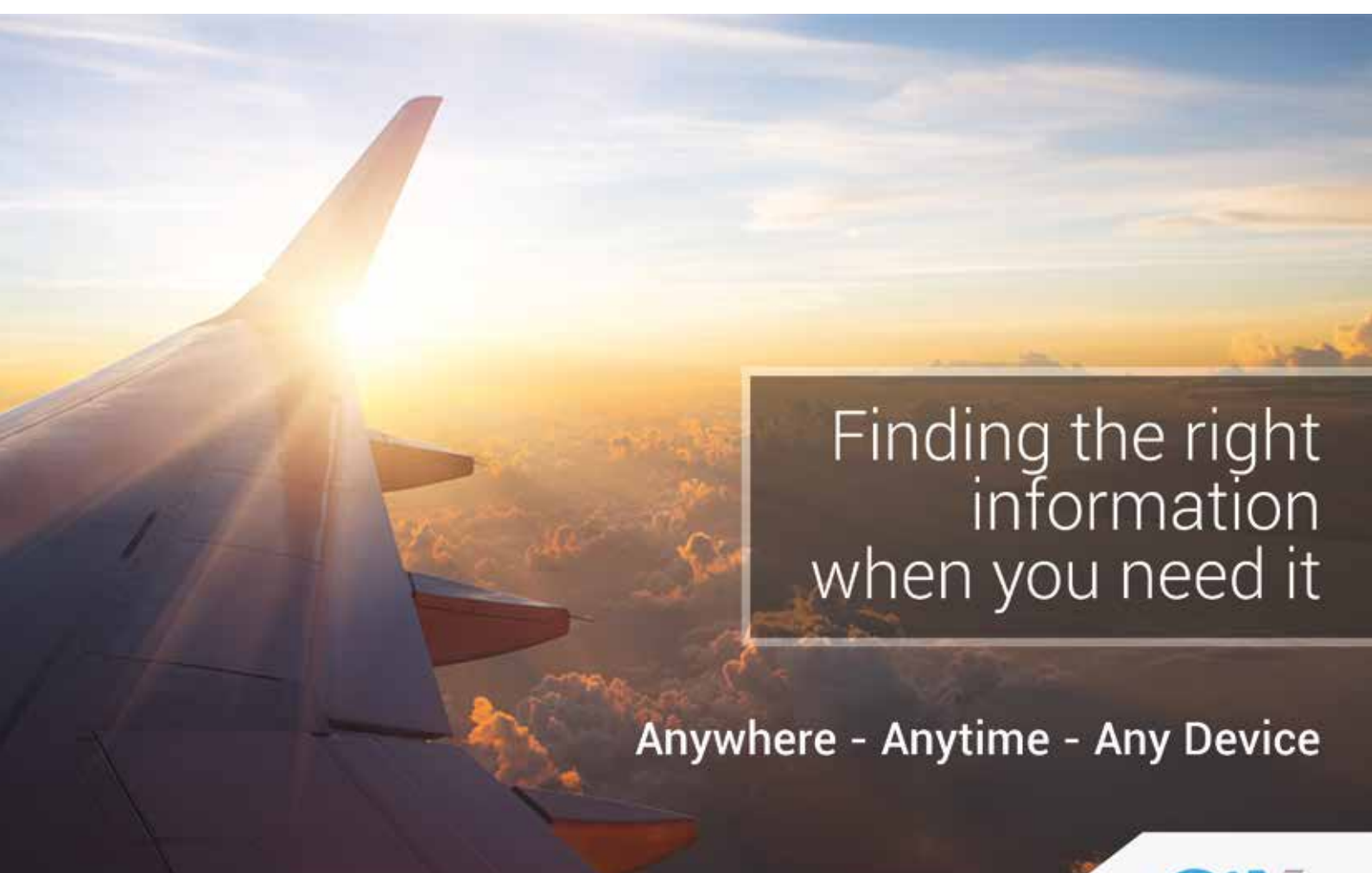
"The question that therefore arises and underpins the FOI request is: was this a one-off or has ASIC regularly allowed the regulated population, especially large institutions, to edit its output?

"This is self-evidently a matter of wide public importance. The documents deal with ASIC's administration of the law covering hundreds of thousands of customers and hundreds of millions of dollars," said Mr Pilgrim.

"The documents in this case relate to ASIC's regulation of major corporate financial institutions. The applicant is seeking access to documents that would potentially provide insight into ASIC's relationships with those institutions. Specifically, whether, or to what extent ASIC has allowed those institutions to contribute to the content of its media releases.

"I agree with ASIC that there is a general public interest in the matters to which the request relates. I also agree with the applicant that 'ASIC's administration of the law covers hundreds of thousands of [financial institution's] customers...', which is a substantial section of the Australian public. In my view, giving the applicant access to the documents in this case may serve to better inform the public of ASIC's regulatory processes and would likely contribute towards increasing scrutiny, discussion, comment and review of the Government's activities."

The full judgement is available at <http://www.austlii.edu.au/au/cases/cth/AICmr/2017/18.html>.



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Digital Transformation **DONE RIGHT!**

By Dan Pulham

There's a lot of talk about 'Digital Transformation' and (if the number of articles on Medium and LinkedIn are anything to go by) a lot of views on what it actually means.

Having spent five years as part of the digital transformation of Australia's biggest telco, and more recently working on the Federal Government's digital agenda, this is what I think when I hear the term.

Digital isn't just about technology, although it's obviously underpinned by it. Digital is more an attitude; it's a way of life and now a way of doing business. We are engaging in digital lives when we check Facebook on our phones or interact with a service provider via their app whenever we want. It is about dealing with the 'always-on' world.

When a company or government embarks on a Digital Transformation, it should be about breaking down the barriers between the people who support the business

and the technology that enables it. It's about bringing those people closer to the customer they serve via a digital interface.

When done well, the people supporting your business are only dealing with customers for high-cost, complex transactions. All the low-value, low-cost transactions - those your customers don't want to call or visit you for - should already be taken care of by digital means.

When done really well, there isn't even a need for your customers to interact with you digitally. They know where they're at with your products and services, and they have confidence your business will contact them only when totally necessary.

Digital Transformation is about transforming a company from within. Technology needs to enable the interaction between internal and external customers in as near realtime as possible, not getting in the way. It should be seamless, intuitive and even delight in such a way as to

actually enhance the brand because it's so simple customers are loath to switch. Digital should extend to the tools your staff use to interact with each other, so that in the same way your digital interface makes it easier for your customers, your internal digital work space makes it easy for staff to collaborate.

Digital isn't just about the front-end or the website, although you can always tell a company that hasn't thought through (or started) implementing its digital strategy when its online and mobile experience is clunky or hard to navigate. Simple is hard to do; it's always easier to expect customers to do the hard work in navigating what 'you' think they should do to interact with your business - and the information you expect them to provide to do so. That's why so many companies pay lip service to Digital Transformation. They see it as another layer to their already expensive IT costs, and not worth the effort to make it frictionless for the people who use it.

This attitude is visible in most interfaces people use; ones that are designed from the bottom up and are therefore constrained by the limitations of whatever database or back-end solution that was brought 'out of the box'.

Anything that can be configured probably isn't going to give you the flexibility you need, so it's worth investing time and money to build a truly great customer experience. You will also need to continue maintaining and improving your set-up. The world is littered with interfaces delivered by projects in one go, where the

improvements, enhancements and 'nice to haves' have been left on the shelf in the rush to meet some (usually arbitrary) deadline. You can't use the same approach as your traditional IT programs; your digital interface will need to evolve, with small changes made more often.

Digital Transformation isn't possible if you maintain the separation between Business and IT that exists in many companies. The analogy of bringing your customers closer to your business by a digital interface must be reflected internally by creating empathy between these two groups and bringing them together in your organisation with a common 'digital' vision.

Gone are the days where the 'Business' shows up to I.T. with a list of requirements and a bag of cash and says, "Build me this". We aren't building houses or bridges; Digital Transformation is about continual investment and improvement.

Even a small investment in improvements to your digital interface, internal or external, which shave seconds off a task or remove a barrier to progress are worthwhile. Seconds are precious in a digital world; they may mean the difference between a customer staying or giving up on you in frustration.

For at the heart of digital and the transformation there needs to be a fundamental change to focus on the customer, and the investment in that interface and the thought behind it that puts the customer needs first, is the clearest indication that you care about them.

Govt. transition delays blamed on lack of dollars and legacy apps

Funding constraints and legacy infrastructure have been cited as the main barrier to Australian government agencies transitioning to digital information management, according to a report by the National Archives of Australia (NAA).

The report was delivered to the Attorney General in August 2016 but was only recently made available on the NAA's Web site. It analyses the progress in the Australian's government's Digital Continuity 2020 Policy and is based on data self-reported by Commonwealth agencies. According to this, three-quarters of government agencies now manage their records digitally. The NAA report includes a listing of agencies rated according to their level of maturity in the digital transition, from High (most advanced), Developing to Initial (just beginning their transition).

Some major Commonwealth agencies in the 'Initial' stage include: Australian Electoral Commission, Australian Federal Police, Australia Post, Department of Finance, Department of Health, Department of Immigration and Border Protection, Department of Industry, Innovation and Science, Department of Parliamentary Services, Department of the Prime Minister and Cabinet.

"Although agencies have made progress in digital information management, there is still more that needs to be done", Archives Director-General David Fricker said.

"The continuing potential for loss of valuable

government information is one of our greatest concerns. We are working together with agencies to improve that and assist with their progress towards digital information continuity by 2020"

Some success has been achieved in reducing the costs of storing physical records, according to a comparison of 2015 and 2016 survey results.

Data provided by agencies indicates that substantial improvements in digital information management have been made. In particular,

- A decrease in the cost across the Commonwealth of storing physical records of \$A94 million per annum. In 2016 agencies reported the annual cost of storing physical records was \$A126 million, compared to \$A220 million in 2014.

- An increase of 44% over 6 years in the number of agencies managing records digitally. In 2016, 74% of agencies reported they had transitioned to digital information management compared to 30% of agencies in 2010. This is consistent with Check-up Digital 2015 data which indicates that 73.9% of agencies are operating digitally by default.

The National Archives has promised to report annually for at least the next 3 years to Government on the status of digital information management in agencies.

[http://www.naa.gov.au/Images/Report to the Minister 2016 - Digital Transition and Digital Continuity 2020 - FINAL_tcm16-95403.pdf](http://www.naa.gov.au/Images/Report%20to%20the%20Minister%202016%20-%20Digital%20Transition%20and%20Digital%20Continuity%2020%20-%20FINAL_tcm16-95403.pdf)

Accelerating transformation: here's why information governance is the new black

By Sonya Sherman

A natural tension between freedom and control for public sector information assets can easily create obstacles to transformation and a shift to digital processes. Information governance empowers you to get the balance right.

Consider this: "On the one hand, information wants to be expensive because it's so valuable. The right information in the right place just changes your life.

On the other hand, information wants to be free, because the cost of getting it out is lower and lower all the time. So, you have these two things fighting against each other."

In an era when tech trends seem to come and go like teenage fashion, this paradox was first put forward by seminal technology pioneer, futurist and environmentalist Stewart Brand, at the first "Hackers" conference in 1984 in Marin County, California. The statement hails from an era when a DIY computing counter culture spawned such giants of innovation as Apple and Microsoft, along with others long since forgotten. 'Information wants to be free' became a catch cry for cypher-punks and hacktivists.

That assertion might sound like the perfect truism for working in modern government today as the drive for digital transformation gathers pace. But it's really Brand's first observation – the potential for the right information in the right place to change lives – that's even more relevant today than it was then, and here's why:

Since the dawn of the internet age we have become an information society. Our lives at work and at home, in business and social activities, revolve around accessing and exchanging information. The public sector is still under pressure to be more open, more transparent and to release more data. Agencies are also regularly the subject of public and media criticism stemming from concerns about privacy, cybersecurity and excessive or intrusive collection of data.

Like Brand's paradox, there's an inherent tension between freedom of, and control over, information which can easily create obstacles for public sector transformation and a shift to digital processes. How then to address both parts of the puzzle and get the balance right? Information governance provides an authorising and accountability framework for creating, valuing, using and managing information assets. It takes account of business needs, legal and regulatory obligations. It establishes roles, responsibilities and reporting requirements, along with principles you can build into operational processes and IT systems to enforce controls or streamline decision making.

Information governance is not new but has experienced a sudden spike in popularity. Once the preserve of records managers or compliance officers, information governance is now recognised by all levels of the organisation, from ministers through to frontline staff, as a key to safety and agility. Not only that, it is acknowledged as a foundation for the entire transformational journey to a digital government.

In the digital age, everyone knows how great it feels to have the right information in the right place when we need it most – customers and service providers alike. Good governance enables agencies to be collaborative, mobile and transparent, while ensuring information accuracy, reliability and security are never compromised.

If you don't see up-front acknowledgement and detail on information governance on your transformation roadmap, it may be time to start asking questions.



Transformation benefits are real. These metrics come from a NSW government central agency.

Information needs to flow to add value

Ministers and senior executives now recognise that all business – including government business – today runs on data and digital information. It flows through every process, underpins policy, powers transactions and has the potential to drive whole economies. Information can, and must, move between different people and organisations, for a variety of uses or actions and to support services and decisions.

Organisations that 'go digital' increase the speed and efficiency of their work processes by letting information flow.

They frequently report further benefits including business insights based on real time data and a growing culture of innovation. But it's important to remember that just 'going digital' without solid underlying governance structures can produce unintended consequences that detract rather than add value.

If the value or integrity information diminishes, it can quickly erode public trust, or expose key stakeholders to serious liabilities – if it is the wrong information, or ends up in the wrong place. Add mandatory disclosure obligations for data, privacy or information security related incidents and it's not difficult to identify where the pain points can occur.

Allowing multiple parties within the organisation to view, reuse or contribute to an information asset can increase the value of that asset. This reduces the relative cost of producing the right information and offers broader public benefits when limited resources can be put to optimal use.

The "info-flow" challenge

Most agencies have developed robust information governance frameworks to manage their complex mix of risks and balance public interests. That's a good thing. Such frameworks take significant investment of time and expertise and are intended to streamline decision making and appropriately release or protect information with a minimum of bureaucracy.

The challenge for digital process transformation arises because information governance is usually stuck in a box. It's often attached to a single system or silo where the information is stored.

While information is stored in that box, it's managed and controlled. Once out of the box, information may move through un-governed channels where it is more difficult to track or protect and this legitimately makes people nervous.

Nevertheless, information still needs to flow to be useful. People respond to this tension in different ways.

Common behaviours include:

- Holding onto manual processes, which feel safer because

they're slower, but create an efficiency drag.

- moving information into and through ungoverned digital channels, based on a case-by-case assessment that benefits will outweigh the possible risks.

Neither scenario is optimal.

Process governance for secure 'info-flow by design'

By linking existing information governance to process automation you can set governance free to follow the information where it needs to go. Information doesn't have to live in one place. It can safely travel between different systems.

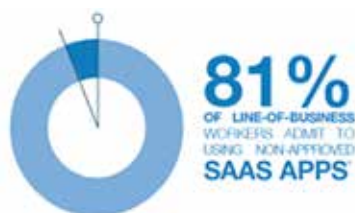
We call this process governance.

Process governance means people can continue to work in familiar applications from any location. Staff are empowered to share and release non-sensitive information, safe in the knowledge that protection for privacy and security is built into the process by design.

Automation brings information to the right place, where and when it is needed.

Process governance applies information governance in the background, every step of the way, and controls risks by ensuring it's the right information and access to it is managed according to established rules.

Importantly, process governance also allows transformation to be tackled incrementally – or 'chunked down'.



Where knowledge workers gather

A steady supply of reliable data and information is the currency of knowledge workers, executive or operational, in government today. Their success also depends on opportunities to communicate and collaborate with peers and stakeholders, who can review or contribute to their work.

Digital government relies on collaboration and information exchange across teams, between agencies and jurisdictions, with service providers and customers. The synthesis of diverse perspectives supports innovation, decision making and actively manages risk. It drives better service design, policy development and strategic planning.

Of course, agencies are the trusted custodians of personal and other sensitive information relating to health, law enforcement, environmental, cultural or commercial matters. They have a responsibility and a legal obligation to protect people's rights and ensure accountability.

Former Australian Public Service chief Peter Shergold AC stresses the fundamental importance of good records and collaboration across sectors as a critical success factor in government policy initiatives.

Shergold also highlights the real risks of 'solutioneering' before properly scoping the problem, and then trying to re-engineer crucial governance requirements.

The collaboration challenge

An urgent and growing need exists for the public sector to partner with industry and non-government organisations to deliver efficient, targeted services and improve public outcomes.

In a report commissioned by the NSW Public Service Commission, Nous Group identified the "size and complexity of public sector structures [and the] fragmentation of knowledge across these structures" as a core driver of cross sector collaboration to allow different experts to work together to solve multi-faceted problems.

Critically, the report identified governance as a key enabler of successful collaboration.

The collaboration challenge arises because information governance usually stretches only as far as the boundaries of the organisation. The use of unsanctioned digital channels or "shadow IT" for collaboration and sharing information with external parties can erode information security and auditability, impacting value and integrity. It exposes agencies to a variety of risks including unauthorised disclosure of information, duplication and version control issues, and (ironically) the creation of information silos.

So here, again, we have this tension between the concepts of freedom and control. On the one hand, productivity and the value of information is potentially increased by collaboration.

On the other hand, security, privacy and the quality of the information may be compromised by collaboration.

Collaboration governance

By linking existing information governance to shared workspaces, agencies can extend their governance policies into the places where knowledge workers gather. Information can be safely shared outside the team and beyond the boundaries of the organisation. We call this collaboration governance.

Collaboration governance means people can work effectively together and partner in a variety of ways with access to the information resources they need, whilst maintaining the integrity of the information along with the rights and responsibilities of all stakeholders.

Shared workspaces enable knowledge workers to share ideas and expertise, bringing information to the right people, where and when it is needed. Collaboration governance applies information governance in the background. It controls risks by ensuring it's the right information and that access to it is managed according to established rules.

Information wants to be free – free to flow to the people that need it most and the places where it is most useful.

Information also has value to those who produce, procure or are parties identified in the content. Its integrity and security are equally as important as its availability.

Digital era government provides the opportunity to:

- transform processes and let information flow, to support better services and faster decisions
- address the collaboration challenge and securely share information with other parties to solve complex policy problems.

The right information in the right place does change lives for the better, that's why today information governance is 'the new black'.

Digital fads may come and go but good information governance will endure well into government's digital transformation and beyond.

Sonya Sherman is a data and information specialist for Objective Corporation supporting innovation, collaboration and digital transformation in government business. She has held senior public policy and advisory roles in Australia, UK and the Caribbean. Sonya is a strong advocate for digital transformation in the public sector, maximising the use of data and information for better policy outcomes and greater public value.





How to Ensure Your Digital Transformation Initiatives Thrive

By Henry Patishman

We've seen what digital transformation can do through the disruption of many consumer and B2B services. Recall the demise of Blockbuster Entertainment's physical stores when Netflix first delivered movies to mailboxes, then digital streaming directly from TVs and mobile devices. Or the battle taxi services endured when Uber's ridesharing app reaped market share.

From a B2B perspective, we saw the move from on-premise CRM applications like Oracle and Siebel to cloud CRM Salesforce.com, and dedicated corporate data centres moving to Amazon, Google and Microsoft public and hybrid cloud hosting.

Improving the customer experience is at the heart of digital transformation initiatives. In this endeavour, organisations have needed to improve operational efficiencies and work with leaner staff by digitising processes for improved process transparency and accuracy, ease and speed of transaction, customisation, and customer satisfaction.

By the end of this year, IDC expects over 70 percent of the Global 500 companies will have a dedicated digital transformation or innovation team, and by 2020 all enterprises' performance will be measured by benchmarks in customer engagement, digitisation of new and traditional offerings, operational efficiency and organisational agility.

Unfortunately, IDC also believes that at least one-third of these leaders will fail to clear these digital transformation hurdles. Here's how to ensure your digital transformation initiatives are successful.

Update Your OCR Technology

At the heart of the digitisation revolution is the ability to accurately and quickly automate the capture of information from any source. It started with automated mailrooms and expanded to other units of the enterprise including accounts payable, human resources and customer relationship management.

Intelligent capture and removing the reliance on paper are the first steps in a digital transformation process, but organisations are still using OCR solutions from the beginning of this century. Legacy OCR solutions extract static data and house data in an aging repository.

Today, capture needs to extend to all sorts of data forms ranging from proof of delivery, proof of income, proof of ID, new account forms, claims forms and more. Once digitised, the data must be classified, extracted and verified to support and integrate with downstream processes to action information.

For the customer experience to be truly transformational, data needs to be understood within the context of the customer's

need and cross-referenced with the company's pre-set rules and policies to make better business decisions.

In some cases, the knowledge gained through analysing captured data can become a product or service. IDC estimates that by 2019, 40 percent of IT projects will create new digital services and revenue streams that monetise data. This could include custom or context-driven products, services and upsell offers.

However, not all data is nicely packaged in preset forms. The challenge with unstructured data, such as handwritten notes and social content, is it requires a more sophisticated, linguistic-based approach for capturing, classifying and extracting then injecting intelligence into business processes.

By using natural language and deep semantic processing at the sentence, paragraph and document level, unstructured and semi-structured data can be used by knowledge workers to extract value and understand meaning and relationships between entities in a single document or across a corpus of documents. This provides unprecedented insights to make smarter business decisions quicker, such as fund a new account, give credit, sell a car, or upsell a product.

Gain executive-suite support

A managing director at PwC recently listed ten ways organisations can succeed with digital transformation.

Not surprising, the top three included having C-level support and direct involvement with the strategy. While that is ideal, line-of-business owners are increasingly responsible for reassessing existing processes as part of the digital transformation initiative, especially among mid-sized organisations.

A key part of the effort is automating manual business process through intelligent data capture, classification and extraction to feed new or rapidly evolving customer facing business processes. Additionally, depending on the size of the company and the maturity of the initiative, IT will continue to play a role in qualifying vendors ahead of C-suite involvement.

Digital transformation needs to be a holistic approach to service customers. Information coming into an organisation from multiple channels contain essential data that drive business processes and enable automation.

With paper and electronic documents both widely used for customer interactions, it's clear that smarter data capture is essential for smarter business processes. Intelligent capture can reduce costs and cycle times, but more importantly, can enable digital transformation of customer-facing processes. Organisations must start with an intelligent foundation where context and content deliver a better understanding of your company's data.

Henry Patishman is Director of Sales (Australasia) at ABBYY. Contact ABBYY at sales@abbyy.com.au or on (02) 9004 7401 for any further information.



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Australian firms up on Teams

Organisations as diverse as Amicus, Blackmores, Objective Corporation, Readify and RSL Queensland are some of the first Australian users of Microsoft's new chat-based workspace in Office 365, Teams.

In preview mode since November 2016, Microsoft says Teams is now available to now available to all Office 365 business

ASX-listed software developer Objective Corporation has been using Microsoft Teams as a secure platform for one of its design teams. Led by senior product manager Angus McDonald, the group brings together business analysts and usability experts to map out innovations for Objective's enterprise content management (ECM) system.

Through Planner, Teams gives the group access to a Kanban board to steer its discussion, and persistent chat provides all the content needed to support and streamline the design process.

Australia's leading natural health company, Blackmores, has rolled out Office 365 to six countries in Asia so that its 1,000-strong workforce is now on one cloud platform.

It's IT team is also using Microsoft Teams to manage work across multiple projects, supporting the technology transformation initiative being led by CIO Brett Winn.

Andrew Grech, head of IT operations for Blackmores, says the tight integration of Office 365 and Microsoft Teams means that when a group is working on a project, everyone is assured that the most current artefacts and content are available immediately.

"The benefit we're seeing from the collaboration on Office 365 is huge," Grech says. "We're able to work as one team in real time, helping us reach decisions quicker and drive engagement and connection within the business."

Additional features of Microsoft Teams now available include:

- an enhanced meeting experience, with scheduling capabilities
- mobile audio calling, with video calling now available on Android and coming soon to iOS and Windows Phone
- email integration
- new security and compliance capabilities.

ANZ Bank enhances KM with Knosys

ANZ Bank is underway with an expanded rollout of the Knosys knowledge management platform across its business units.

Australia's Knosys has developed the platform to allow organisations to better capture, manage and access information across disparate business units, divisions and IT platforms.

A new order from ANZ Bank for \$A34,000 is for an initial two-month licence period commencing on 1 May 2017 and ending on 30 June 2017, the annual licence renewal date under the existing agreement. Upon annual renewal of the licence arrangement from 1 July 2017, this additional order will contribute a further \$A200,000 per annum to group revenues.

Knosys Chief Executive Officer, John Thompson, said that this expansion further reflects the confidence that this major customer has in the company's capacity to deliver a superior knowledge management technology that brings real benefits to its workforce and business units.

He said the web based architecture of the solution enables its rapid setup and deployment across the business units.

"This extension builds on our longstanding relationship which dates back almost 8 years," said Thompson.

"We plan to work with this and other customers in 2017 to continue to improve our product's capabilities and performance. We have some exciting developments planned for this year to enable more knowledge based solutions to become mainstream in many organisations.



"We intend to become the premier Australian company assisting medium and large organisations build smarter, faster, more efficient workforces through performance-based knowledge management solutions.

www.knosys.it

Singapore Air flies ahead with ViaSat

Singapore Airlines has selected ViaSat's AeroDocs document management system to distribute its digital documents in a secure, controlled manner, with advanced workflow tracking to help maintain aviation regulatory compliance.

AeroDocs is a modular, aviation-grade document management software system that gives airlines complete control over the editing, distribution and viewing of their documents. It is designed to handle a mix of fleet sizes and aircraft types, enabling it to scale with Singapore Airlines. The software's pilot document iPad viewer delivers a best-in-class document viewing experience.

Don Buchman, Vice President and General Manager, Commercial Mobility business at ViaSat, added, "The AeroDocs system was designed around end-user needs with a focus on getting correct, updated documents to pilots. In working with the award-winning Singapore Airlines, we are tailoring the AeroDocs software system to help them maintain their operational excellence through greater compliance, collaboration and usability."

The AeroDocs document management software system was acquired by ViaSat in November 2016, through ViaSat's acquisition of Arconics, a provider of software solutions to the aviation industry. Through this transaction, ViaSat gained key aviation-grade software and mobile applications to make flying safer and more efficient for pilots, cabin crews and flight operations teams. ViaSat is also supplying Qantas with technology used to introduce its first in-flight Wi-Fi trial on a Boeing 737-800 aircraft.

ViaSat claims to offer the best in-flight internet in the sky, with typical speeds 10 times faster than traditional in-flight Wi-Fi services. The faster connection speeds - which enable streaming - are made possible through the NBN Sky Muster satellites, the only satellites servicing Australia with the capacity to offer enhanced services. The Sky Muster satellites represent a significant upgrade over older satellite technology accessed by most airlines around the world. The in-flight internet service uses excess idle data capacity, with the signal reaching the aircraft as it flies through the satellites' spot beams.

The ViaSat satellite equipment is currently installed and flying on one trial Qantas Boeing 737-800 aircraft connected to the ViaSat/NBN test network. The full production internet system is expected to be switched on later this calendar year. The rest of the airline's domestic fleet of Boeing 737 and Airbus A330 aircraft is projected to be outfitted with the ViaSat equipment starting in 2017.

Nearly half of CEOs Have Begun Digital Business Transformation: Gartner



While the idea of shifting toward digital business was speculative for most CEOs a few years ago, it has become a reality for many in 2017, according to a recent survey of 388 CEOs by Gartner, Inc.

Forty-seven percent of CEOs are being challenged by the board of directors to make progress in digital business, and 56 percent said that their digital improvements have already improved profits. "CEO understanding of the benefits of a digital business strategy is improving," said Mark Raskino, vice president and Gartner Fellow.

"They are able to describe it more specifically. Although a significant number of CEOs still mention e-commerce or digital marketing, more of them align it to advanced business ideas, such as digital product and service innovation, the Internet of Things, or digital platforms and ecosystems."

CEOs have also progressed in their digital business endeavours. Twenty percent of CEOs are now taking a "digital-first" approach to business change.

"This might mean, for example, creating the first version of a new business process or in the form of a mobile app," said Mr. Raskino.

"Twenty-two percent are taking digital to the core of their enterprise models. That's where the product, service and business model are being changed and the new digital capabilities that support those are becoming core competencies."

Although more CEOs have digital ambitions, the survey revealed that nearly half of CEOs have no digital transformation success metric. "For those who are quantifying progress, revenue is a top metric: Thirty-three percent of CEOs define and measure their digital revenue," said Mr. Raskino.

CEOs set the success criteria for digital business," added Mr. Raskino.

"It starts by remembering that you cannot scale what you do not quantify, and you cannot quantify what you do not define. You should also ask yourself: What is 'digital' for us? What kind of growth do we seek? What's the No. 1 metric and which KPIs must change?"

Gartner conducted a survey of 388 CEOs and senior business leaders in user organisations worldwide in the fourth quarter of 2016 to examine their business issues and some areas of IT technology agenda impact.

Most responding organizations were those with annual revenue of \$US1 billion.

ZircoDATA acquires Archivewise

ZircoDATA, provider of records and information management services across Australia, has confirmed the acquisition of Archivewise Records Storage based in Perth, Western Australia.

With the acquisition, ZircoDATA will assume responsibility for Archivewise's strong customer base, growing its presence in Western Australia. Terms of the deal were undisclosed.

"Archivewise is a strong business that delivers trusted and dependable services to organisations in Western Australia," said Dennis Barnedt, Executive Chairman, ZircoDATA.

"Archivewise succeeded in building a strong customer base with a great service reputation that will fit in well with our current operations. We are confident ZircoDATA will continue to provide secure, attentive records and information management services.

The acquisition bolsters ZircoDATA's position as a leading records management company in Western Australia"

"Acquisitions and new service offerings are key components of ZircoDATA's strategic focus to grow its business in Australia. The acquisition of Archivewise aligns with our objective for growing our presence in the Western Australia market," said Dennis Barnedt.

www.zircodata.com.au

Veritas, IBM join forces in the cloud

IBM and Veritas Technologies have announced a collaboration designed to help enterprises working with increasing data volumes better manage, optimise and protect data across hybrid cloud environments.

As part of the agreement, Veritas has certified the IBM Cloud Object Storage family of software and cloud services for use with Veritas NetBackup 8.0. As a result, both Veritas and IBM clients can gain a more efficient way to migrate data from on-premises systems to the cloud for greater storage capabilities and efficient management of their growing unstructured data. Based on IBM's acquisition of Cleversafe in 2015, IBM Cloud Object Storage brings advanced object storage technology to the cloud.

In addition, IBM has also certified NetBackup 8.0 to run on the IBM Cloud to offer clients additional data protection for cloud-based workloads. NetBackup 8.0 has an anticipated availability of 2Q17 and will be available for order from the IBM Bluemix Catalog of services. Through this model, customers will have the tools to rapidly provision or modify infrastructure more cost-effectively across the IBM Cloud.

The agreement also calls for joint go-to-market and support initiatives from both companies, designed to help customers accelerate their adoption of cloud services by leveraging the combined enterprise expertise of IBM and Veritas.

Clearlake acquires NetDocuments

US investment fund Clearlake Capital Group is to acquire NetDocument, the provider of secure cloud-based document management, email management, and collaboration solutions to law firms and corporate legal and compliance departments.

The Company will continue to be led by Matt Duncan, CEO, and Alvin Tedjamulia, CTO, who will both join the Board of Directors alongside Clearlake. Financial terms were not disclosed.

Founded in 1999, NetDocuments is currently used in more than 140 countries and by over 20 percent of Am Law 200 law firms, as well as numerous leading corporations and legal departments. NetDocuments plans to use the investment funds to accelerate growth organically by continuing to build on a successful product development and sales strategy, and also inorganically through acquisitions.

"We are eager to begin our partnership with Clearlake and continue building our next generation cloud platform" said Alvin Tedjamulia, CTO NetDocuments.



The Role of Process Automation in Business Transformation

By Dan Griffith

Organisations everywhere are facing disruption. We've entered full steam into the age of the customer; growing expectations, new digital capabilities and increasing demands from employees to have more flexibility in how they work require major changes in how enterprises run their businesses. The disruption for IT is great, but there are ways you can move forward without throwing away everything you've built so far.

In today's world, business transformation is digital transformation, and while technology may not be the principal driver of transformation, it plays a crucial role. This is why the role of Enterprise Architect is so critical to understanding and enabling business transformation.

Gartner defines business process automation as "...the automation of complex business processes and functions beyond conventional data manipulation and record-keeping activities, usually through the use of advanced technologies."

Simply stated, it is the automating of activities within business processes that are routine and repeatable, and don't require human intervention. This is sometimes called robotic process automation, or RPA. Through the automation of these routine activities, enterprises gain efficiencies and cost savings.

But this is only one component of the value process automation brings to business transformation.

Traditional approaches to BPM and process automation focused on creating standard automated workflows, but process automation also brings additional benefits to the organisation. It can:

- Increase data-centricity by connecting the internal and external applications and information necessary for employees to efficiently and effectively support customers.
- Serve as a starting point for incorporating new business practices, compliance rules, and other business regulations, as well as new technology.
- Increase and speed up collaboration among employees, partners, and other associates both within the office and on the road.
- Improve process visibility and traceability, supporting continuous improvement.

A few examples of process automation include automating the on-boarding of employees, customers and vendors; customer and employee self-service; sending out automated notifications to employees involved with high risk financial transactions and regular reporting to executives.

Re-imagining Process Automation

Traditional process automation is focused on eliminating variation and driving internal improvements often through the automating of as many tasks as possible. It took an inside-out approach that identified how the process needed to work to support the business itself.

Today, Gartner says that process automation focuses on

providing “freedom within a box.” It requires enterprises to rethink their idea of “process,” moving it from a back-office management tool to the front office where employees have the ability to dynamically adjust how a process, and its activities operate to meet the current situation. The focus now shifts from inside-out to outside-in and supporting the needs of the customer.

“The dynamics of digital business necessitate an enterprise’s most adaptable resource - its people - to easily consume systematised capabilities and the best information available in the moment to dynamically orchestrate their interactions with peers, customers, partners and so on. Process becomes less about automation and more about the dynamic orchestration of human, machine and information resource interactions to deliver an optimal outcome,” according to Gartner.

One way we see this evolution happening is in the creation of process-driven applications. Case management is an example of process automation that includes both automated and flexible, agile activities that adapt to the current situation and customer.

Incident management is a perfect example for this kind of automation. Identifying the existence of an issue is usually a very structured entry point, and the closure of the problem is also very well defined. But what happens in the middle is much more complex to envision and thereby harder to model in advance.

The right process platform will allow you to model the expected milestone (identification, assessment, resolving, confirming solution and closing) with the right service level agreement protocols in place. But it will also allow those in charge of executing the actual tasks to create new activities, collaborate and trigger new specialised processes as needed.

All this unpredicted activity leaves trails and results that will coexist with the information received from the pre-envisioned activities. Choosing to automate this process with the right platform should not be a decision between visibility and flexibility. Introducing process automation into your enterprise doesn’t mean you have to abandon existing IT investments.

Smart enterprise architects know that the best process automation strategy includes the right combination of people, processes, and technology. That right combination considers many factors such as current IT investments, integrations with internal and external systems as well as how and with whom employees need to collaborate to get their work done.

Process automation is not just about cost-savings. It’s about delivering long-term value through the consistent and efficient operation of business. It empowers IT to support the definition, automation, and integration of processes the best way possible.

Modernisation of legacy systems

Most enterprises have a number of legacy systems in house. Some are custom-coded applications, and others are complex mainframe systems. In many cases, these legacy applications support critical business activities.

Most of these systems can’t be easily replaced, either due to their use in the business or to the cost of replacement. However, their continued use challenges the enterprise architect’s ability to help the enterprise respond to changing business priorities quickly.

The amount of time and budget IT expends maintaining and supporting these legacy systems could be better spent elsewhere. IT resources are also frustrated because the time required to support legacy systems keeps them from working with innovative technologies that grow their skillsets.

Modernising legacy systems through “wrapping” them with an agile process layer and migrating the data to a less expensive records management platform takes a great burden off IT. It enables the Enterprise Architect to shift their attention and efforts to new digital technologies such as mobile, cloud and Big Data, lowers risk to the organisation and results in a more

cost-effective IT environment. This is where process automation can help.

Process automation is important to helping IT on-board new technologies. It can support the migration of records and information to less costly technologies. It can support the creation of processes that integrate existing systems and new systems, and it can enable employees to adopt new approaches to working, but still retain access to systems that contain key information.

Most organisations have dozens of processes that look like this: Receive an email. Get data from an application X. Copy information in a network available spreadsheet. Generate word document. Update system Y; etc. These kinds of processes are expensive, people dependant, error prone and huge bottlenecks to achieve strategic business objectives.

Some approach modernisation through process automation as a mechanism to provide more activity focused interfaces that leverage information available in different sources.

If workers collaborate in the context of “enabling service X for customer Y” rather than performing different transactions in their ERP, CRM and core systems, performance will improve. Process automation allows the operation to focus on business outcomes rather than putting together the support pieces.

Others see modernisation in providing completely new interfaces. Through process automation, customer-facing transactions can be exposed via a highly-efficient, tailored user interface. For example, an insurance company could provide a mobile website to allow customers to configure and quote their policies. All the rules, calculations and support transactions to enable such mobile experience are orchestrated by a process.

Working with core systems that often exist in black boxes causes particular changes. There is little to no visibility into how these systems work, the ability to change them as business needs change is difficult and time-intensive, and there’s often a lot of replication of data across systems that is not always in sync.

Today’s systems need to support cross-organisation collaboration as enterprises work to focus on the constantly changing demands of customers. Employees need the flexibility to change the way business processes work, empowering them to adapt to changing market conditions, new partners, and new compliance requirements.

Through the implementation of business process automation, IT can help create processes that automate routine, repetitive tasks, yet allow for the flexibility required to alter processes as needed. At the same time, the enterprise architect can help ensure that these processes are well governed and adhere to compliance rules and regulations.

Most organisations have dozens of processes that look like this: Receive an email. Get data from an application X. Copy information in a network available spreadsheet. Generate word document. Update system Y; etc...

These kinds of processes are expensive, people dependant, error prone and huge bottlenecks to achieve strategic business objectives. Through automation, the actual human intervention

(Continued over)

Overcoming the BPM stereotype

Traditional business process management was about defining business processes to the nth degree and then implementing standardised workflows that fit 99% of situations. It was all about efficiency and cost-savings. Today's approach to business process automation is much more flexible and agile, and brings many additional benefits to the business, including making employees more efficient and effective in their daily work. It also provides a number of benefits to IT.

"Front-office effectiveness and innovation are enhanced when CIOs and digital workplace leaders enable workers to situationally adapt their tasks, interactions, information needs and decisions in the "business moment" to deliver an optimal outcome." (from Gartner The Future of BPM: From Prescribed Actions to Improvisational Interactions)

Time to market is critical. The competition in many markets is fierce, and the most successful companies are those that recognise and make changes, and get them out to the market as quickly as possible. At the same time, it's important to maintain consistency in how work is done. Consistency ensures that every customer is treated equally, not in the sense that the process is identical, but in the sense that they are listened to and supported to the best of the company's ability. Consistency through process automation also ensures each process is conducted in a controlled manner, following corporate norms and best practices. Business processes also need to continue to be efficient. By automating repeatable, routine tasks where appropriate and ensuring employees have the tools and information they need at their fingertips to get their work done, process automation provides the best of both worlds.

No single system supports all the needs of a business or a single business process. Unfortunately, in many instances, employees spend significant time going from system to system to get the information they need to do their jobs. In some cases, they also need to access external systems or resources. Employees are forced to rely on outdated, time consuming methods of collaboration that delay their work and the outcome.

Process automation can provide the connectivity needed to bring together all the external and internal systems required to perform a particular business process. This connectivity

gives employees one place to access the information and tools needed, while still performing proper security and auditing.

Visibility, transparency, and traceability go hand in hand with successful process automation. The right automation platform provides the tools necessary to get full visibility into all the activities in a business process.

Analytics improve process visibility through consistent monitoring and reporting of all process activities not just when the process is complete, but throughout the period the process is performed. Most business processes involve more than one person working on a variety of activities. This makes it critical to ensure all activities are traceable back to the person or system that did the work, as well as what exactly was done.

The key is to ensure that the right people can see the right information when they need it and the system tracks when and how activities are conducted.

You can't set and forget a business process. Changing markets, increasing customer demands, changes to compliance rules and regulations (internally and externally) and many other factors force enterprises to continually monitor and improve how processes work.

This approach of continuous improvement can happen when business process automation is implemented strategically and with the right tools. The right process automation platform helps enterprises introduce agile and adaptive approaches to deal with changing and complex business and market conditions and at the same time ensure the following of compliance rules, both internal and external.

Process automation is certainly about lowering costs. Automating activities within a process where it is feasible ensures that routine work is done efficiently and reliably, reducing risks and removing the possibility of human error.

It also empowers business and IT to focus their attention on more important aspects of the process, such as integrating new innovative technologies and systems, adapting and enhancing critical activities and improving collaboration between employees and partners.

Ultimately, it's about ensuring customers are getting the ongoing support they need when they need it. Customer loyalty and retention are critical to higher profit growth.

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could be reduced to a check to see if things are working as expected and the capacity to intervene if something is off the rails or extra activities are needed for any special case.

Business success today is directly related to an enterprise's agility. How quickly and easily can it adapt to changes? The speed at which new technologies are coming to market and the speed at which customers and employees are adopting them and demanding the products and services they use to support them is increasing every day. In addition, new regulations regularly surface that must be addressed.

To compete in this "age of the customer" requires agility, the ability to react quickly to customer needs, new internal and external drivers, new opportunities and challenges, and more. It requires the flexibility to change according to the situation and the customer. Process automation can help IT provide the agility and flexibility necessary yet in a controlled fashion, ensuring compliance is upheld and best practices are followed. It does this by automating the tasks that don't require direct employee

involvement and providing capabilities to adjust process activities to meet each situation. Process automation brings agility through different fronts. Firstly through low code development, which means less complexity. Business processes are complex enough so simplifying how you build them it is an important gain. Then, process automation doesn't create new things, it leverages what you have and allows you to augment this. Enterprises already have most of the transactional systems they need; process automation is about making them work together within a common objective in the most efficient way possible. Last but not least, a process platform will deliver a large number of your usual requirements out of the box which mean less things for the customers to be concerned about: security, audit trails, logging, reporting and system management are areas that only need minimal attention in terms of the effort allocated when using the right process platform.

Dan Griffith is Enterprise Sales Director at Evertteam, a specialist in Enterprise Content Management, Business Process Management, Archiving and Records Management. <http://www.evertteam.com>

New Senate count solution in 12 weeks

Changes to Senate voting at the 2016 Australian federal election substantially increased the complexity of the Senate count. Faced with a tight deadline before the double dissolution election on July 2, 2016, the AEC in partnership with Fuji Xerox Document Management Solutions was able to develop a new end-to-end solution involved scanning and image recognition technology in less than 12 weeks.

At the 2013 federal election, most people voted by marking a '1' above the line, next to the group of their choice. The group voting ticket determined the flow of preferences.

Previously, only preferences expressed below the line, about 4 per cent of votes, needed to be recorded and entered individually into the count system.

The changes to Senate voting in 2016 required voters to express group preferences (at least 1 to 6) above the line, or individual preferences (at least 1 to 12) below the line. Consequently, preferences had to be entered into the count system for 100 per cent of Senate ballot papers – whether the ballot paper was marked above or below the line.

New semi automated solution

To ensure a workable count solution for the 2016 election, the AEC developed two potential solutions in parallel: (1) a semi automated vote scanning and new counting system; and (2) an enhanced EasyCount solution, using the AEC's existing count application.

Developed in partnership with Fuji Xerox Document Management Solutions, the semi-automated process was considered more robust, efficient and technically superior, and was adopted for the 2016 federal election.

The solution involved scanning and image recognition technology to capture preferences which were then visually

validated by a human operator before being imported to the AEC EasyCount system for the distribution of preferences and declaration of results.

Each state and territory established a dedicated Central Senate Scrutiny (CSS) site in their capital city. At the CSS, batches of Senate ballot papers were scanned using Kodak i5650 scanning hardware and entered into the TIS eFlow imaging software.

Optical character recognition technology captured voter preferences, with manual verification by a human operator. Once each Senate ballot paper is digitised and the marks interpreted by TIS eFlow imaging software, any ballot paper with unknown preferences or unusual markings is referred to a human operator for verification of the marks on the ballot paper

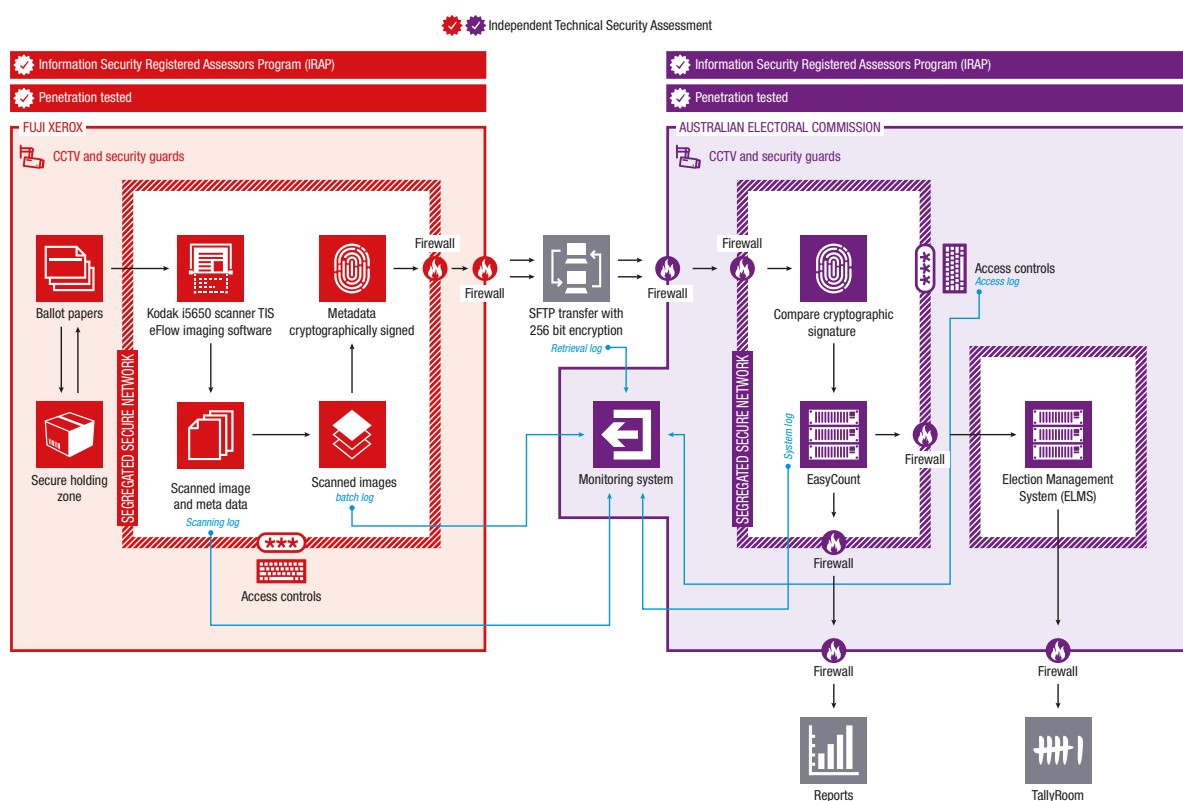
Once verified, a record, representing the preferences on the ballot paper, was generated and a cryptographic digital signature applied to protect each preference record from modification. The AEC then imported the preference record into the AEC EasyCount system for the distribution of preferences

Notable features of the solution included:

- a continual, trackable chain of custody for ballot papers
- human verification of every ballot paper
- full access for candidate scrutineers
- Best-practice IT architecture and security standards.

The counting solution required the movement of approximately 14 million ballot papers from over 7,000 polling places to a Central Senate Scrutiny (CSS) site in each state or territory. At these sites, over 800 staff scanned and verified preferences for 631 candidates. From Tuesday 5 July, eight CSS sites operated five days a week, over two shifts.

The AEC, with the assistance of the counting solution, successfully declared the eight state and territory senate results and returned the writs by 8 August 2016. The AEC is proud of its achievement given the short time provided in which to implement the changes.



Scanning and Security Technology developed for the 2016 Senate Election. Scrutineers may view the scanning, verification and adjudication processes. If they wish, they may raise challenges for adjudication by the Australian Electoral Officer (AEO).



What exactly the heck are Prescriptive Analytics?

By Mike Gaultieri, Forrester Research
Prescriptive analytics is about using data and analytics to improve decisions and therefore the effectiveness of actions. Isn't that what all analytics should be about? A hearty "yes" to that because, if analytics does not lead to more informed decisions and more effective actions, then why do it at all?

Many wrongly and incompletely define prescriptive analytics as the what comes after predictive analytics. Our research indicates that prescriptive analytics is not a specific type of analytics, but rather an umbrella term for many types of analytics that can improve decisions.

Think of the term "prescriptive" as the goal of all these analytics — to make more effective decisions — rather than a specific analytical technique. Forrester formally defines prescriptive analytics as:

"Any combination of analytics, math, experiments, simulation, and/or artificial intelligence used to improve the effectiveness of decisions made by humans or by decision logic embedded in applications."

Whether To Act (or not act)

Prescriptive analytics can be used in two ways:

- Inform decision logic with analytics. Decision logic needs data as an input to make the decision. The veracity and timeliness of data will insure that the decision logic will operate as expected. It doesn't matter if the decision logic is that of a person or embedded in an application — in both cases, prescriptive analytics provides the input to the process. Prescriptive analytics can be as simple as aggregate analytics about how much a customer spent on products last month or as sophisticated as a predictive model that predicts the next best offer to a customer. The decision logic may even include an optimization model to determine how much, if any, discount to offer to the customer.
- Evolve decision logic. Decision logic must evolve to improve or maintain its effectiveness. In some cases, decision logic itself may be flawed or degrade over time. Measuring and analysing

the effectiveness or ineffectiveness of enterprises decisions allows developers to refine or redo decision logic to make it even better. It can be as simple as marketing managers reviewing email conversion rates and adjusting the decision logic to target an additional audience. Alternatively, it can be as sophisticated as embedding a machine learning model in the decision logic for an email marketing campaign to automatically adjust what content is sent to target audiences.

8 Prescriptive Analytics Technologies

Because "prescriptive analytics" is a focused moniker for data and analytics that are specifically designed and used to improve the effectiveness of decision logic there are many technologies that enterprises can use to improve decisions:

- **Descriptive analytics.** Descriptive analytics enables analytics users within an enterprise to query data integrated from multiple applications to create reports, dashboards, or aggregated data that firms access through applications either directly or through APIs. Descriptive analytics can inform decision logic either with aggregate variables specific to customers or with historical data that has been integrated from multiple application systems. For example, a simple aggregate analytic of the current sales for the day can plug into pricing logic in other applications to raise or lower the price.
- **Predictive analytics.** Predictive analytics is about creating predictive models - models that can predict an outcome with a significant probability of accuracy. Data scientists can use a combination of techniques including statistical algorithms, machine learning, and forecasting to create predictive models. These models can either provide a variable that feeds into the decision logic or make a probabilistic decision themselves. For example, an application could use extensive decision logic to approve a loan based on many factors, including a credit risk variable — which a predictive model can derive.
- **Streaming analytics.** Streaming analytics detects events and patterns in real-time streams of data. Many enterprise decisions have to be made in an instant. Streaming analytics allows developers to define patterns in multiple streams of disparate live data sources. Streaming analytics can provide real-time

insights for decision logic or it can detect patterns in data that indicate that a decision has to be made. For example, streaming analytics could detect that a shipment will be late due to a breakdown or that a customer is shopping for motorcycle safety products because she has a pattern of clicking on motorcycle safety products such as helmets.

- **Search and knowledge discovery.** Information leads to insights, and insights lead to knowledge. That knowledge enables employees to become smarter about the decisions they make for the benefit of the enterprise. But developers can embed search technology in decision logic to find knowledge used to make decisions in large pools of unstructured big data. For example, search technology can bring back a list of options for an application that finds the nearest gas station or products that are most likely to pique a customer's interest.

- **Simulation.** Simulation imitates a real-world process or system over time using a computer model. Because digital simulation relies on a model of the real world, the usefulness and accuracy of simulation to improve decisions depends a lot on the fidelity of the model. Simulation has long been used in multiple industries to test new ideas or how modifications will affect an existing process or system. Firms use it in engineering to test the safety of infrastructure, as well as in manufacturing to test the safety, quality, and design of products. Simulation uses many analytical techniques. For example, financial services firms use Monte Carlo simulation to explore how unexpected events might affect the value of their investment portfolio so they can make decisions to mitigate risk.

- **Mathematical optimisation.** Mathematical optimisation is the process of finding the optimal solution to a problem that has numerically expressed constraints. For example, firms use optimisation to determine the best way to allocate advertising dollars to multiple outlets or to determine the best allocation of supply chain resources. The breadth of mathematical optimisation techniques is exceptional because such techniques originate from various mathematical disciplines, including linear and non-linear programming and integer programming.

- **Machine learning.** Don't think of machine learning as a singular approach to analysing data. There are dozens of specialized classes of machine learning algorithms that focus on specific problem domains. What makes machine learning algorithms unique is that they identify patterns or make predictions by analysing historical data that is representative of the domain. "Learning" means that the algorithms analyse sets of data to look for patterns and/or correlations that result in insights. Those insights can become deeper and more accurate as the algorithms analyse new data sets. The models created and continuously updated by machine learning can be used as input to decision logic or to improve the decision logic automatically.

- **Pragmatic AI.** AI can, at present, reasonably be considered the ultimate prescriptive analytics. Enterprises can use AI to program machines to continuously learn from new information, build knowledge, and then use that knowledge to make decisions and interact with people and/or other machines. We are still a long way from pure AI like the kind you see in sci-fi movies like *Ex Machina* or television series such as HBO's *Westworld*. However, the building blocks of AI comprise many of the other technologies we have mentioned here, including machine learning, and have value for prescriptive analytics.

Tie Analytics To Decisions

The bottomline: Enterprises must stop wasting time and money on unactionable analytics. These efforts don't matter if the resulting analytics don't lead to better insights and decisions that are specifically linked to measurable business outcomes.

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Infosys Nia makes big predictions

Infosys claims its new Artificial Intelligence (AI) platform, Nia, builds on a year of experience with 50+ clients of its first-generation AI platform, Infosys Mana, and its Robotic Process Automation (RPA) solution, AssistEdge.

Dr. Vishal Sikka, Chief Executive Officer, Infosys, said, "When we launched our knowledge-based AI platform Mana one year ago, we set out on our path of bringing knowledge, data and automation, together with our services to our clients as never before.

"We have seen tremendous adoption, and indeed, a massive embrace of Mana by our clients, particularly in leveraging Mana to improve service delivery and drive efficiencies and cost performance through automation. But we could clearly see that there was much more potential, an unlimited potential, in bringing AI to our clients' most sophisticated and complex business problems, as they work toward a vision of bringing technology to every aspect of their businesses.

"Nia, the next generation of our AI platform now takes our purposeful approach to AI, one in which technology serves to amplify people and empowers them to work in new ways, to new heights. When we bring this together with our unmatched ability to educate and train in AI techniques and emerging technologies, we now have the platform, the services and the skills, to deliver new unprecedented value to our clients."

Infosys says Nia converges the big data/analytics, machine learning, knowledge management, and cognitive automation capabilities of Mana; end-to-end RPA capabilities of AssistEdge; advanced, high-performance and scalable machine learning capabilities of Skytree; and optical character recognition (OCR), natural language processing (NLP) capabilities and infrastructure management services.

Infosys' first-generation AI platform was about IT, simplification, efficiency and cost. Capabilities included socialisation of organisational knowledge, deep analytics, service automation, automated incident root cause analysis and others.

The next generation platform, Infosys Nia, tackles business problems such as forecasting revenues, forecasting what products need to be built, understanding customer behaviour, deeply understanding the content of contracts and legal documents, understanding compliance, and fraud.

Infosys claims Nia can help clients solve a wide variety of business problems:

- improving order-to-cash process by creating a realtime risk profile to customise the collection strategy, expedite resolution of disputes, predict anomalies, prevent disputes, and enable better visibility and forecasting of cash flow to reduce days sales outstanding (DSO).

- create knowledge models of multiple, complex labour contracts with an on-demand, self-service conversational interface to operationalise the knowledge.

- create a customer genome based on internal & external data sources to help develop targeted messaging, identify upselling and cross-selling opportunities, offer personalised solutions, and improve customer satisfaction.

www.infosys.com



My Health Record: the resuscitation of e-health, or a data placebo?

By Matthew Swinn and Mark Weber, King & Wood Mallesons

Like a phoenix rising from its ashes (or perhaps a resuscitation scene from ER) the Personally Controlled Electronic Health Record (PCEHR) digital health system has been given new life under the new My Health Record platform (MyHR).

Launched in July 2012 as one of the foundations of the National e-Health Strategy, PCEHR failed to make a significant impact on digital health due to poor uptake by both consumers and the medical professions. In November 2013, the Australian Government commissioned a review of PCEHR by a panel of health and IT experts, which was completed in the record time of 6 weeks and released in May 2014 (PCEHR Review). Deloitte was then engaged to run the public consultation process, with their report being released in September 2014 (Deloitte Report).

In response to the PCEHR Review and the Deloitte Report, the Government announced a \$A485 million “rescue” package to “re-boot” the failed PCEHR. The cash injection would be used to trial an opt-out system, improve the user-friendliness and clinical utility of the platform, including to relaunch the platform under the new name of MyHealth Record, and to replace the responsible agency, the National E-Health Transition Authority, with the Australian Commission for e-Health (since changed to the Australian Digital Health Agency, or ADHA). The project has cost nearly \$A1 billion to date and is expected to cost at least another \$A500 million.

My Health Record is intended to provide a secure online summary of a patient's health information. It aims to facilitate improved medications management and care coordination, particularly for those in frequent contact with the health system. The patient has full autonomy over what goes into their MyHR portal. They also decide who is allowed to access their records.

One of MyHR's stated benefits is that a patient's important healthcare information will be available in one place online, easily accessible by authorised persons. This should result in better care in medical emergencies, and more generally by facilitating the dissemination of up-to-date information across the patient's contact points within the healthcare network. It also dispenses with the requirement for patients to remember their own medical history in great detail. It could mark the end of filling out lengthy forms in the waiting room.

The Government estimates that a fully functioning MyHR will save it \$A7 billion in direct costs and \$A2.5 billion a year on an ongoing basis.

Terminal failure of the PCEHR

PCEHR was launched in July 2012 as one of the pillars of the National E-Health Strategy developed by Deloitte in 2008. The aim of the PCEHR system was to contribute to the creation of a “platform for health information exchange across geographic and health sector boundaries.”

Despite being met with initial warmth by consumers, PCEHR failed. PCEHR was not being used by healthcare providers, leading to a drop off in demand, with registration plateauing at 2 million users. The medical profession all but abandoned PCEHR, claiming it was too hard to use in daily practice. Only 40,000 health records were ever uploaded to PCEHR, accounting for only 2% of registered users.

Accordingly, the PCEHR Review was commissioned by the then Minister for Health, Peter Dutton. The PCEHR Review looked at the failings of PCEHR and sought to determine whether there was still a place for an e-health record system.

The PCEHR Review highlighted the following issues with PCEHR:

- not enough patients registered to provide clinical value;
- not enough information in patient records to provide clinical value;
- poor integration with healthcare practices; and
- the PCEHR interface was not conducive to practical clinical use.

However, the PCEHR Review found that there was still a place for an e-health system and that it remains a critical part of Australia's future healthcare infrastructure. The PCEHR Review also suggested that fixing PCEHR's flaws would help realise its benefits for the healthcare industry.

Following the PCEHR Review, the Government commissioned the Deloitte Report which indicated strong consumer support for an e-health record system. PCEHR was rebranded as MyHR and injected with more capital.

Will I be automatically registered?

One of the reasons PCEHR failed was that it was designed as an opt-in system, with voluntary registration. The PCEHR Review found that healthcare providers were reluctant to use a system which only some patients were using. It recommended switching to an opt-out system to create an instant uptake of users. The PCEHR Review recognised that implementing an opt-out system was dependent on a sufficient amount of patient information being uploaded and the establishment of clear privacy and security standards.

The recommendation for the opt-out approach was met with serious privacy concerns. A number of Members of Parliament

took the view that such a substantial imposition on individual rights could only be justified if it advanced a legitimate public policy objective and that merely increasing My Health Record usage did not warrant such a step.

Despite those objections, the My Health Records (Opt-out Trials) Rule 2016 bill was passed to enable the implementation of the opt-out system on a trial basis. Rollout of a full opt-out scheme will hinge on the success of these trials. So far, trials have been implemented in parts of NSW and QLD. They have seen nearly 1 million users added to MyHR with only 1.9% opting out.

The government has allocated \$374.2 million in the 2017 federal budget towards expanding the MyHR system to a full opt-out model.

“This follows unanimous support at COAG [in late March] for a national rollout of My Health Record with every Australian to receive a record, or opt out if they choose to do so,” budget documents state.

Will your healthcare provider be using MyHR compatible software? There is nothing which compels healthcare providers to support MyHR and the Deloitte Report warned that any electronic health record system would suffer from a lack of interest by healthcare providers.

Of course, patients are largely free to choose their healthcare providers and the National Health Services Directory now displays a MyHR logo next to MyHR compatible healthcare providers, which makes it easier for patients to use MyHR with ease and confidence. However, it is unlikely that a large number of patients will value having a unified health record enough to elect to move away from a longstanding doctor–patient relationship just to enjoy the benefits of MyHR. Realistically the successful uptake of the program will require support from healthcare providers.

Some steps have been taken to encourage healthcare providers to transition to MyHR compatible software. The Practice Incentives Program, ePIP, makes payments (capped at \$A12,500 per quarter) to practices which meet certain eligibility requirements and usage targets. Those requirements include:

- using compliant software to access MyHR;
- applying to participate in MyHR;
- uploading a minimum number of shared health summaries to MyHR.

This program reflects a key recommendation of the PCEHR Review, namely the use of better incentives to encourage the medical profession to use the system.

Is a patient's record on MyHR reliable?

Not necessarily, and this is perhaps the key criticism of MyHR, and the main reason some commentators suggest that the system will ultimately fail.

A key function of MyHR is that the patient has complete autonomy over what health data gets uploaded to their health record and who is allowed to have access to that data. The patient also has the ability to remove items from view once they have been uploaded, no matter how significant the item is. As a result, MyHR cannot be relied on as a complete source of information. Accordingly, some corners of the medical profession say that acting on MyHR information presents clinical risk. The MyHR website itself says MyHR is not comprehensive and cannot replace official medical records held by healthcare providers. Healthcare providers cannot assume that a patient's MyHR is complete. Rather, it can only ever be treated as an “additional source of information”. A further issue for accuracy is the permitted use of pseudonyms. MyHR allows patients to register and upload information under a pseudonym in addition to using their real name. These accounts do not have to be merged. The AMA has criticised this level of patient control saying it is an impediment to reaching MyHR's potential. They

say that shared health records which contain predictable, core and unqualified clinical information are critical to the achievement of MyHR's key objective; that is, to create a reliable and universally accessible source of patient data in order to drive efficiency gains across the healthcare system.

A lack of confidence in MyHR by healthcare providers is ominous. The PCEHR Review highlighted this as one of PCEHR's main failings. The less that healthcare providers can rely on MyHR the less likely they are to use it.

Building a better MyHR platform

The PCEHR Review found that an electronic health record system requires a series of unified, integrated and extendable foundations to enable the government and private sector to provide appropriate software solutions to the industry. Poorly integrated software systems were highlighted as contributors to the failure of PCEHR.

The ADHA has published various resources for implementing and developing a better digital health platform. These include:

- ‘eHealth Foundations’ – basic technologies of unique identification, authentication and encryption to provide a safe and secure method of exchanging healthcare information;
- ‘My Health Record Developer’ – easily customised guides and resources for developers integrating digital health products into their platforms;
- ‘Implementation and Adoption’ – enhanced essential foundations and infrastructure required to enable a truly national MyHR system;
- ‘National Infrastructure’ – national approach to support private, national, state, and territory digital health reforms; and
- ‘eHealth Reference Platform’ – clinically validated technical simulator for digital health, with technical services and sample code supporting demonstration, training and development testing.

The full range of development resources published by the ADHA can be found at www.digitalhealth.gov.au/implementation-resources

Next steps for MyHR

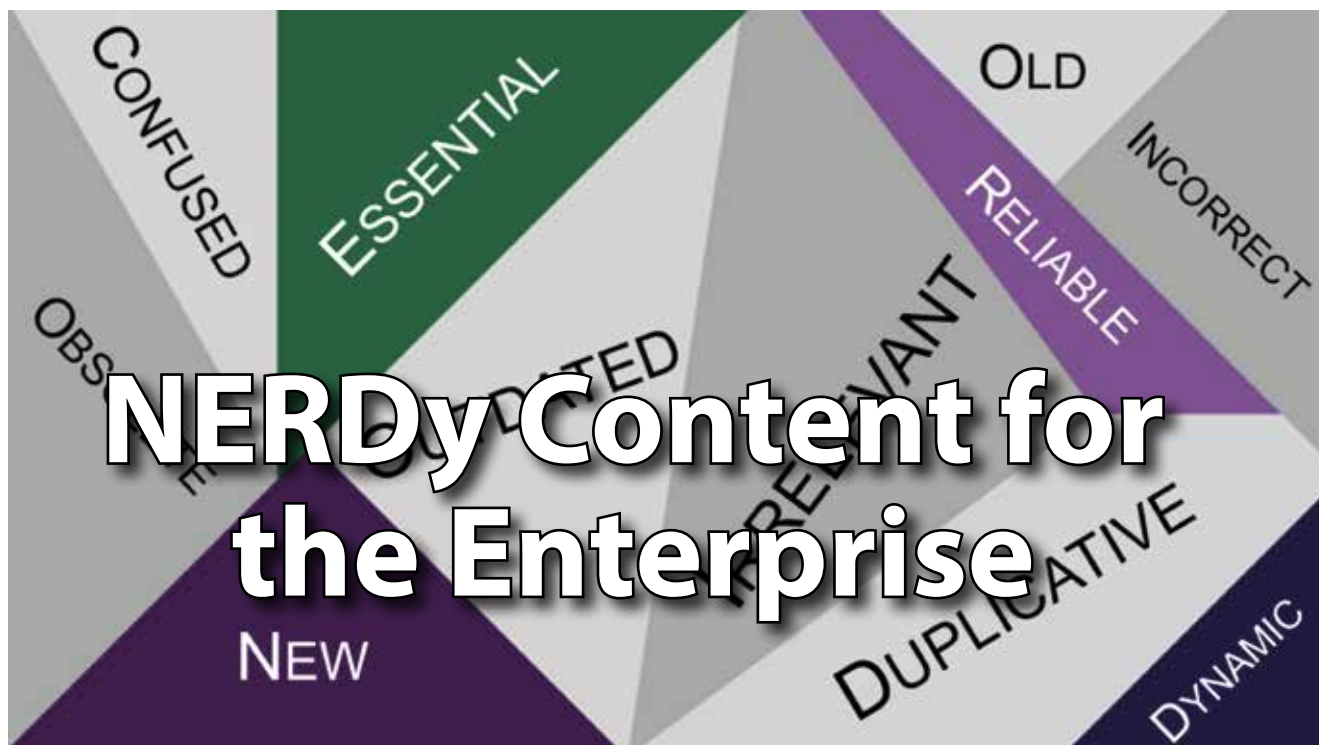
The ADHA has recently published MyHR statistics current to 12 March 2017. Approximately 4.6 million patients and 10,000 healthcare providers have now registered for MyHR. Almost 650,000 shared health summaries have been uploaded.

These numbers show an improvement in uptake from consumers. More significantly, they show increased usage by healthcare providers to levels never seen during the days of PCEHR. As the PCEHR Review found, without adoption by healthcare providers, consumer interest will wane.

ADHA CEO Tim Kelsey described the 2017 Consultation as an opportunity for the community to voice how it wants technology to interact with healthcare. The findings from the 2017 Consultation will be used to develop a national digital health strategy. The Productivity Commission's report (<http://www.pc.gov.au/inquiries/completed/data-access/report>) into Data Availability and Use highlights the health sector as particularly problematic in the context of data sharing and has suggested significant reforms to data and privacy laws in order to break the myriad silos that lock up our health data.

It is still too early to say whether MyHR will succeed where PCEHR failed. As a successful e-health system provides opportunities for software developers and healthcare providers alike to create better consumer offerings, this is an interesting space to watch throughout 2017 and beyond.

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By Zach Wahl

Over my years of consulting, I've had the opportunity to strategise, design, and conduct a number of content migration efforts. This is typically in the context of broader content management, document management, or knowledge base redesign or refresh efforts.

In many of these cases, the goal is for multiple legacy systems to be decommissioned, with the appropriate content migrated to the new system. Such efforts generally begin by conducting a content analysis, where, amongst other things, the location, amount, and utilisation of the legacy content is assessed.

Such content analyses often reveal a massive amount of legacy content, commonly measured in millions of documents. It is at this point where a combination of panic, malaise, and hopelessness hits some organisations. We can help you avoid this, however, with some core content migration best practices that can help you to prioritise your content, focus on highest value content, and clean your systems in the process.

EK's past effort have yielded a critical data point for content migration. On average, no more than 20-30% of an organisation's content is ever migrated to the new system. This is not to say the old content should be deleted (we can discuss records management another time), but simply that it doesn't need to be moved to a new system for one of several reasons. Typically, this is because:

Content is outdated or obsolete. A recent content analysis, for instance, found 47 versions of a single policy. Another found a floor plan for a building that had been sold a decade earlier. Yet another included the cafeteria "specials" menu for every day over the last twenty years.

Content is duplicate or near duplicate. Many legacy systems are full of iterated versions of documents that have since been finalised. For example, for a new client looking to migrate their document management system, we discovered they'd been holding over 100 different versions of a single marketing plan. This commonly occurs when an individual saves a document locally, and then uploads it as a fresh document instead of leveraging version control capabilities. In organizations that are consolidating from multiple systems to one, we also commonly see content duplicated across these legacy systems.

Content is simply incorrect. Going beyond the concept of outdated policies or old forms, many legacy systems include information that is plain wrong. In a recent effort for a web design company, their knowledge base still included a best practices document on designing for Internet Explorer 7 as the

gold standard. We also commonly find documents and directories that reference individuals who no longer work at the organisation and haven't for some time.

No one cares. Lastly, many organisations inevitably possess a great deal of content that users no longer care about. Meeting memos from years past, news about people no longer employed (or living), and sales plans for products that are no longer sold all fall into this category. The concept of a help desk knowledge base serves to paint the picture. If there's an answer to a question that no one has asked for a decade, it likely doesn't need to be in your production system.

This cleaning of content, eliminating the detritus accumulated over years, is not simple. However, if approached correctly, it will not only make your content migration effort exponentially easier, it will also improve your findability while minimizing the risk and liability associated with poor content management.

To guide these efforts, I created the acronym N.E.R.D. When faced with a daunting content migration effort, organisations should focus on that content which is:

- **New** – Simple sorting will reveal the newest version of documents and the latest thoughts from your experts.
- **Essential** – Company policies and legal restraints will guide that which is necessary for regulatory compliance and your business users can help to identify business critical information.
- **Reliable** – When faced with a myriad of old, outdated, and obsolete content, ensure you're migrating the "right" versions and leave the rest to the archives.
- **Dynamic** – Recognise the content that is fleeting, such as news, memos, and meeting minutes. The latest of these documents demonstrate dynamism and tend to be critical, but their value wanes quickly, as does their need to be migrated.

Basic user and system analytics can go a long way to helping you identify your NERDy content. Engagement with your end users, critical for a variety of other reasons as well in such an endeavour, can fill in the gaps.

As a result, your organisation will not only succeed in their content migration, they'll end up with a cleaner, tighter, and more trustworthy collection of content, and that will result in happier and more productive end users.

Zach Wahl is Principal, Knowledge Management and Taxonomy at Washington, US based consulting firm Enterprise Knowledge. Email him at zwahl@enterprise-knowledge.com

Structured Data classification tool

ClassiDocs has unveiled new functionality that enables the Classification of Structured Data Sets. In addition to existing support for hundreds of file formats for unstructured data, the classification of 'the other half' of every major enterprise's data set (structured data) completes the holistic view of data across the enterprise for IT administrators, Security Administrators, and Governance/Compliance officers.

"In addition to our recent release of Artificial Intelligence services for classification, we are leveraging that investment to apply the same policies and selection criteria for structured databases," stated IP Risk Control President Jason Remillard.

"We can use the same policy and classification set - guided and trained by end users and data stewards directly - to classify data within major database vendors.

"This supplements every security and compliance program - classifying what kind of data is where and who has access to it. Customers can now correlate this information with their existing compliance and policy systems."

ClassiDocs is a Data Classification platform that enables End Users and Data Stewards to actively participate in the process of classifying data sets - in a user-friendly, efficient and quick process that generally requires little to no end user training or education. Unstructured data classification has been available from its initial release, and now the solution is augmented with support for structured data sets - across leading database vendors' technologies.

"By exposing this additional data to interested parties - systems, people and processes - we are opening a whole new realm of security posture information that may be used to make more intelligent and orchestrated security decisions. Add this to our existing SIEM integration and governance alert system that is built-in, you have a classification platform that supports the entire security ecosystem - and actively contributes to making existing investments less taxed, more reliable and most importantly - more accurate," continues Remillard.

The ability to classify data sets in myriad platforms - with an accurate and up-to-date classification system - is integral for any organisation (health care, financial services, manufacturing, government) with private, customer, or financial information to protect. ClassiDocs represents a departure from the regular approaches - with its focus on end-user adoption, simple and rapidly deployable architecture, and native integrations with leading SIEM, EndPoint Security and Governance and Compliance toolsets.

<http://www.classidocs.com>

RAVN Systems adds Google Search Appliance replacement

RAVN Systems, developers of Artificial Intelligence (AI), Search and Knowledge Management solutions, has announced the launch of their Google Search Appliance replacement programme.

Google will cease to support the Google Search Appliance

by the end of March 2019. Therefore, RAVN are offering existing Google Search Appliance customers a discount to upgrade to its solution: RAVN Connect Enterprise.

RAVN Connect Enterprise is based on RAVN's "Applied Cognitive Engine" ("ACE"), which offers capabilities that go far beyond merely searching for documents and web pages, including Machine Learning capabilities and automatic extraction of key data from the unstructured data under management.

It incorporates several new features that help organisations manage their documents and other unstructured data a lot more efficiently. A few of those capabilities are:

- Contextual guided search as you type
- Automatic classification using iterative Machine Learning techniques
- Deconstructing documents and contracts into their constituent parts, for instance creating Clause Libraries - letting users search for knowledge rather than merely documents
- Graph based searches - exploiting explicit and implicit links between knowledge objects both for exploratory purposes but also to enhance relevance (i.e. term frequency is not the only measure of relevance)

www.ravn.co.uk

Nuance enhances voice recognition

Nuance Communications has announced customisation and productivity enhancements for Dragon Professional Group and Dragon Legal Australian. Both solutions have been updated to include a next-generation speech engine leveraging Nuance's Deep Learning technology to deliver high-recognition accuracy with the ability to learn and adapt to a variety of accents and environments.

With optimisation for popular Microsoft Windows touchscreen PCs, mobile professionals and field workers can complete detailed documentation or reports, or fill out form-based templates, such as client intake forms, almost anywhere work takes them.

Dragon Professional Group, version 15 enables employees to create high-quality documents, spreadsheets, and presentations or fill form-based reports - which often include drop-down menus and the need to point and click - faster and more accurately, all by voice.

Dragon Legal Group Australian, version 15 is designed specifically for the Australian legal industry with a specialised legal vocabulary developed using a corpus of Australian legal documents.

Dragon Legal Group Australian enables the quick creation and formatting of case files, contracts, or briefs, and empowers solicitors and other legal professionals to streamline legal documentation turnaround times and reduce transcription costs, while freeing up support staff to concentrate on high-value, billable tasks.

In addition to enhancing Dragon Legal Group Australian, Nuance is releasing a Dragon Legal Individual Australian solution. "Dragon Legal Individual Australian will allow sole practitioners and smaller firms that don't need the enterprise features of Dragon Legal Group Australian to realise the productivity boost from the local legal vocabulary," said Derek Austin, Nuance's Dragon Business Manager, Asia Pacific.

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ABBYY technologies are licensed by world-leading hardware and software vendors to provide Image Pre-Processing, OCR, Data Capture and Format conversion capabilities for their products. ABBYY technologies and products, available on a number of platforms (mobile, desktop and server) and a variety of operating systems (Windows, Linux, Mac, iOS, Android, etc.), include FineReader, PDF Transformer, FlexiCapture, Recognition Server, Mobile Imaging SDK, Lingvo, and ABBYY Compeno-based Semantic technologies.

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Information Proficiency and Sigma Data specialises in Information Management Solutions, Technology and Services.

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Our team is made up of experienced and diverse industry certified professionals. We strive to build lasting relationships with our clients, providing continuous improvement and mature solutions which significantly improve your end-to-end business processes and outcomes.



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

This award winning technology has been developed by Outback Imaging, an Australian R&D 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, EzeScan provides the fastest most cost-effective method available to digitise business processes.

EzeScan solutions range from basic batch scanning with manual data entry to highly automated data capture, forms and invoice processing. EzeScan provides both centralised solutions for records professionals and decentralised business process digitisation for entire workgroups.

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.



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Our offices and products span the globe with over 250,000 users in 32 countries. Our clients are well known and respected global brands that rely on DocsCorp for their technology needs.

Our mission is to provide document professionals who use enterprise content management systems with integrated, easy-to-use software and services that extend document processing, review, manipulation and publishing workflows inside and outside their environment to drive business efficiency and to increase the value of their existing technology investment.

Our solutions include:

- contentCrawler intelligently assesses image-based documents in content repositories for batch conversion to text-searchable PDFs, making every document searchable and retrievable
- compareDocs delivers unparalleled levels of efficiency and accuracy in the document comparison process
- cleanDocs provides a high level of confidence that metadata is cleansed from confidential or sensitive documents before being sent externally.

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Designed for regulated industries, Objective's solutions extend governance across the spectrum of the modern digital workplace; underpinning information, processes and collaborative workspaces. Solutions vary from information, records and drawings management to business process automation; from collaborative authoring through to secure collaboration with external parties.

These solutions turn the burden of compliance, accountability and governance into business opportunities by maximising the value of content to deliver operational efficiency that translates into improved services, increased productivity and reduced risk and cost.

Objective solutions have been designed to remove the friction associated with traditional information management, delivering quick and easy access to accurate information across a variety of digital devices and business applications for a diverse range of customers ranging in size and complexity, from large government bodies to local councils and any other regulated organisation.

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The ever-increasing flood of data, and how we manage it, is one of the greatest opportunities facing businesses and governments in the 21st century. Kodak Alaris Information Management works with organizations from small offices to global enterprises, bringing together the best science, technology and partnerships so its clients can stay ahead of the curve. From our award-winning range of scanners and software to the best global customer service and support, we're here to help businesses transform data into a powerful competitive advantage.

To learn more, please visit www.kodakalaris.com/go/IMnews.

Kapish

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As a Tier 1 HPE Software Platinum Business Partner, Kapish aims to provide its customers with the best software, services and support for all versions of the Electronic Document and Records Management System, HP TRIM, HPE Records Manager (HPE RM) & HPE Content Manager (HPE CM). We help our customers overcome the everyday challenges associated with information governance and document/records management through software and services that improve the user experience and maximise return on investment. Focused exclusively on HPE RM / CM, our extensive range of software solutions are designed to easily integrate into existing systems or be implemented as new solutions, enable projects to be delivered faster, more effectively and with a higher degree of success. We work with our customers to improve their everyday use and experience with the system. Designed to bridge the gap between users and technology, our software solutions are easily integrated into existing systems or implemented as new solutions. Quite simply, our products for HPE RM/CM make record-keeping a breeze. Kapish is a member of The Citadel Group. Citadel solve complex problems and lower risk to our clients through our tailored advisory, implementation and managed services capabilities.

OPEX

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OPEX

OPEX 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.

Epson

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

Fujitsu Australia

Tel: 02 9776 4555
Email: Fujitsu.direct@au.fujitsu.com
Web: au.fujitsu.com/scanners

FUJITSU

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.

ELO Digital Office

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ELO
Digital Office

ELO Digital Office is a truly global ECM company with Australian expertise! With subsidiaries in 48 countries and hundreds of thousands of users, ELO has become the natural choice in ECM. An award winning ECM supplier, ELO has been consistently recognised for its comprehensive functionality, user friendly design, trend-setting innovation and open architecture. The Australasian HQ of ELO was established in 2005 and has gained an impeccable reputation on all levels of Government, the Private Sector, NGOs and Not-for-Profit Organisations.

The completely scalable product allows ECM implementations from as little as five users to solutions for many thousand staff members. With reputable certified business partners such as Toshiba, Information Proficiency (WA), Infocentrik (NZ), AMS Imaging (Victoria), Jardine OneSolution (Hong Kong) and others, ELO customers are assured of quality implementations, successful rollouts and continued support - 24/7/365.

The VERS-compliant ELO product provides solutions for Document Management, Records Management, Workflow, Accounts Payable Automation, Imaging, Contract Management and mobile applications for all industries. ELO can be deployed onsite, in the cloud or as a hybrid solution.

Realtime recognition captures mobile screens on the fly



ABBYY is enabling 'instant' text extraction from the preview screen of mobile devices via a newly introduced Real-Time Recognition SDK (RTR SDK). Realtime recognition enables quicker, simpler extraction of text from documents and objects placed in the live video stream from smartphone and mobile cameras. The extracted data can be used in a variety of mobile applications ranging from highly responsive customer services to automated enterprise processes and consumer apps.

Applications based on ABBYY Real-Time Recognition SDK can pull text from on-screen objects and automatically convert it to digital data. On-screen images are processed in live video stream, eliminating the need to first take a photo and save it. This makes the data entry process simpler and more intuitive. The conversion takes place directly on the device and within the mobile app, no Internet connection is needed. Once digital, data can be easily processed by the application or even sent to cloud-based systems for further handling.

Enterprises can develop real-time recognition-enabled customer services and products to speed up data acquisition and processing times. As part of customer onboarding processes such as account opening or loan application, information from ID cards, pay slips and other documents can be captured within seconds and then transferred directly into online forms or apps for new customer sign-ups.

For customer self-services provided by banks or insurance companies, mobile apps can quickly extract and use transactional information such as bank transfer details (BPay, SWIFT, IBAN, etc.) or policy numbers in claim forms to make data entry processes more efficient. As no photos are stored on the device, the technology is well-suited for use in processes that must comply with data security and data privacy standards.

Software vendors developing consumer apps can easily add new functionality and value for their users. Travel apps can offer fast translation assistance when images captured on preview screens can be quickly translated using mobile dictionaries.

Text reading apps for persons with reading and learning disabilities can be enhanced by 'live text input' into their text-to-speech components.

ABBYY Real-Time Recognition SDK is available for integration into new or existing applications for iOS and Android. The ABBYY developer toolkit supports easy integration and offers code samples and 'quick start' guides to help developers get started. The SDK supports capture of texts in 63 languages.

A video illustration of the solution is available at <http://bit.ly/RTRSDK>. For more information on the ABBYY Real-Time Recognition SDK or to request a trial for developers, visit the ABBYY website (www.abbyy.com/en/real-time-recognition-sdk).

Fuji Xerox Smart Work Gateway

Fuji Xerox Australia has announced the launch of its Smart Work Gateway concept designed to support businesses with more flexibility and secure mobile working. Smart Work Gateway offers businesses the ability to connect directly with popular cloud service providers, simplified device management and access to new productivity apps.

To support the Smart Work Gateway concept, Fuji Xerox Australia also introduced 12 models of cloud-friendly, digital colour MFDs under its ApeosPort-VI C series.

The new ApeosPort-VI C series integrate Cloud Service Hub – a new platform that links the multifunction devices with multiple de facto standard cloud services.

Users can log into the cloud services with a single sign-on, search across these services for documents as well as the ability to scan, save and print from the cloud.

A Direct Management Console enables users to purchase, download and install apps for multifunction devices from the internet in a centralised manner. This allows multiple multifunction devices to be simultaneously managed and configured, providing rapid adaptation in the event of sudden changes in working processes, creating a more nimble and agile working environment.

Additional features such as Digital Rights Management (available at a later date), Near-Field Communications (NFC) printing integration (Android devices) and DocuWorks Digital Signatures give an additional level of document control and security. The high-end ApeosPort-VI C series models have improved scanning productivity, achieving 270 pages of duplex scanning per minute. Bulk scanning of large volume documents can be efficiently done as the new multifunction devices scan the front and back of double sided documents in a single scan.

Kofax enhances ReadSoft Online R9

Kofax has announced the availability of ReadSoft Online TM R9, a cloud-based capture and invoice processing solution.

ReadSoft Online automates the accounts payable process by capturing invoices, extracting invoice data and exporting verified data to ERP, accounting and other applications. Built on Microsoft Azure, its setup is quick and does not require IT resources.

Key enhancements with this release include:

A new HTML5 interface offering an intuitive screen presentation that makes it easier for developers to generate interface improvements with little or no training.

Upgraded capture capabilities with enhanced line item extraction, learning and optimisation to readily identify country specific invoices, improved custom extraction fields and enhanced auto learning. Improved reporting for better extraction of key analytical data and access to reports using Microsoft Excel. Increased partner channel autonomy with simple integration to applications through easy-to-use APIs and XML outputs.

ReadSoft Online R9 builds on previously released features including multi-language support, line item extraction, supplier recognition and Excel import for master and purchase order data and reporting. As a cloud-based solution, updates and enhancements are deployed in an automated manner allowing customers to access new features as they are incorporated into the product.

MediaValet DAM locks into SharePoint

MediaValet Inc. a provider of cloud-based digital asset management (DAM) software, has announced integration that allows SharePoint users to view, manipulate and share all popular formats and sizes of photos, videos, audio files, graphics,

animations and 2D and 3D CAD files within the platform.

Microsoft launched SharePoint in 2001 to address organisations' fundamental need to store and manage documents in a central, secure location. Today, over 200,000 organizations around the world rely on SharePoint as their company-wide intranet.

MediaValet's integration with SharePoint allows organisations to add high resolution, large format, rich media, 2D and 3D files to SharePoint, view and manipulate them in full resolution, and download or share them in all popular formats or sizes.

Rendering is delivered on demand by MediaValet, along with version control and rights management.

MediaValet's recent launch of its 3D AutoCAD viewer further enhances the SharePoint integration by enabling all users to view and manipulate detailed industrial design, engineering and architectural files on their corporate intranets. Manipulation of 3D models includes the ability to rotate, zoom, explode, slice and do walk-throughs.

www.mediavalet.com

eSignLive now on the AppExchange

eSignLive for Salesforce CPQ is now available on the Salesforce AppExchange, providing an easy-to-integrate app which digitises the configure-price-quote (CPQ) process by bringing e-signing capabilities to sales quotes, proposals and agreements directly from Salesforce CPQ.

eSignLive for Salesforce CPQ enhances the deal closing process by making it easy to sign documents quickly and securely on any device, eliminating the need to use paper for a signature. Organisations can generate quotes and configure orders from within Salesforce, and then with one click, push the documents for signature.

eSignLive for Salesforce CPQ helps keep the entire quote-to-cash process digital and eliminates hybrid paper-digital processes.

Digitising the sales contracting process can add value across the organisation:

- Sales departments benefit from a completely digital process that lets them focus on closing deals rather than chasing approvals or paperwork.
- Customers gain the ability to conveniently sign anywhere, any time and on any device.
- Operations and Finance benefit from fully digital invoicing, reporting and other post-sales activities triggered automatically from Salesforce.
- Compliance receives e-signed documents and subsequent audit trails that are stored back into Salesforce once the transaction is complete, including transaction history like how and when the transaction took place.

<http://sforce.co/2mOSXxr>

Listen to voice of the employee (VOE)

Lexalytics, a provider of cloud and on-premise text analytics solutions, has announced its HR Industry Pack, which uses text analytics to improve corporate human resources (HR) operations and voice of the employee (VOE) programs.

The HR Industry Pack uses Lexalytics' machine learning and artificial intelligence technologies to analyse company reviews, internal company emails, message boards, employee surveys and other workplace data. With the resulting insight into employee sentiment about the organisation, management teams can design programs to improve retention, productivity and satisfaction.

The HR Industry Pack includes 185 categories specific to employee content; around concepts like benefits, discrimination, ethics and managerial quality.

These categories allow companies to reduce overall risk by catching problems as early as possible, and help them to keep

the high performers happy.

The pack also includes more than 2,000 sentiment phrases drawn from genuine employee feedback, such as "toxic environment" and "treated equal". In a test of over 2,000 documents, the Lexalytics HR Industry Pack achieved 82 per cent overall agreement with human annotators, reaching the gold standard at which humans agree of ~80%.

<https://www.lexalytics.com>

Free Document Approval for iManage

Office Information Australia (OIA), a provider of Content Services and Workflow Management in the APAC region, has announced an offer which allows iManage customers to implement a Workflow system with a Document Approval workflow for free.

Workflow and Business Process Management has long been considered only appropriate for larger companies and businesses in the Manufacturing and Engineering space.

Acknowledging that the need for workflow stretches beyond these traditional markets and that the paper-intensive, OIA is offering a free version of the Enterprise class WorkflowGen from Advantys, together with a free 'Document Approval' workflow integrated directly with the iManage DMS.

"We have seen process automation move across in recent times from our manufacturing and Engineering clients into the compliance and process-sensitive areas of larger professional offices", says Nigel Askew, a Director at OIA.

"Some of these have been maturing Lotus and SharePoint customers wanting to convert existing serial forms into more process-driven business objects, while others are clearly aiming at the policy enforcement end of the spectrum".

WorkflowGen is a full function workflow creation tool that offers the creation of Forms and Business Rules without the need for programming. OIA's WorkflowGen based Document Approval for iManage provides users with an easy right-click option from their usual iManage Work interface (DeskSite or FileSite), allows them to select deadlines, reviewers and provide instructions before sending the workflow on its way.

www.officeinfo.com.au

DocsCorp apps verified as Citrix Ready

DocsCorp products compareDocs, cleanDocs, and pdfDocs have been verified as Citrix Ready. The Citrix Ready program helps users identify third-party solutions that are recommended to enhance virtualisation, networking and cloud computing solutions from Citrix.

These products are now listed in the Citrix Ready Marketplace, which hosts over 30,000 verifications plus an extensive list of verified products and solutions compatible with a range of Citrix products. The DocsCorp products have successfully passed a series of tests established by Citrix, and can be trusted to work effectively with Citrix Cloud XenApp and XenDesktop Service on Azure.

While DocsCorp products have been designed from the outset to be compatible with XenApp and XenDesktop, they are now verified for use in Citrix environments – notably compareDocs, its document comparison application, and cleanDocs, its meta-data removal software.

cleanDocs for desktop and mobile users is a breakthrough technology that delivers on speed, flexibility and control to protect against accidental information and metadata leaks. compareDocs uses leading-edge technology to compare and analyse the difference between two documents with incredible accuracy across all document types. pdfDocs for PDF creation and editing integrates with business systems to deliver higher levels of efficiency and productivity when assembling, securing and distributing business-critical documents in PDF and PDF/A.

www.docscorp.com

Records compliance tool goes online

Information Enterprises Australia has made available online the Australian Record Retention Manual (ARRM) online, a tool for information retention compliance across the private sector

"We have been listening to our clients and have spent time researching the best way to take this extensive resource into the online environment," said Shirley Cowcher, Managing Director of Information Enterprises Australia.

"The last print edition of the ARRM was our 16th edition and it totalled 952 pages and referenced more than 1700 pieces of Australian legislation. When a reference tool gets to that size, and with legislative change occurring as rapidly as it is, you have to look for methods of access that will provide ease and currency" Shirley said.

ARRM Online launched on 3rd April 2017 as an online subscription service. It is the same authoritative tool providing in-depth interpretation of Australian acts and regulations. Subscribers will get instant access to guidance on reducing information risk and improving compliance.

Legislation can be searched by title, subject and jurisdiction. ARRM online is the one-stop-solution to learning all about what information your organisation needs to keep, the length of time it should be kept and the penalty for not doing so. Subscriptions are annual and available as a single user or a five-user licence.

www.iea.com.au

Formitize launches OCR Digital Division

Formitize, an Australian developer of paperless mobile form and data collection solutions, is launching a new dedicated Digital Division focussed directly on OCR Capture, Paper & Invoice Processing. Formitize has historically focussed on 'formitizing' a client's existing internal business forms and workflows.

The main focus has been in the mobile environment with the aim of converting paper forms to smart, paperless forms with automated workflows to help businesses run more efficiently and remove all the issues associated with existing paper forms.

The new Digital Division is focussed on documents coming into the business from external sources such as suppliers and getting them paperless too! . This includes a wide variety of cases including Application Forms, Delivery Notes, Order Forms, Purchase Orders, Receipts, Paper Timesheets, Human Resource Documents, Questionnaires, Claim Forms, Agreements, Accounts Payable Invoices, or any other inbound paper documents that need to be processed.

Heading up the Digital Division in the Asia Pacific region is Anthony Smiljan and Luke Morgan while the US & Canadian regions are led by Bill Vowell and John Williams.

A Free Trial of the Formitize service is available at Formitize.com.

Hybrid Site creation in SharePoint 2013

Microsoft has announce organisations running on-premises SharePoint will be to direct user site creation requests to Office 365 services via a new SharePoint Server 2013 feature called "Hybrid Self-Service Site Creation."

The new capability is enabled following installation of this month's Public Update release for SharePoint 2013, according to an announcement by Bill Baer, senior product marketing manager for SharePoint at Microsoft.

New with the March 2017 Public Update for SharePoint Server 2013 is the option to Create Site Collections in SharePoint Online.

"When selecting this option any hybrid user that goes to the Self-service Site Creation page (/_layouts/15/scsignup.aspx) will be redirected to SharePoint Online Group creation, and will be able to create a Group and associated Team Site in the Cloud using the new modern group creation flow," notes Baer.

"Hybrid users are defined through inclusion in one or more audiences as configured when enabling the hybrid sites feature in SharePoint Server 2013.

"This new hybrid capability allows administrators of SharePoint Server 2013 to have the option to enable their existing or new Self-Service Site Creation flow redirect users to SharePoint Online to create a Group (with an associated Team Site)."

There is the ability to turn on or turn off Hybrid Self-Service Site creation using SharePoint 2013 Central Administration, Baer added.

Microsoft expects to make the hybrid self-service site creation option available SharePoint Server 2016 in the second half of 2017.

SharePoint Maven eases the pain of learning SharePoint

SharePoint Maven has developed a searchable Knowledge Base to help businesses and non-profits learn how to setup SharePoint's out-of-the box functionality with easy to follow, in-depth tutorials and affordable one-on-one or group training.

SharePoint was released back in 2001 to help Microsoft's customers facilitate employee collaboration, improve document management and make better-informed decisions.

The software enables users to easily create portals, team collaboration sites, and searchable document libraries. Millions of people use SharePoint. However, many of these users work for Fortune 500 companies with sizeable IT departments that have in-house SharePoint experts—a luxury that small to mid-size businesses can't afford.

SharePoint Maven's highly searchable Knowledge Base includes step-by-step directions and numerous screenshots - making it possible for even a tech newbie to configure SharePoint for their needs. Users can search by category, tags or keywords. If they need more help, they can hire SharePoint Maven to provide affordable, just-in-time training. Or simpler yet, hire SharePoint Maven to create a custom SharePoint solution.

To explore SharePoint Maven's Knowledge Base, visit <http://sharepointmaven.com/blog-sharepoint-best-practices/>

Secure filesharing as a service (SFAS)

Australian hosting provider CloudRecover and the American security platform vendor FinalCode have announced a new partnership to offer Final Code's secure file sharing solutions across a number of applications.

As a Managed services provider, CloudRecover is also now able to deliver FinalCode as a service.

Headquartered in San Jose, California, FinalCode provides easy to deploy data protection solutions designed to enable businesses to securely share documents and data with external parties.

The FinalCode solutions have been designed by a team of cyber security experts and are suitable for organisations of all sizes, commercial, enterprise or government agencies.

Their file security solution enables businesses to easily protect shared sensitive information both within and outside their organisation, including:

- Enterprise-grade encryption
- Granular file permissions to give organisations full control over their data – no matter where they are
- Control over files even after they have been shared, with the ability to modify or revoke access at any time.

FinalCode's solution addresses the needs of data security across multiple devices. It reduces data leakage risk and keeps data safe from hackers, malware and unintentional mishandling.

FinalCode integrates with all popular applications.

Fujitsu debuts two new A3 scanners



Fujitsu has announced the availability in Australia and New Zealand of two new A3-capable document scanners: the fi-7700 (pictured above) and fi-7600.

The new models are able to capture documents up to A3 size in a wide variety of paper weights in one batch, saving time and cost for production-level scanning in a professional environment.

The fi-7700 model combines ADF (Automatic Document Feeder) and flatbed functionality with the ability to simplify loading documents by adjusting the rotating ADF to suit the users' office or workspace environment.

The fi-7700's straight paper path allows for very thick materials to be processed, while the flatbed is suitable for scanning fragile or oversized documents like magazines.

The straight paper path assures reliable scanning of mixed batches, regardless of the condition and type of document.

A one-touch change to non-separation mode allows for hassle-free scanning of folded or multi-layered documents.

Freely adjustable document side guides in the document feeder and effective stacker side guides minimise operator intervention before and after scanning.

The skew reducer improves the feeding performance and ensures that a single skewed sheet in a batch does not skew any following sheets.

Paper protection functionality detects acoustic and document length irregularities, thus minimising the risk of document damage even for documents as thin as 20g/m².

The fi-7600 model comes with dual fold-out operating panels to support left-to-right and right-to-left scanning scenarios. A wider variety of document qualities, materials, shapes and sizes can be scanned without special settings or operator interaction.

The fi-7700/ fi-7600 scanners achieve scanning speeds of 100ppm/200ipm (A4 landscape, colour, 200/300 dpi) and are optimised for centralised scanning of up to 30,000 documents per day.

The compact size of the scanners allows for placement in production and department settings. The scanners are designed for mixed batch capture application in the public sector, financial services and healthcare industries, as well as Business Process Outsourcing (BPO) service providers and scanning service bureaus.

Each model is supplied with PaperStream software for high clarity image processing, routine automation and document routing:

PaperStream Capture professionalises scanning routine automation. Patch code, barcode, matrix code and zonal OCR allow for routing and document augmentation on the fly.

PaperStream IP automatically produces high quality images for subsequent processing.

<http://blog.au.fujitsu.com>

SharePoint analytics for SMBs

Intlock, developer of CardioLog Analytics, has releases a SaaS reporting package for SMBs (Small to Medium size businesses)

The service-based solution offers sophisticated reporting integrated with Power BI and coupled with optimisation and engagement tools.

CardioLog Analytics SaaS is available with a variety of premade reports, enabling users to immediately understand their portal adoption levels, scope of content, and how well a search schema is working.

It aims to provide SMBs with a holistic toolbox to address overall portal challenges by monitoring engagement levels, portal resources, internal collaboration, productivity, adoption and more. CardioLog SaaS promises small and medium-size business the tools necessary to create, measure, understand and optimise SharePoint.

As a service-based solution, there is no need to install any software or deploy any complicated IT configurations, and users can execute strategies without waiting on prolonged development execution times.

For more info on SaaS Analytics for SMBs, contact [info\(at\)intlock\(dot\)com](mailto:info(at)intlock(dot)com)

veraPDF 1.0 ships, testing begins

The veraPDF consortium has announced the release of veraPDF 1.0, an open-source industry-supported PDF/A validator.

Led by the Open Preservation Foundation and the PDF Association, veraPDF validates all parts and conformance levels of ISO 19005 (PDF/A). The software is available under a MPLv2+/GLPV3+ license.

The 1.0 release is required by PREFORMA in order to initiate Phase 3 testing and acceptance, which runs from February 1 – July 30, 2017. Users are strongly encouraged to report bugs or other concerns to the project's GitHub issue tracker: <https://github.com/veraPDF/veraPDF-library/issues>.

Commenting on the release of version 1.0, Carl Wilson, Technical Lead for the Open Preservation Foundation said: "Identifying a file's format and establishing that it conforms to the format specification is an essential step for memory institutions with responsibilities for long term preservation and access. veraPDF helps users to evaluate their files against the standard.

"A PDF feature reporter and a customisable policy checker allows organisations to enforce institutional policy beyond the scope of PDF/A."

Duff Johnson, Executive Director for the PDF Association said: "The release of veraPDF 1.0 is a significant milestone for both the PDF industry and the digital preservation community. For the PDF industry, the project to develop veraPDF facilitated the identification and resolution of ambiguities in the PDF/A specification, improving interoperability and utility to end users.

"For the digital preservation community, veraPDF delivers authoritative information about the nature and long-term reliability of digital holdings while providing more tools to help preservationists advise contributors on their software and workflows."

"We hope to see users and industry performing large-scale testing of the software to help us find remaining bugs and make necessary and/or desirable enhancements within the PREFORMA-contracted period.

The PDF Association is preparing a Technical Note highlighting the ambiguities uncovered during development of veraPDF, and their corresponding resolutions. The organisation plans to publish TechNote 0010 in Q1 of 2017.

veraPDF now enters its contracted acceptance testing phase, which runs until July 2017.

Dynamics 365 vs. SharePoint

By Steve Mordue

Many of you may wonder why I would title this “Dynamics 365 vs. SharePoint”, as though it were an either/or decision. But many customers, particularly in the SMB space, seem to grapple with “deciding” between the two.

If I worked at it long enough, I could probably remove a screw with a pair of pliers. Granted, a screwdriver would clearly do a much better job, but what if a screwdriver cost way more than a pair of pliers?

I might be tempted to stick with the pliers. I know that by using pliers, removing a screw will take me about 20 minutes, and a screwdriver would take seconds, but I count my pennies. The time that me and my team spend using pliers for this? Hmm, yes, I guess there is that.

I am trying very hard to avoid the cliché of “Using the Right Tool for the Job” here, but it is unavoidable. I am assuming, and the evidence is clear, that many customers do not really understand the differences between Dynamics 365 and SharePoint. What they do understand, is that SharePoint came with their Office 365 Subscription and is already sitting there, while Dynamics 365 requires an additional purchase.

Fair enough, I have said in the past, that customers don’t look for reasons to spend more, but rather look for reasons not to spend less. The problem comes from focusing on one metric of cost: the subscription. In reality, the subscription cost is the lowest cost factor, not just “over time”, but from day one.

SharePoint is Awesome!

I am not a SharePoint expert. While we know all about how to integrate SharePoint with Dynamics 365, that is coming from the Dynamics 365 side.

As a Microsoft Certified Partner, we get all of these tools for free, so I am neither reluctant to use something because of

cost, nor do I feel obligated to make use of something because I am paying for it. So, I get that my perspective might be skewed, but we use SharePoint all day long.

In fact, I am not sure how we could even function without it. All of our client documents sit in SharePoint libraries that are synchronised with everyone’s devices, as well as the related Dynamics 365 records. While this is crucial to our business, it is also about the extent of our SharePoint use.

Like all things Microsoft, we are making use of about 10% of what SharePoint can do. For us, SharePoint is an extension of Dynamics 365.

SharePoint is no CRM

With all due respect to my SharePoint focused peers, SharePoint is no more a Customer Relationship Management platform, than Dynamics 365 is an Enterprise Collaboration platform. Tangerines and Bananas (Avoiding “Apples and Oranges” cliché). Attempting to turn SharePoint into a CRM is a pointless exercise. Development and customization costs are similar for both platforms, so why would you want to spend so much of that on replicating another product’s features... into either platform? The work has already been done. It would take an absurd amount of money to make either of these platforms provide even a fraction of what the other one does. What you would end up with, is a ridiculously customized “house of cards”, that is not going to be well supported by Microsoft, so you will be joined at the hip to your development partner. Your loyalty to a partner should be a result of their continuous efforts to satisfy your needs, not because you painted yourself into a corner with them.

Dynamics 365 is no Collaboration Platform

The same holds true for Dynamics 365. If you want to add collaboration capabilities, just connect it to SharePoint. Voilà, instant collaboration. While both products have awesome capabilities on their own, when combined, the net result is far more than the sum of its parts ... exponentially. Shift your focus from Cost to ROI, saving a few dollars, but generating little return for your investment, is actually not a good business strategy.

What provides the Best ROI?

You are probably expecting me to say “Get Everything”, but that is not always the case. Forget about costs and software for a moment, and instead think about outcomes that could lead to solving your business problems.

Too often I see customers looking at it the other way around, “Dynamics 365 looks really cool, what could it do for us?”. The more important question is “What do you need done?”

If you come with a clear understanding of your particular success inhibitors, the solution you need becomes obvious. Maybe it is SharePoint, maybe it is Dynamics 365, maybe it is both, maybe it is neither.

When you contact your Microsoft Partner, you should know ahead of time, exactly what outcomes you are looking for, then challenge them to explain, how whatever solution or combination they are suggesting, solves for those outcomes. In a perfect world, you will know what those outcomes are worth to you in dollars, and the ROI is simple math.

Steve Mordue, a Microsoft Dynamics MVP, is the CEO of Forceworks, a 2014 Microsoft Partner of the Year. <https://stevemordue.com>



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