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## Oxygen and DATUM target ANZ governance market

IT services company Oxygen, a subsidiary of DXC Technology, has been appointed exclusive reseller of DATUM's Information Value Management data governance platform to the enterprise market in Australia and New Zealand. Oxygen director, Stuart Dickinson, says digital transformation and data readiness have rapidly emerged as top priorities for large enterprises.

"The ability to consolidate and centrally govern data to ensure its quality and consistency across the organisation is a fundamental requirement of any transformation, and it is key to leveraging the advanced capabilities of S/4HANA, SAP's intelligent cloud ERP solution," says Dickinson.

"DATUM is a specialist information management company focused on solving business data complexity and recognised as a leader by Forrester and Gartner. Based on decades of experience and proven practices, DATUM has developed a data value management platform to help organisations define, manage and sustain a data operating model for ongoing information success.

<http://www.datumstrategy.com>

<http://www.uxcoxygen.com/contact>

## NuLegal acquired by global player in ediscovery and lit support

DTI, a global legal process outsourcing (LPO) company providing eDiscovery, management services, litigation support and court reporting, has acquired Australian firm NuLegal.

NuLegal has provided eDiscovery and eTrial solutions to the Australian market since 2010. Terms of the deal were not disclosed.

"Both DTI and NuLegal clients in the region will benefit from expanded technologies, enhanced project management, and a wider breadth of managed services and consulting expertise," said Charlotte Pache, managing director, Australia/New Zealand at DTI.

The combination promises to deliver more options to global and US clients requiring support throughout the Asia Pacific region, and foster an even stronger environment for secure and compliant cross-border data transactions.

"We are excited about joining the leader in the legal services

industry," said Mark de Bruyn, director at NuLegal.

"Our clients and employees will immediately benefit from being part of a global company and having access to resources that will allow us to scale in a way that other Australian providers cannot."

The entire NuLegal team will transition immediately to DTI. NuLegal will join DTI and Epiq Systems under their new brand name of "Epiq" in the first quarter of 2018.

## Microsoft announces SharePoint/Office 2019 release timetable

The first preview editions of SharePoint 2019 and Office 2019 are due out mid-2018, with both new editions of the venerable Microsoft products remaining available in on-premise server and desktop software editions.

The cloud does not rule entirely just yet, according to a blog post from Jared Spataro, general manager for Office, who said the "release, scheduled for the second half of 2018, will include perpetual versions of the Office apps (including Word, Excel, PowerPoint, and Outlook) and servers (including Exchange, SharePoint, and Skype for Business)."

"Office 2019 will add new user and IT capabilities for customers who aren't yet ready for the cloud. For example, new and improved inking features - like pressure sensitivity, tilt effects, and ink replay - will allow you to work more naturally.

"New formulas and charts will make data analysis for Excel more powerful. Visual animation features - like Morph and Zoom - will add polish to PowerPoint presentations. Server enhancements will include updates to IT manageability, usability, voice, and security." Said Spataro.

Microsoft has created a "completely revamped SharePoint Admin Center," which is expected to be available for "first-release" SharePoint Online testers in early 2018.

A new SharePoint Migration Tool is designed to move content (such as document libraries or file shares) from SharePoint Server sites located at an organisation's data centres to Microsoft's cloud-based SharePoint Online service or the OneDrive Office 365 service.

In other announcements at the Ignite event in Orlando, Microsoft plans to bring Skype for Business Online capabilities into Microsoft Teams, along with cognitive and data services, enhancing Teams as a hub for teamwork in Office 365, including persistent chat, voice and video.

New LinkedIn in Microsoft profile cards promise the ability to see information from LinkedIn profiles in Microsoft apps and services, initially Outlook Web Access, SharePoint and OneDrive for Business.

## ZircoDATA acquires NSW's Hunter Records Storage

ZircoDATA has confirmed their third Australian acquisition in the last 12 months, acquiring Hunter Records Storage based in Thornton, NSW, on 14 September 2017. By acquiring Hunter Records Storage, ZircoDATA enters the regional New South Wales market. Terms of the deal were undisclosed.

"We are delighted to welcome the customers of Hunter Records Storage to ZircoDATA and to continue the great track record of service excellence in Newcastle and the Hunter Region", explained Daniel Warren-Smith, Chief Commercial Officer, ZircoDATA.

"The Thornton facility is our 19th across Australia, and our first in regional New South Wales. This will be a springboard for us to grow our business in the Hunter Valley and throughout New South Wales."

[www.zircodata.com.au](http://www.zircodata.com.au)



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## Equifax adds data breach experience!

An Australian web site promoting the data breach solutions business unit of global credit reporting giant Equifax singles out the firm's "International breach solutions and experience". This boast certainly rings true after revelations that over half of the United States population may have had their personal details exposed by hackers in an historic data breach.

As many as 209 million Equifax customers could be affected by the cyberattack which is presumed to have taken place from mid-May through July 2017, and cybersecurity firms are still struggling to determine the extent of the damage.

The hackers accessed people's names, Social Security numbers, birth dates, addresses and, in some instances, driver's license numbers. They also stole credit card numbers for about 209,000 people and credit reporting dispute records with personal identifying information for about 182,000 people.

Although the vast majority of the breached data related to US citizens, an undisclosed number of UK and Canadian residents were also affected. There has so far been no reported impact on Australia and New Zealand.

Equifax acquired Veda, the leading provider of credit information and analysis in Australia and New Zealand, for \$US1.9 Billion in February 2016. Equifax operates or has investments in 24 countries in North America, Central and South America, Europe and the Asia Pacific region. The company, which last year reported revenue of \$US3.145 billion, holds data on more than 820 million consumers and more than 91 million businesses worldwide.

Equifax is blaming vulnerabilities in a "web application" for its massive breach. It failed to report the breach for 40 days and directed potential victims to a website that both requests even more personal information and promotes the company's own credit monitoring service.

A new report has uncovered that that an Equifax online employee tool used in Argentina could be accessed by typing "admin" as both a login and password. This gave access to records that included thousands of customers' national identity numbers. The Equifax Data Breach Solutions web site notes that "Data is breached every day. It is not only from theft or hacking but can occur from internal errors and failure to follow information handling procedures. It is not a matter of if, but when a data breach will occur."

"Equifax is able to help protect your customers in the event of a data breach. Our solutions can also be used as a precaution and be provided to staff to help protect your business.

"Data breaches can result in business disruption, lost revenue and customer trust. [Australian] Mandatory breach legislation passed in February 2017 means that serious data breaches now also need to be reported. The Commissioner has a range of powers depending on the nature and seriousness of the breach which can involve compensation and civil penalties."

US senators have called for a federal investigation and nearly 40 states have now joined a probe into the massive Equifax data breach. The US Federal Trade Commission has opened a probe into the debacle.

## Scandals drive Japanese government to revise document-shredding rules

Hit by influence scandals leading all the way to the prime minister, the Japanese government has launched a debate on revising how administrative documents should be managed.

The *Japan Times* reports the debate will focus on how much the government can limit the arbitrary discarding of administrative documents that ought to be kept — a point recently raised in the Diet (the Japanese Parliament) amid controversies revolving around such documents.

To tackle arbitrary document destruction, the government must consider ways to reduce the number of documents kept for less than a year, which government agencies can dispose of at their own discretion.

"According to guidelines on document management drawn up in 2011, government agencies sort documents into five categories for storage, ranging from one to 30 years, according to importance. Documents left out of these categories are kept for less than a year.

"Government agencies don't have to keep records on document creation and destruction. And each has its own set of classification rules under the guidelines," The Times reports.

A Cabinet Office commission has been established that will examine current guidelines for determining which documents can be kept for less than a year.

Following a recent scandal involving the heavily discounted sale of government land, The Japanese Finance Ministry had to admit that its records of records on the negotiations with the owner had been destroyed.

Another scandal that led to the resignation of former Defense Minister Tomomi Inada concerned the daily activity logs from Ground Self-Defense Force engineering unit that was participating in U.N. peacekeeping operations in South Sudan. It was later revealed, however, that the reports still exist.

"The reports describe armed conflicts in the young, conflict-torn African nation that break Japan's conditions for allowing SDF participation in U.N. peacekeeping missions abroad, including a cease-fire.

"Both cases involved documents that agencies can destroy within a year."

## My IT Matters joins OIA partner network

The latest addition to the Office Information Australia (OIA) iManage Partner Network is Queensland consulting firm My IT Matters, headed by content management specialist Scott Cooper.

Formerly at law firm King & Wood Mallesons for some 18 years in various roles including Programme Management, IT Commercial Management, Projects and Support, Cooper focusses on content management as well as client relationship and engagement management.

Stephen Litton, Managing Director, OIA added "We've worked with Scott for a long time now and his expertise and experience is a huge addition to our channel.

"We've long taken the approach that we can't be everywhere without stretching our own resources too thin and therefore compromising our quality of service.

[www.myitmatters.com.au](http://www.myitmatters.com.au)

## Hyland partners with Deliveri Solutions

Hyland has established a reseller partnership with Australian consulting and project services specialist Deliveri Solutions Australia.

The partnership will introduce ShareBase by Hyland to Deliveri's technology portfolio, facilitating cloud-based sharing and content management.

Deliveri Solutions, part of the Gen 5 Group, provides personnel with on-demand skills and project management capabilities in market innovation, technology enablement and transformation management. The company offers end-to-end consulting services to mid-sized enterprises, breaching the gap between individual consultancies and multinationals.

Hyland ShareBase provides secure, encrypted traffic between client and data centre, with physical and logical infrastructure secured in local data centres



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# JWS Lawyers preparing an information platform for the future

**Managing documents and email is of huge importance to lawyers in every type of practice, but in the case of leading independent Australian law firm Johnson Winter & Slattery (JWS), the issue becomes even more critical owing to the many complex disputes and deals it handles for prominent local and international clients.**

Some high profile recent cases include successfully acting for Seven West Media in its highly publicised injunction proceedings against its former employee Amber Harrison. JWS also successfully represented the State of Victoria in two significant disputes with Tabcorp Holdings and Tatts Group over compensation following the expiration of their gaming licenses.

Like most law firms, JWS handles a staggering volume of documents. It is essential that the vast array of documents,

forms, and letters it receives on commencement and during a case are accurately processed and placed in a trusted repository that groups them according to the matter being represented.

Busy lawyers and paralegals complete, process, file, share, and look over dozens of documents on a daily basis. Whether preparing for discovery, collaborating with associates or filing with the court, every document must be processed accurately, efficiently and cost-effectively.

Over the past three years JWS has been undergoing the difficult and challenging task of migrating from a legacy EDRMS to a series of iManage solutions.

It has also successfully adopted an EzeScan scan and OCR workflow for ingestion of documents into iManage.

The solutions deployed by JWS include iManage Work for

document and email management as well as iManage Work Mobility, which gives employees access to their work product at any time, from any location, and iManage Insight for enterprise-wide search

"To put it simply, our existing document management system no longer met our practice requirements," explained Ross Forgione, Chief Information Officer, JWS.

"There were functionality and usability problems as well as speed and performance issues. As a result, user adoption of the system was very low."

"iManage met all of our requirements based on the features we identified as most important to our firm," said Forgione.

"Beyond the functionality of the product, we were impressed by iManage as a company: their position in the market, financial stability, ability to execute and reputation. The fact that they had 17 of the top 20 law firms in Australia and glowing reviews from existing clients was also a plus. It became quite an easy choice to make in the end."

## Like most law firms, JWS handles a staggering volume of documents.

JWS worked with iManage and EzeScan partner OIA to purchase and implement a series of iManage solutions which have now been rolled out to nearly 250 users, achieving 100% adoption. Thanks to a firm-wide policy, all documents and emails go into iManage Work rather than being stranded in different hard drives, file shares, and inboxes. In addition to supporting the firm's governance requirements, this centralisation streamlines and simplifies daily tasks, making critical work product easy to save, file, organise, and search.

Every matter begins with a bundle of documents that must be manually sorted and ingested into iManage. This typically involves a staff member manually sorting the bundle and individually scanning them at an MFD as well as adding relevant labelling and metadata.

Prior to the deployment of EzeScan, all these documents would be scanned to a network drive where somebody would have to locate them, rename and drop the files into the EDRMS where they would live as an image-only PDF that was unable to be searched.

JWS has now integrated the EzeScan inbox into the Equitrack software control panel on the MFDs in each office.

"So, when a staff member logs in it automatically identifies you and presents you with a list of your present matters or allows you to search across matters," said Forgione.

"Once you have scanned a document, EzeScan then picks it up, straightens the scanned document, OCRs it and places it into that matter directly. So, basically in one step, you've got documents ready to go and in the right place."

EzeScan also directly integrates into the individual iManage users' workspace via the EzeScan Barcode Generator WebApp. A user can simply right click on a matter in WorkSite and launch the EzeScan WebApp to produce a custom barcode coversheet for that matter.

The EzeScan WebApp is also used to generate barcode cover sheets for back-scanning the large volume of existing hardcopy files. With its direct integration with iManage the barcode provides intelligent capture capabilities using all relevant metadata for the matter file being scanned.

Placing the coversheet on the document or file being scanned allows EzeScan to automatically name the documents using the predefined convention, apply the required metadata, convert the document to a text searchable PDF/A and file it to the correct matter in WorkSite.

"I think of our EDRMS implementation as a hub-and-spoke situation, and the EzeScan product is one of those spokes that provides us with some pretty key functionality. It does what it says it would do on the box, as well, which is always nice."

"We're looking to retrospectively scan a lot of the documents that are not OCR'd at the moment, to bring them up to speed, and we know the EzeScan system will handle that quite well. We're just looking at how best to pull a document out of the matter, scan it, and put it back into the matter. It's early days on that process right now," said Forgione.

On the heels of the successful iManage Work implementation, JWS will begin rolling out Mobility to a firm-wide user base over the coming months.

"Our practitioners and their staff are incredibly dedicated, and it's not uncommon to see people working late into the evening," said Forgione. "With Mobility, they can access their critical files from any location and be as productive at home as they are in the office. That helps drive good work/life balance allowing employees to leave the office a little earlier and spend more time at home with their families."

JWS sees additional areas for iManage to add value throughout the firm as the deployment expands. "We have big plans for iManage Share and we're also excited for iManage Insight, which will strengthen our existing knowledge management processes," said Forgione.

"With their recent purchase of RAVN Systems, iManage is making some impressive investments in Artificial Intelligence (AI) and machine learning. Those capabilities are a real game-changer as far as allowing us to analyse and extract more value from the millions of documents we've accumulated over 20 years. Unlocking that cache of information allows us to compete more effectively with other firms. It's just one more way I see iManage taking us above where we are now."



"In a perfect world, where no-one's scared of technology, and efficiency is the key and the goal, using information technology and services from EzeScan and third parties and bringing it all together, we should be able to go paperless from start to finish." Ross Forgione, Chief Information Officer, JWS.

"I believe that's achievable; I believe that technology can allow us to do that. But what you do along that path is you have to decide on junctions where, if you have to inject a human element, whether it's to make people feel comfortable or whether someone can't access the technology to allow that to complete, you have to allow those on-ramps and off-ramps to occur, and that's, when you're designing these end-to-end pieces, that's what you have to keep top of mind. It's not just about convenience, it's about the end-game, and getting the end-game completed."



## Leonardo to provide IM Software for RAN Collins-class subs



UK company Leonardo has been awarded a contract by the Commonwealth of Australia's Department of Defence to deliver Information Management software to six Collins-class submarines operated by the Royal Australian Navy (RAN).

The company's SmartIDMS (Smart Information Dissemination & Management Services) is an off-the-shelf software application that will manage the transfer of data to and from Royal Australian Navy submarines;

Reducing the amount of time a submarine spends at 'periscope depth' by providing more effective data downloads reduces its exposure time and subsequently its potential exposure to detection by hostile forces;

The SmartIDMS software application, designed and manufactured in the UK, will allow RAN crews to upload and download data in a sophisticated, managed way when the submarine connects to a network.

Like most military vessels, submarines share information over computer networks. However, because they spend a great deal of time deep underwater, they are cut off from their networks for long periods. To stay in touch, a submarine must rise to just below the sea surface ('periscope depth') in order to join the network and exchange data with the outside world.

Traditionally, the data would be uploaded and downloaded in the order that it was stored, which has led to important information getting stuck in a queue behind bulky, low-priority files. Leonardo's SmartIDMS system optimises this process by intelligently choosing which information to send and receive first and which can wait, for example prioritising operating orders over personal emails. Different rules can be pre-set for different missions, so that during peacetime, for instance, improving crewmember morale can be easily achieved by raising the priority of welfare communications with their friends and families.

SmartIDMS provides significant improvements in the capabilities of any communications network. The most obvious, for submarines, are the effective management of information dissemination and the bandwidth optimisation, resulting in time and cost savings of typically over 80%.

Another advantage of the system is that other network users will see a virtual submarine that is always present on the network, even when it is disconnected, allowing them to seamlessly move

data onto the submarine which will then be synchronised when the real submarine re-connects to the network.

The company says SmartIDMS is applicable anywhere there is a risk of 'data deluge/information overload' swamping busy users, even on permanently-established high capacity networks, with SmartIDMS ensuring that the right information gets to the right people in the fastest time possible.

Leonardo's SmartIDMS application brings together a number of the company's information management capabilities that have been used by the UK Royal Navy on its surface fleet and submarines since 2007. Encompassing elements of bearer management, network management and data management, the system is focused on the optimisation of information delivery rather than simple maximisation of bandwidth.

<http://www.leonardocompany.com>

## Civica signs \$A200M deal to support new Fines Victoria model

Civica has signed its largest ever contract, a deal worth approximately \$A200 million with the Victorian State Government to support the administration of the State's new fines system and its plan for efficient and improved service delivery.

The contract signed with the Department of Justice and Regulation has been awarded for an initial five years. Civica has been engaged to support the administration of the fines system, including the operation of Contact Centre, Operational Support and Outbound Correspondence services.

The Victorian Government selected Civica after an open tender. The new partnership will support the management and operations of the Victorian Infringement and Enforcement Warrants ("VIEW") system separately awarded to Civica last year.

Civica will undertake a major recruitment of existing employees to support the introduction of the Fines Reform Act and the new VIEW system. The operation will continue to be based in Melbourne.

Richard Fiddis, Managing Director of Civica ANZ said: "We are excited to be extending our partnership with the Victorian State Government and we look forward to supporting the Department of Justice & Regulation's vision for the future, including the introduction of the Fines Reform Act and the new VIEW system. This contract represents a milestone for Civica globally and for our Australian business in particular."

## Law firm selects new Cloud DMS

Australian law firm Macpherson Kelley will upgrade its on-premises document and email management technology to NetDocuments cloud-based platform across the firm's four offices and 300 legal professionals. Feynbrook, a certified NetDocuments partner, will manage the technology transition and deployment of the SaaS cloud platform.

Matt Purves, Chief Information Officer at Macpherson Kelley, said, "As a corporate and commercial law firm, the technology we use on a daily basis to service our clients across Australia and internationally, is a key piece of our overall business and technology strategy.

"NetDocuments' focus on delivering continuous innovation around mobility and security coupled with seamless Microsoft integrations and legal-specific device synchronisation is the technology platform with personal productivity tools our legal professionals need and clients demand.

"Powerful search, mobility, platform flexibility, and built-in security and compliance, including ISO 27001 and ISO 27018 were all key factors and we simply don't see possible with on-premises or hosted DMS technology available in the market today."



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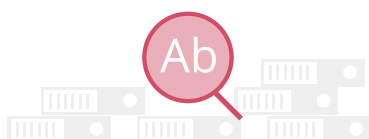
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- Increase Visibility and Control

- Optimisation of data quality
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# 7 Key Strategy Mistakes in IM

By Kate Fuelling

**I was once called in to review an organisation's records management systems (they had two, three if you count their network shared drive) and make a recommendation as to which system they should keep and which system they should decommission. The organisation had around 250 people and I undertook a consultation process with as many staff as I could access in a two-week period.**

It turned out that their records management system was the least of their problems. Their system procurement process was a free for all. Any senior manager who didn't like a current system could authorise the purchase of another one. The whole situation was totally out of control and it was causing enormous stress amongst the staff. This organisation had wasted thousands of dollars on unnecessary new systems which only offered marginal benefits (if any at all), but which caused immense confusion for the staff.

When I made my report to the organisation, I didn't recommend decommissioning either system immediately. Instead, I explained that it was critical to get a handle on their procurement strategy before they did anything else. Otherwise, the same issue would continue to rear its ugly head time and again. It wasn't a comfortable or easy conversation to have with the Executive Team, but it was an essential one.

**"Strategy is about making choices, trade-offs; it's about deliberately choosing to be different."  
- Michael Porter**

You are probably thinking that you already have an organisational strategy. And that's great. But what I'm talking about here is an IM strategy that will ensure you get the best value out of every improvement you make. You don't have unlimited time and money to throw at your IM activities, so you need to have a solid base to guide your decisions.

Your IM strategy will set out your goals (specifically linked to organisational goals), identify the projects to achieve them, and specify the order in which you are going to do them.

Now, you might ask why I advocate a one-year rather than three-year plan of projects to meet your goals. Well, it's all about the speed of change and being flexible.

Given the speed of technological development, you are better making decisions closer to your

implementation date. I don't think it's worth investing time and effort planning projects that will probably change next year anyway. It wastes time now, and it can mislead people into thinking that these items are set in stone in future. You can certainly set out general concepts over a longer period of time, but you really only need to be specific about your next 12 months of work for now.

There will always be a myriad of improvements you can make to your IM activities and it's easy to be overwhelmed with the possibilities. The practice of developing your strategy brings clarity, so that you can focus the time and money you do have on activities that will give you tangible outcomes.

This is not a long exercise. I can create an IM Strategy for an organisation of 50-200 people in two to four weeks, including consultations. It may take you a bit longer to do it yourself, but don't let it drag out beyond six weeks. You need to develop your strategy before you start work on the first set of improvement projects, so do this first and fast, then move on to other things.



## Mistake 1. You don't have an Information Management Strategy

Without any frame of reference for reviewing IM issues, you'll end up listening to the people who shout the loudest and have the most influence, even if they're not the most informed people. Or in micro-sized organisations you have to rely on your gut. If you accept that information is a strategic asset which needs to be carefully managed, then you will realise that you need a clear strategy driving your decisions that is based on carefully gathered feedback and expertise.

Most of the organisations I work with don't have an IM strategy and you can tell. Picture this: a Board member takes an overseas trip, and talks to the person they are sitting next to on the plane, who has just been a part of a project where X charity has improved donations to their organisation ten-fold because they've implemented a new Customer Relationship Management system (CRM). When they come home, the Board member suggests to the CEO that it's a good idea to get that same CRM.

The CEO, accountable to the board, sets it as a priority and suddenly the project is underway. It has been adopted without much background research, without really knowing about the issues they are trying to solve, and with little understanding whether the system is appropriate for their organisation.

This risky process usually results in the purchase of an expensive system that doesn't meet the needs of the organisation, or time and resources wasted on a project that is later abandoned.

Or picture this: A small business owner knows that they have to go 'to the Cloud' for an online customer experience platform. But their staff are being crushed by extremely manual accounting procedures and don't have time to learn how to develop the online customer experience. If the charitable organisation had an IM strategy, then both the Board member and the CEO would already know about the activities, resources, and budget that have been allocated to IM improvement projects within their organisation. The member can dream of a new CRM, but won't expect one any time soon unless it is part of the current Information Management plans and budget.

## Remember

1. Strategy should be one of your first IM projects and it should be done fast
2. The principles of your IM Strategy must be embedded into all the policies, procedures, and activities of the organisation
3. The projects of an IM Strategy should be planned, budgeted, implemented, and reviewed on an annual basis
4. Take a Digital First approach
5. Don't write War and Peace.

If the small business had an IM strategy, the business owner would know that their first priority would be to address the manual accounting procedures, thereby gaining goodwill from their people, and perhaps even investigating Cloud technology as part of the solution.

This would also help them gain knowledge about how Cloud solutions work, and therefore help them approach the customer experience platform as a more knowledgeable buyer.

## **Mistake 2. Your IM Strategy is too long and lacks practical substance**

Your strategy needs to be clear, concise, and practical.

Unfortunately, many are long-winded, full of business-speak, and have very little substance that can be implemented in a practical sense. I've lost track of how often I've read a strategy and still not known exactly what the strategy means for the organisation. From my observations, people either find it a real struggle to grasp the importance of IM, or they find it easy.

The people who find it easy don't need a ten-page strategy document to tell them why they must manage information well. While those who struggle have little intention of reading ten pages of strategy that confuses the hell out of them.

A few years ago, I read the classic novel War and Peace. In my opinion, it needed a better editor (apologies Mrs. Tolstoy). Tolstoy took so long to explain some concepts that you lost track of the plot, especially when he spent 100 pages or so explaining his philosophy of history. I'm sure this is the reason why so many people start reading it and give up partway through, because the long explanations make it hard going.

It's the same for your business documents. There is no need to take a page or more to introduce me to your organisation, the concept of a strategy, and provide me with background. If I am reading your organisational documents, I am already aware of these things. Get to the meat of what you are doing, and do it fast.

## **Mistake 3. You expect a quick, easy ROI**

Remember that I said that IM is complex? Well, so is your solution in the end. Your strategy outlines how, where, and when, you are going to invest in IM over the next few years. It all gradually builds together to form a web of benefits. So they will be spread out over a few years. So it won't be quick, or large or easy. It will be gradual, incremental and build over time.

## **Mistake 4. You don't integrate it into your organisation**

Writing the strategy is just the first step. It's worthless if you don't implement it. If your strategy is to be effective, it must be fully aligned and integrated with your organisational strategy, as well as with the plans of each department, every team, and every individual's personal development plan, no matter how small your organisation is. It also needs to specifically outline the projects, improvements, and actions you are taking to implement the strategy. In other words, you need to use your IM strategy as a roadmap to execute your projects and as a work plan for every staff member and team for the next year. As you review your Business and IM Strategies each year, you then incorporate them again into updated work plans.

## **Mistake 5. You are limiting future thinking based on current reality**

A lot of the time, I see IM strategy focused on implementing solutions such as digitising forms, or scanning hardcopy documents. Which is a great first step, but that is where their thinking stops. The people that write these strategies are letting the limitations of current reality limit their future potential. The

projects and approach of your IM strategy should be open to innovation. They should drive changes that will allow you to leverage future technologies. You should let the sky be the limit.

Start with questions like, 'What could be an extraordinary outcome for us?' and 'What do we want our future to look like?' There are times when it is appropriate to take baby steps with innovation, but always assess whether the really modern, transformational options might be viable for you. So once you have thought about digitising forms, think about what systems you could use to develop workflows that capture information along the way and create a 'record' of the process and outcome at the end of it.

## **Mistake 6. You want to digitise 'everything' and move to a paperless office**

Is this really the priority for your organisation? IM strategy, what is your reason for that? Are you going paperless to provide a better service to your clients? So that you can respond to your funding partners faster? Or just because you like the sound of it?

Don't set up your IM strategy with an IM goal in mind. Set it up with a clearly defined business outcome in mind. It is not good business to digitise all of your old files. But if you have paper files that you access on a regular basis and spend a lot of time searching through, then yes, there is value.

## **Mistake 7. Key Stakeholders not included**

You can't write an IM strategy in an Executive Team meeting, or by yourself as the owner of the business, because you and the members of your Executive Team aren't just the primary people using your IM systems. You must ask your people what they need and want from better IM. Even if there are only a handful of you in your organisation, you all need to gain benefits from your Digital by Design journey – not just you as the owner or CEO.

It's blatantly obvious when a strategy has been written by people who have no idea what is going on in the front line. It is also a big reason why the project will fail. Your people (the same people who will have to support and live with the outcomes of this strategy) need to be involved, engaged, and on board with this from the start.

People support best that which they help to create. Getting them involved will not only deliver a more representative strategy, but will also create a real sense of ownership.

So, what changes when you get strategy right?

- You have a clear direction for your Digital by Design journey
- You know what projects you will be implementing in the next 12 months, what benefits they are expected to deliver, and how much money you have budgeted for them.
- You'll be able to clearly articulate and support why you are making these changes.
- You do not restrict your organisation to 'now' solutions, so you are able to respond quickly to industry and technology changes when they occur.
- You are less likely to be forced to implement a knee-jerk reaction solution because a senior stakeholder has read about the latest Artificial Intelligence software and wants it now.

*This article is an extract from Kate Fuelling's forthcoming book entitled DIGITAL by Design: How to get the most out of your Information, Processes and Technology. Kate is an Information management specialist and the founder of Kate Fuelling Consulting. <https://kate-fuelling.com/>*





# Digitisation: A formattable foe or magnificent opportunity?

by Stephen Duncan

**The term 'digitisation' evokes a sense of total transformation and specifically for those organisations that have been in business for over 20 years, one where legacy systems or operational processes have been successfully transitioned into a state of binary form. The clear goal; improve efficiency and transparency of business activities for both clients and staff.**

The fact is in today's digital economy it's hard to find an aspect of an organisation that hasn't been touched in some way by digital evolution. Digital technology was always going to be a disruptor, but what impact does that have for those organisations that are centred on content-driven processes?

For example public sector agencies, where the digitisation journey has been less straight forward than for their private sector counterparts. AIIM research shows that there is much work to be done in this sector. In a recent survey findings report, *"Digitally Transforming Government with Good Governance"* by AIIM, only 14% of public sector respondents state the rate of converting key processes to paper-free is moving quickly.

Progress has been increasingly slow for 48% of respondents, with 15% admitting they have stalled after the first few processes. That said, the results for those that have transitioned is positive. AIIM's findings include successful results from faster customer response being the biggest benefit, followed by improved productivity and cleaner audit trails for regulatory compliance.

One area that is sparking interest amongst public sector organisations is digitising content driven processes through automation and injecting governance.

Additional benefits include better monitoring and visibility of process workflows, and fewer errors within the process. The transition has also enabled organisations to establish continuous improvement programs that further extend the value of wider spread and potentially more invasive workflow investments.

So, is digitisation a cause for concern or does it create new opportunities? The digitisation elephant comes in the form of a lack of strategy, digital capability, budget and the confidence to address governance and security requirements. Forrester, in their *"The Future of Business is Digital"* describes a similar story, saying a mere 21% of executives believe they have the right people in place to define their digital strategy, and even fewer believe they have the right people to execute it.

One area that is sparking interest amongst public sector organisations is digitising content driven processes through automation and injecting governance. From simple service forms to Cabinet submissions, AIIM describe governance as a key enabler, providing the "foundation that supports digital process transformation, and in turn...the foundation upon which the information ecosystem is built and grown". Injecting governance into business processes they state provides a framework for success by addressing the needs of customers, staff and other stakeholders for secure, reliable content.

This opens up an opportunity to focus on existing technologies such as existing Enterprise Content Management (ECM) systems



through extending the value of their content repositories and information governance rules by automating processes and seamlessly interfacing with line-of-business systems.

Take Gartner's 2017 records and document management focus as highlighted in *"The Death of ECM and Birth of Content Services"*, there is a movement from simply the securing and management of content or ECM to a wider (digital) extension of information or Content Services Platforms (CSP). Gartner appear to be positioning ECM as no longer reflecting market dynamics or the organisational needs for a one size fits all ecosystem. For applications leaders in charge of content management projects, this means casting aside previous notions and rethinking their technology approaches.

Gartner suggest establishing a roadmap for implementing and adopting new content-related technologies during the next 12 months. They recommend prioritising the user experience by focusing on content services that support users' needs within the context of their current roles and work tasks.

This means effectively extending capabilities that enhance existing platforms, for example digitising the customer experience by offering a web-based interface. By injecting governance into the design, we don't stop there, but also look to digitise the back-end process that supports it. The goal is to make the user experience for staff (within the organisation) just as easy and natural as the customer offering was.

For example completely frictionless access to information within the content repository and create tasks that executives can carry out regardless of where they work.

Governance plays a major role by ensuring that each element of the process meets critical timelines and is managed in accordance with the information policies. Modern application providers understand this, offering products and services such as applications that build on your existing technology platforms.

They say that digital transformation is a journey not a destination and digitisation is one element of that journey. Injecting governance into and extending existing capabilities for example, by adopting digital content-driven processes applications, is just one of the opportunities digitisation provides.

*Stephen Duncan is Product Marketing Manager at Objective Corporation.*



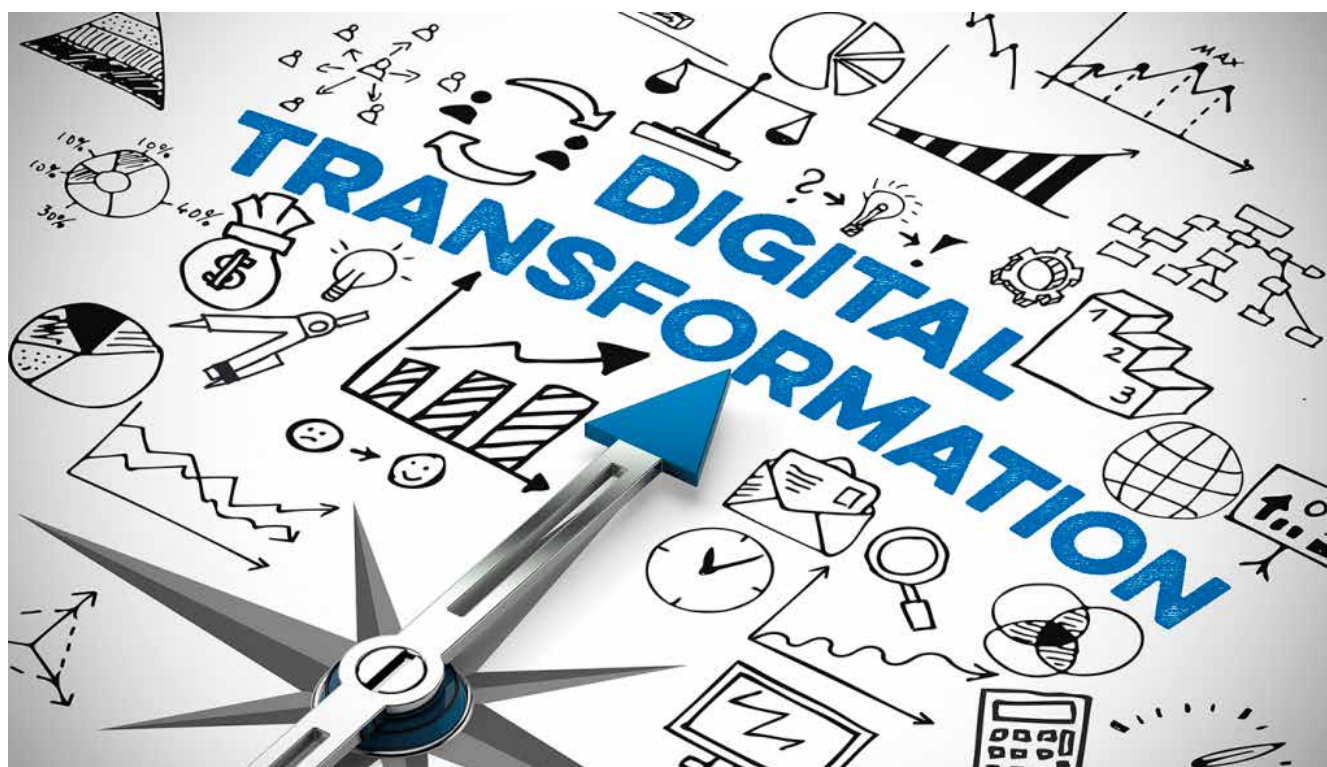
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## Krigsman Partners speeds up document processing with ABBYY

Melbourne-based financial accounting firm Krigsman Partners has revolutionised its document processing with the deployment of ABBYY FineReader 14.

As a firm providing a broad range of legal and advisory consulting services, Krigsman Partners works with a wide variety of documents including trust deeds, contracts and other legal documentation.

The firm sought a comprehensive tool to accurately convert PDFs and other scanned images into editable and searchable formats for editing and storing.

Trials of other software tools they found them slow at processing large complex documents offering unintuitive interfaces and cumbersome operation

Shortly after trialling ABBYY FineReader 14 Corporate, Krigsman Partners purchased a volume license for every member of the organisation, establishing FineReader as the default PDF tool within the organisation.

FineReader is able to merge, edit and convert PDF documents. It also contains OCR functionality which can pre-process scanned images as well as photos of documents taken with a mobile phone.

The dedicated OCR interface ensures that document format conversion is performed as smoothly as possible. Importantly this process could be automated with the 'Hot Folder' feature that automatically processed desired documents within an assigned location.

FineReader's Document Comparison tool is also highly valued with the ability to speedily compare documents of various formats, such as an image only PDF against a Microsoft Word document in the same window.

Tasks that used to take an employee a full day can now be accomplished in seconds. A good example is a recent task to compare two versions of a trust deed - one from the 1980s and one from 2000. The documents were over 40 pages in length.

Before the firm deployed FineReader 14, someone would have to compare the documents side by side, find all the differences

and changes made to either document, a process that could take a full day. With ABBYY FineReader, the firm was able to complete the task in seconds. It enables staff reviewing changes in legal documents or comparing balance sheets and financial reports to quickly spot differences in updated versions.

Financial organisations are typically slow to embrace new technology. With the amount of time saved using FineReader, Krigsman Partners believes it now enjoys a significant competitive advantage.

"ABBYY FineReader provides us with the flexibility we need for the large volume of legal and tax documentation our office receives. We can export documents quickly to any format and search, edit and email with minimal fuss. It is an essential business product for our business," said Robert Krigsman, Principal Partner, Krigsman Partners.

## ASIC launches new Chief Data Office as part of 2020 masterplan

The Australian Securities & Investments Commission (ASIC) is creating a new Chief Data Office as part of plans to evolve the way the regulator will capture, share and use data in the period leading up to 2020.

The announcement accompanied the launch of a new Data Strategy report, which ASIC says is a "high-level, principles-based document that describes how we plan to be more data-driven and intelligence-led in the future."

"This data strategy supports ASIC's alignment with whole-of-government initiatives, including the Public Data Policy and the Digital Continuity 2020 Policy."

The strategy includes establishing a data science lab, new governance forums and implementing data exchange frameworks with other Australian government agencies.

As part of the "One ASIC Regulatory Transformation Program" it plans to establish a single repository that brings together the regulatory data ASIC capture and creates, with a new search tool providing a consolidated view of entities it regulates.

Also on the agenda a single integrated customer relationship management (CRM) system to replace many of ASIC's legacy workflow systems, plus the development of a new online portal.

According to ASIC's Data Strategy report, "The next few years will see significant change to the ways we capture, share and use data. We will achieve our vision by improving our data governance, enhancing data quality, expanding digitisation and ensuring our data is integrated, catalogued and accessible. Data sharing will be improved within ASIC, while maintaining data security and privacy.

"We will provide an enhanced set of data management and analytics tools and expand data science skills across ASIC to ensure our staff have the skills, tools and data sets required to undertake their work.

"Additionally, we will engage closely with industry and other regulators on data collection to ensure we only capture information we need in a manner that is clear and streamlined.

## Corrs adopts Luminance AI technology

Australian firm Corrs Chambers Westgarth is the latest to adopt artificial intelligence technology in the due diligence process for mergers and acquisitions transactions.

Corrs will use technology developed by London-based Luminance to sort, cluster and filter large volumes of documents and find subtle but potentially significant differences between contracts.

Corrs adopted Luminance after successfully completing a pilot of the technology within their M&A department. The firm expects to use Luminance's language-agnostic technology to assist them in advising on deals both in Australia and significant markets abroad, such as the US, China and India.

"Corrs is committed to providing our clients with solutions that improve efficiency, add value and enhance experience," said Robert Regan, Corrs Sydney Partner-in-charge.

"Having already launched our own joint venture last year specialising in AI technology for contract review, we are delighted to be able to extend our AI offering to include due diligence processes by partnering with Luminance. Luminance's premium technology complements our existing AI platforms perfectly, assisting us to deliver greater efficiencies and outcomes for our clients."

Luminance detects subtle but potentially significant differences between contracts so that key issues can be highlighted at the earliest possible stage of a transaction, offering clients a better negotiating position from the outset

"Corrs is a forward-thinking, innovative firm and a leader in its market. We are delighted they have chosen to use our technology, which is further proof of the value Luminance brings to both external and in-house legal teams working on crucial projects," said Emily Foges, CEO of Luminance.

"Our successful deployment in Australia demonstrates the benefits Luminance can bring to firms around the world."

In Australia, Sydney-based Gilbert + Tobin has also adopted Luminance's technology. Luminance launched in September 2016 and has customers in 13 countries, having completed more than 150 transactions to date.

<https://www.luminance.com/>

## Adelaide Brighton streamlines accounts payable with Kofax

Stonebridge Solutions has implemented an automated accounts payable management platform for Adelaide Brighton Limited (ABL), one of Australia's leading construction material manufacturers with more than 1,500 staff.

ABL processes approximately 100,000 invoices per year across its Corporate, Cement and Lime and Concrete and Aggregates divisions, which required manual entry into the payments system. This created a lot of extra work in processing invoices. Furthermore, the manual processes meant that there were

numerous 'exceptions'; invoices that couldn't be paid without additional manual intervention.

Mark Tosolini, Group IT Manager, ABL, said, "Payments would often be stopped because people hadn't followed the correct processes. This was a clear driver to automate the accounts payable process to make it more effective and, specifically, to make exception handling as efficient as possible.

We also wanted to find a way to eradicate the physical, hardcopy invoices and reduce the amount of data entry that had to occur for each invoice.

"The previous system resulted in too many email-heavy processes. For example, finding out the status of an invoice required emailing people to ask them for an update. They would then need to physically check on the status before getting back to the original person. The time and resources required for this were significant. ABL was not in a strong position to handle growth in the number of invoices we received."

A comprehensive search for a solution culminated in the decision for ABL to work with Stonebridge Solutions, a subsidiary of Konica Minolta. Stonebridge Solutions implemented an accounts payable automation system based on OpenText Vendor Invoice Management for SAP Systems, and worked with Kofax to integrate its optical character recognition (OCR) capability into the solution. ABL originally chose Kofax for its ability to cope with emailed invoices in any format and configuration. Kofax's OCR capability extracts the data from the invoices and enters it automatically into the OpenText system, which is embedded in ABL's existing SAP system.

Mark Tosolini said, "Exceptions are now rarer and easier to deal with. Processes are far more efficient, requiring less manual intervention, which has reduced the headcount required in our Cement and Lime division while enabling our Concrete and Aggregates division to cope with increased invoice volume (as a result of business acquisitions) without staffing changes."

Since implementing the solution, ABL's Cement and Lime division now consistently processes more than 85 per cent of invoices automatically, rather than requiring manual intervention. This is a significant improvement compared with the direct processing success rate in 2014, which was as low as 30 per cent and never reached as high as 80 per cent.

## IP Australia adopts Pega Automation

Intellectual Property (IP) Australia, the Australian government agency that administers IP rights, has adopted Pega Robotic Automation to improve overall customer experience by automating business processes to significantly reduce time and costs associated with data entry.

IP Australia processes approximately 850,000 IP service requests per year, including more than 160,000 new applications for IP rights. Over time, the agency deployed multiple systems and processes to help its staff handle its growing work volume.

However, some of these processes required staff to access and move data across as many as four different systems for the same request. These labour-intensive tasks added time and effort that could be better used serving customer needs.

IP Australia will deploy Robotic Process Automation (RPA) with Pega Robotic Automation to complete many of these mundane data-entry tasks faster and more effectively.

This deployment extends Pega's partnership with IP Australia as it executes on its major business, information, communications, and technology transformation project Rights-in-One (RiO) Program.

As the first step, IP Australia previously adopted Pega Platform to maintain a seamless digital process for lodgement and processing of IP rights applications. The addition of RPA infuses rapid automation to further enhance the agency's broader digital transformation journey.



# How to make big changes without incurring big risks

By Mark Howarth

**Digital transformation is one of those catch-all concepts that you find turning up in all kinds of discussions these days. It's not a strategy and it's not a plan, although it's often confused with both.**

I usually describe it as the retooling of organisations to new technologies that automate form-based business processes (paper, PDF and simple web forms) with smart forms that connect directly to mobile, web, CRM and ERP systems to create business efficiency.

The fundamental promise of digital transformation is that organisations can create more customer value and lower costs, all while improving a customer's online experience.

When it comes to getting started, the management decisions around digital transformation centre on how much money to invest, and how fast and how far changes should be made across an organisation to capture the optimum benefits.

One approach is to create large, complex transformation projects that re-engineer the organisation in a short period of time. The other is to look at iterative steps that can deliver big changes, but without the upfront price tag and inherent financial, reputational and political risk of big projects.

## Focus on what matters most first

One area that can drive significant value through low-risk iterative changes is improving how an organisation captures and processes transactional information.

It sounds obvious but control over information lets organisations create and deliver customer value; a core driver for digital transformation in the first place.

The advent of information capture and workflow solutions, including smart forms, combined with most people's preference to interact online, is opening up new opportunities for organisations to lower costs, improve the customer experience and increase efficiency.

It also lends itself to iterative adoption. It's relatively straightforward to replace manual information collection with smart, intuitive online forms that interact in real-time with other data systems such as CRM, accounting and finance, HR and others. In particular, business processes fall into three core areas, which could be addressed individually to find improvements.

**Once you start looking at places where manual, error-prone, slow information collection points could be replaced, you will see opportunities for improvement everywhere.**

These areas are: operational or primary processes, where customer value is directly delivered through transactions; support or secondary processes that are not part of the direct customer interaction, but are necessary to run the organisation; and management, which controls information required to make decisions needed to run the organisation.

Users can collect, validate, update, or review information in online forms from a variety of devices. This reduces errors, cuts down or eliminates manual processing, enhances information



security and enables real-time updates to central systems.

Knowing inventory levels, confirming customer information or logging orders in real-time, for example, is incredibly powerful. This kind of experience is also increasingly expected by customers and employees alike.

At an organisational level, the challenge is working out which manual processes should be digitised and automated, with smart form technology first.

Once you start looking at places where manual, error-prone, slow information collection points could be replaced, you will see opportunities for improvement everywhere. It can be overwhelming.

One way to sort through priorities is to base decisions on what information and processes impact customers most.

Asking these three questions can help:

- What is the most valuable information you could produce to create exceptional customer value?
- What is the best way to deliver that information?

What is the best way to collect or create that information?

To further prioritise you could also ask:

- What information collection and management processes cost us the most (hours, errors, real dollars)?
- What processes are the simplest or easiest to move to a smart form solution?

Building maps or tables that describe, weight or score all of these will let you identify the areas where the most positive impact will be felt fastest, and can inform your overall plans.

Automating information management and introducing smart forms can yield significant improvements quickly, but without the inherent risk in big transformation projects. In our experience, there are plenty of places to start.

If you'd like to know more about introducing smart forms into your organisation in a way that supports your overall digital transformation plans, and keeps risk and cost low, then please contact me on (02) 8338 3444 or visit <http://www.axient.com.au/contact-us/>

*Mark Howarth is Managing Director of Australian solution provider Axient.*



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# Maximising your Solution ROI when going digital

By Lee Bourke

**So, you are going digital. You have started or completed a project or projects to implement digital solutions. You and your technology partner have analysed your requirements and worked hard to test and turn on a digital platform. But what then ....**

One item often overlooked when implementing digital solutions is the changing environment within which they will have to work moving forward into the future. You see, from day one of your new systems' use it will start to have a decreasing ROI.

This is due to the unstoppable changes in the environment in which this solution now operates. This environment includes the organisation, it's people, it's other processes and external factors such as the legislative environment.

Say you have implemented a solution and know that everything around that solution will continue to change causing a decreasing ROI. How can you mitigate this organisational risk?

We would strongly recommend that you have your technology partner provide a "Managed Service" for the solution/solutions.

For the purposes of this article, a managed service is a contracted set of services that are provided by a solutions provider to a solution-using customer. Typically, they are paid for monthly, operate as a use-it-or-lose-it facility and are used as needed to achieve specific solution outcomes.

For example, a company, ABC Flights, has a 6 hour per month Managed Service with its technology partner for an AP automation solution. It pays a monthly fee for this and requests work against it via a web portal.

Typically, ABC Flights uses this Managed Service to update invoice templates to ensure a high percentage of data is captured automatically when invoices enter the solution. It is also employed to make workflow routing changes, upgrade the software components to the latest version and seek advice from the solution experts on potential future projects.

So, who should demand these Managed Services? Well, we believe the customer and the technology partner should both demand them. They provide significant benefits for both parties. I have identified these benefits below;

## Benefits to the Using Customer

- An ROI that is sustained [and possibly even improved] over time - Work can be regularly scheduled to keep the system operating at peak level despite any changes to the operating environment. The Managed Service can also be used to digitise additional processes and drive even greater ROI.
- Team member satisfaction with their work as the systems they use are modern and operating well - This is more important to organisations as the millennials continue to rise through the workforce. Like it or not, this generation expects their employers to be digitally savvy.
- An ability to ensure you are maintained onto the latest versions of your software components - These versions generally have significant security upgrades as well as a slew of new and improved operating functionality.

Whilst most organisations understand the importance of software maintenance, far less of them ever actually implement a regular upgrade process to ensure they are on the latest versions of their software platforms.

This is often due to the cost of a technology partner implementing these upgrades. With a Managed Service, these upgrades can be done as part of the service thus ensuring the customer continues to reap the benefits of their investment in software maintenance.

- Priority of work request processing with your technology partner - Your technology partner will definitely process their Managed Service customers in priority over their non-contracted customers.
- A smoothing of cashflow relating to the operation of the solution - Even if you do not have a Managed Service it is highly likely that at some point in time [usually when there has been a big problem] you will need to spend a quantum of money maintaining the system. This work is generally not budgeted for.

## Benefits to the Technology Partner

- A happy customer that will often act as a referral customer - In our experience, our active Managed Service customers are easily our happiest. They get everything they want, when they want it and when there is an issue with the solution we don't waste time trying to work out who is paying, we just start work. Having a Managed Service means that the technology partner can be at their best when things are at their worse.
- The ability to resource accordingly so that service requests can be dealt with in a timely manner - When a technology partner has a critical mass of Managed Service customers they are able to staff their engineering departments with stable, high quality solution engineers. If a technology partner only ever does project work it is much harder to ensure adequate staff levels for peak demand.
- Significant increases in customer delight - As well as all the standard benefits from a happy customer there are also lots of efficiency benefits that accrue. An unhappy customer needs a lot of management. Most of that organisational effort is non-chargeable and diverts organisational effort away from strategically important tasks [like growth].
- Reduced commercial risks as deployed solutions remain valuable for the length of the agree service contract - There are less late payments and discount requests as the customers are happy.

In conclusion, there are many benefits to Managed Services however there is one key element that needs mentioning for those customers considering using one - A Managed Service is only valuable if it is actively used by the customer. Failure to use a Managed Service just leads to an unjustifiable organisational cost.

As we continue down the digital transformation path, more and more organisations will be implementing digital work solutions. These work solutions need to give great ROI and ensure that any human labour required by solution is deployed on high value tasks. First-world economies need for this to happen if they want to be able to maintain high wage levels.

Organisations that want to 'Win' in the information age need to implement solutions that deliver great ROI, delight their staff, adapt to the changing world and maintain high levels of security. Implementing a Solution Managed Service for your digital solutions is the best way of maximising your organisation's chances of being one of the 'Winners'.

*Lee Bourke is Chief Executive Officer at FileBound Australia*



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# How to Solve Content Auto-Classification with High Accuracy

By Yanko Ivanov

**As technologies evolve, we have seen the rise of auto-tagging, auto-classification, and auto-categorisation tools that attempt to take over the task for describing the content we create. These tools apply metadata tags automatically so we don't have to. Yet, in many cases the accuracy of auto-tagging efforts has been underwhelming. Why is that? More often than not, it is the way the technology has been applied, rather than the technology itself.**

Even if we implement a machine learning algorithm, we still need to teach the machine our language and the way we describe things within our domain. A machine learning algorithm is a toddler who first needs to learn the basics of your language. At EK we educate these "toddlers" by applying the following methodology.

**Develop Your Taxonomy/Thesaurus, i.e. vocabulary** - To start with, you need to teach your toddler the basics of your domain. This is where your business taxonomy is critical. It helps describe the knowledge in your organization and provides a structure from which the machine learns that solar energy is a type of energy source and that an article containing that term may be talking about energy sources, or clean energy.

We help our clients design their taxonomy so that it is intuitive for people and simultaneously understandable for a machine. Utilizing industry standards, we apply alternative labels (e.g. synonyms) for terms, as well as identify how terms are related to each other outside of a simple parent-child hierarchy.

**Select Your Teaching Tool, i.e. corpus** - Next, we need to expose our toddler to the world, or at least to a contained playground so that it can apply what it already knows (the taxonomy/thesaurus), and learn new things. To do that, we help our clients identify a representative sample of their content that we then feed to the machine learning algorithm. This achieves two goals:

- confirm that the taxonomy/thesaurus we developed actually describes the content domain of the organization; and
- identify potentially new terms or synonyms in the content that should be included in the taxonomy to ensure comprehensive coverage.

**Enhance Your Taxonomy/Thesaurus** - Integral to the step above, we now need to define additional terms or concepts so that the toddler can understand what they are and how they fit in its world.

In other words, through the automated content analysis and text mining in the previous step, we look through the items that the machine learning algorithm identified, and if applicable we include them in the correct place in the taxonomy, or add them as synonyms or alternative terms for items that already exist. This step helps enhance your taxonomy and increase its expressiveness.

In other words, revising and enhancing your taxonomy enriches your toddler's vocabulary so it can identify even more things with ever greater accuracy. This step is critical for achieving highly accurate auto-tagging results.

Think of it this way: the richer vocabulary you have, the more eloquent you are. Additionally, once the toddler has its base vocabulary, it will need less and less help when running across new terms. It will start identifying them correctly through their relationships with terms in its vocabulary.

**Achieve Accurate Auto-tagging** - The last step in this process is integrating and fine tuning your auto-tagging process. By the time we get to this step, our toddler has learned quite a bit and we're really helping him refine its vocabulary. During this step, we apply rules to disambiguate terms that could be easily mixed up like "share" as in stock vs "share" as in a piece of the pie.

In summary, auto-tagging is a powerful feature that helps organizations better describe their content while achieving better efficiency and time utilization.

By teaching your toddler your language you no longer need to take away precious time from your content creators, SMEs, and end users so that your content is properly tagged. This results in happier content creators and increased accuracy in content tagging. And the ultimate end result of this effort is content that is easier to find and reuse.

*Yanko Ivanov is a Senior Knowledge Management Consultant at Enterprise Knowledge (EK), LLC, where he focusses on business analysis, system design, and integration.*





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## A new perspective on scanning

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# From Chaos to Opportunity

## How to turn your data into gold

By Siddhartha Bhattacharya

**Organisations today are faced with exponential amounts of data entering the business in many different formats, from a wide range of sources. Most is categorised as unstructured data: email, video, audio, web chat, social media messages.**

While dealing with business data can seem like a burden, it is actually invaluable for mitigating risks within your organisation.

For example, have you ever:

- Made incorrect business decisions due to lack of data, while this data actually exists in your organisation?
- Lost clients to the competition - who have both a cost advantage and are experiencing faster business growth as a result of automating critical business workflows?
- Left a customer frustrated after struggling with a cumbersome business transaction caused by disjointed content workflows?

### Data is the new oil

It is a real challenge to manage all of that data, to extract and make sense of it, and route it into business processes or workflows. But when you treat data as a high-value asset (like oil), the information contained within is the life blood of a business, providing powerful insights that can help shape strategy, and be an effective weapon in today's competitive landscape.

Information Management professionals pride themselves on avoiding any type of data chaos. But when asked to assess how the different data sources in their businesses are managed, they admit that the newer data streams and those outside the

back office are not well managed, describing them as ad-hoc or chaotic. What makes this even more challenging are the rapid changes impacting business data. Business data is growing exponentially. Analysts predicted digital data to double every two years - but this was before the Internet of Things (IoT) even appeared on the radar. Data volume is now measured in zetta-bytes, a trillion gigabytes!

**27 percent of tech buying decisions are now made by someone other than the IT department. - CompTIA**

According to Bob Larrivee, Chief Analyst of AIIM Market Intelligence, "When you look at the broad spectrum of capturing information, including the IOT, the sources of information extends to remotely connected devices that includes security systems, health monitors, and more. Yet for many organisations that I have spoken with even today in 2017, as much as 80-90% of their information/content still consists of unstructured information, in that it is poorly organised if at all, residing in network drives, emails, and mobile devices across the enterprise and even beyond corporate walls to cloud applications."

### Multi-source and multi-format inputs create complexity

The growth of data in the enterprise is largely linked to modern work patterns and the way employees now communicate and collaborate with one another, as well as with customers, suppliers and partners.

The way we communicate has changed, not only in the private world. Business inputs no longer arrive as paper documents in the mail or well-structured inputs through Electronic data interchange (EDI) or electronic forms. Information is exchanged electronically more than ever before; documents arrive as email attachments, information is conveyed via email rather than letters, social media messages are exchanged, and let's not forget audio, photo and video files, used, for example, when documenting an accident for an insurance claim.

#### Top drivers for information capture

improved searchability	38%
reduced physical storage	26%
improved shareability	34%

An increasing number of organisations have digital transformation projects high on the agenda in line with the realisation of the benefits to the organisation, whether that's simplifying business processes, improving customer engagement, increasing productivity or generating operational cost savings. The goal for any CEO is for their organisation to achieve top and bottom line growth, and many see digital transformation as key to gaining a competitive business advantage.

However, digital transformation projects can fail, or not even get started, due to a lack of definition, unclear Return on Investment (ROI) projections, or a clear connection to the CEO's goals.

In addition, with IT departments' resources often stretched just maintaining the day-to-day operations, digital transformation can seem a daunting prospect.

## Roadblocks

One of the biggest roadblocks to scoping and implementing digital transformation projects often comes from a disconnect between Business and IT, with decisions about technology investments increasingly made outside of the IT department. A recent survey of 675 US businesses by IT industry association CompTIA found 27 percent of tech buying decisions are now made by someone other than the IT department - whether that's the head of finance, marketing, sales, logistics or any other department that's invested in a new technology solution.

**"By the end of 2017, more than 70 percent of the Global 500 will have dedicated digital transformation teams in place." - IDC**

With IT sidelined, there's a risk that business decision-makers are left to oversee the implementation of often-complex solutions without experienced tech support or consultation, thus creating another silo application, and potentially alienating the IT department.

Elsewhere, another one of the biggest challenges cited is gaining employee buy-in, which makes change management an integral part of the process

Nevertheless, digital transformation opportunities can provide a host of benefits to organisations - particularly the gains that come from automating previously labor-intensive, manual processes.

- Digital transformation projects have proven advantages in automating and optimising business workflows, resulting in greater efficiency and productivity of business transactions
- A reduction in manual intervention provides cost benefits as well as lessening processing time
- Cost reductions, and the resulting company profitability gains, are a direct result
- Faster and more comprehensive customer responses, resulting in higher satisfaction and loyalty

## Information capture is critical first step

A key starting point for any digital transformation project is the digitisation of paper-based processes through information capture.

But the optimisation and automation of business processes have one common bottleneck: the first steps where business inputs arrive from different sources and in different forms. If in paper format they then need to be digitised, attributed to the relevant workflow, and then the relevant data identified, extracted and validated. Many of these steps involve manual processes, and may or may not be integrated with other business applications and systems of record.

This is where efficiency gets significantly impacted and unnecessary costs can be incurred. Business decision-makers demand process simplicity. They want the ability to capture different types and formats of business inputs in one, integrated and consistent process, reducing inefficiencies, unnecessary cost and manual alignment

According to Quocirca's Digital Transformation Study, the top drivers for information capture are improved searchability, reduced physical storage and improved shareability. It adds that Organisations that have digitised several business processes are already reaping productivity and cost saving benefits, as well as enjoying better customer retention and enhanced employee engagement levels<sup>4</sup>.

## Tips to ensure a successful project implementation

Here are some simple steps to avoiding or overcoming hurdles in the implementation of digital transformation projects:

- Document the risk of keeping current manual processes in place
- Clearly define the project scope
- Highlight the connection to key business goals
- Get upfront buy-in from senior management
- Identify the ROI expectation (should not exceed one year)
- Ensure that the return is clearly measurable
- Reduce project steps and manual intervention
- Ensure tight implementation with business process
- Remove siloed approaches
- Pay special attention to ease of use
- Ensure close cooperation between business and IT

Small steps can make a big difference. Map out the associated data streams. Find the different input channels and repositories used, along with inter-dependencies like augmenting or validation

Identify the biggest bottlenecks in your processes. Quantify the impacts to the business that affect profitability, productivity and long-term success

Consider every step of the data and/ or document lifecycle as it impacts the end-to-end workflow. Start with the first steps in the business workflow; if you don't optimise the first steps, it will make the entire process inefficient

Identify your most business-critical workflows. Identify simple, easy to implement projects with measurable business impact. Get buy-in from the leadership team based on a clearly defined project scope and expected ROI

Also, document and communicate progress and key performance indicators against expected goals and ROI.

The volume and complexity of data entering modern organisations is only set to increase exponentially. Successful companies are channeling this data in ways that is shaping board-level decision-making. Digital transformation won't just deliver businesses a competitive edge - it will be crucial to their future success.

To learn more, visit: <https://www.kodakalaris.com/en-au/b2b>

Siddhartha Bhattacharya is Vice President - Global Marketing, Information Management, Kodak Alaris

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# Ten Things Everyone Should Know About Machine Learning

By Daniel Tunkelang

**As someone who often finds himself explaining machine learning to non-experts, I offer the following list as a public service announcement.**

Machine learning means learning from data; AI is a buzzword: Machine learning lives up to the hype: there are an incredible number of problems that you can solve by providing the right training data to the right learning algorithms. Call it AI if that helps you sell it, but know that AI, at least as used outside of academia, is often a buzzword that can mean whatever people want it to mean.

Machine learning is about data and algorithms, but mostly data: There's a lot of excitement about advances in machine learning algorithms, and particularly about deep learning. But data is the key ingredient that makes machine learning possible. You can have machine learning without sophisticated algorithms, but not without good data.

Unless you have a lot of data, you should stick to simple models: Machine learning trains a model from patterns in your data, exploring a space of possible models defined by parameters. If your parameter space is too big, you'll overfit to your training data and train a model that doesn't generalise beyond it. A detailed explanation requires more math, but as a rule you should keep your models as simple as possible.

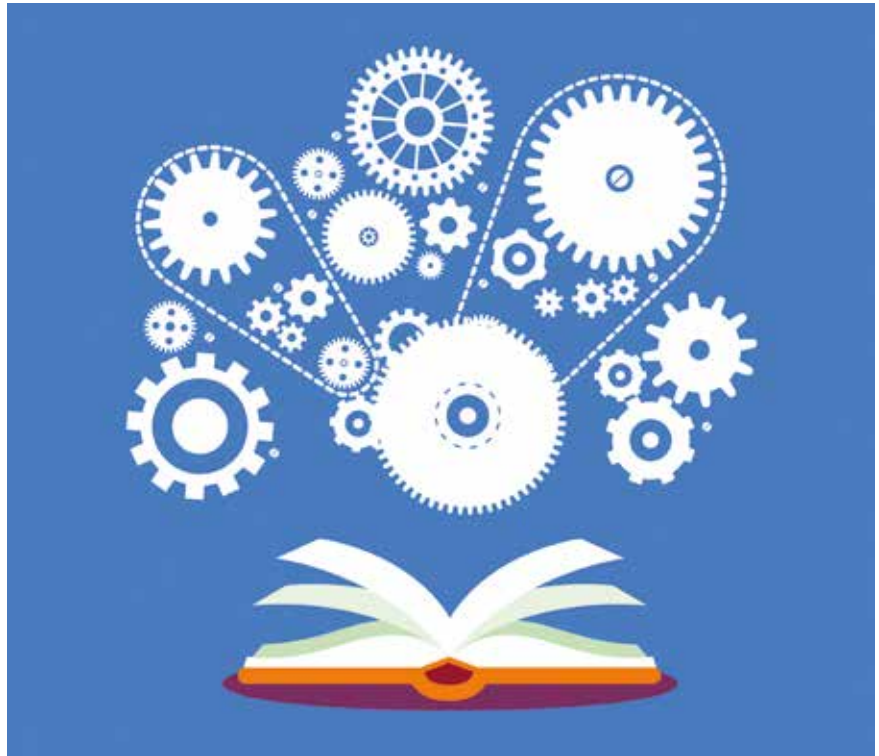
Machine learning can only be as good as the data you use to train it: The phrase "garbage in, garbage out" predates machine learning, but it aptly characterises a key limitation of machine learning. Machine learning can only discover patterns that are present in your training data. For supervised machine learning tasks like classification, you'll need a robust collection of correctly labelled, richly featured training data.

Machine learning only works if your training data is representative: Just as a fund prospectus warns that "past performance is no guarantee of future results", machine learning should warn that it's only guaranteed to work for data generated by the same distribution that generated its training data. Be vigilant of skews between training data and production data, and retrain your models frequently so they don't become stale.

Most of the hard work for machine learning is data transformation: From reading the hype about new machine learning techniques, you might think that machine learning is mostly about selecting and tuning algorithms.

The reality is more prosaic: most of your time and effort goes into data cleansing and feature engineering - that is, transforming raw features into features that better represent the signal in your data.

Deep learning is a revolutionary advance, but it isn't a magic bullet: Deep learning has earned its hype by delivering advances across a broad range of machine learning application areas. Moreover, deep learning automates some of the work traditionally performed through feature engineering, especially



for image and video data. But deep learning isn't a silver bullet. You can't just use it out of the box, and you'll still need to invest significant effort in data cleansing and transformation.

Machine learning systems are highly vulnerable to operator error: With apologies to the NRA, "Machine learning algorithms don't kill people; people kill people." When machine learning systems fail, it's rarely because of problems with the machine learning algorithm. More likely, you've introduced human error into the training data, creating bias or some other systematic error. Always be skeptical, and approach machine learning with the discipline you apply to software engineering.

Machine learning can inadvertently create a self-fulfilling prophecy: In many applications of machine learning, the decisions you make today affect the training data you collect tomorrow.

Once your machine learning system embeds biases into its model, it can continue generating new training data that reinforces those biases. And some biases can ruin people's lives. Be responsible: don't create self-fulfilling prophecies.

AI is not going to become self-aware, rise up, and destroy humanity. A surprising number of people (cough) seem to be getting their ideas about artificial intelligence from science fiction movies.

We should be inspired by science fiction, but not so credulous that we mistake it for reality. There are enough real and present dangers to worry about, from consciously evil human beings to unconsciously biased machine learning models. So you can stop worrying about SkyNet and "superintelligence".

There's far more to machine learning than I can explain in a top-10 list. But hopefully this serves as a useful introduction for non-experts.

*Daniel Tunkelang led machine learning projects at Endeca, Google, and LinkedIn.*



# Make your business case with Procure-to-Pay Calculator

**Paramount WorkPlace, a provider of web-based and mobile spend management and procurement software solutions, has launched an on line Procure-to-Pay Calculator. It enables companies to quickly quantify the return on investment (ROI) resulting from automating the procure-to-pay (P2P) process via basic metrics on existing invoice processing and staff salaries.**

The calculator was created in conjunction with PayStream Advisors, a research and advisory firm focused on business process automation in sourcing, supply chain management, procurement, accounts payable, payments, and expense management.

According to a recent report, the number-one reason companies are spending so much time on manual procure-to-pay processes is the high proportion of paper invoices they receive, while nearly the same number of survey respondents blamed most of the time crunch on the fact that they receive too many invoices not based on purchase orders.

A high volume of inquiries from suppliers related to invoice or payment status came in at number three, while a lack of automated exceptions and a lack of automated approval rounded out the list.

"The first step in any initiative is to measure the current state and determine future goals," said Khensa Bangert, VP of Marketing and Business Development for Paramount WorkPlace.

"When we researched what's available for procurement professionals, we determined a need for an effective tool that

measures current state as well as future cost saving opportunities.

"Based on this finding, we collaborated with and engaged PayStream Advisors to create this first procure-to-pay calculator for companies in the mid-market.

"A tool like this will ultimately help organisations increase efficiency, drive innovation and build a robust Procure-to-Pay platform to support growth."

Jimmy LeFever, Director of Research and Consulting for PayStream Advisors, said, "This calculator is the first of its kind. When combined with PayStream Advisors Cost-Per-Invoice calculator, procurement, accounts payable and shared services leaders will be able to calculate the true cost of their operation from purchase through payment."

The Paramount WorkPlace Procure-to-Pay Calculator differs from available procure-to-pay ROI calculators in that it allows companies to include the costs associated with both purchasing and accounts payable processes, rather than focusing solely on payables.

Users simply enter information about the number and salaries of personnel involved, the quantity of transactions, and level of current automation and the Procure-to-Pay Calculator delivers detailed results of the potential savings, along with a helpful companion guide to aid in the strategic interpretation of the results and how businesses can move forward with a P2P implementation plan.

<http://paramountworkplace.com/procure-to-pay-calculator/>

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# Making Sense of Unstructured Data with Text Analytics

By Brion Scheidel

**In case you hadn't noticed, the amount of data in the world is increasing at an exponential rate. For example, every minute there are nearly 4.2 million posts uploaded to Facebook, nearly 3 million tweets, and thousands of responses to open-ended survey questions.**

I'm often asked about all this unstructured data and how companies can make sense of it. The short answer: categorisation using text analytics. Inevitably, the follow up question is, "What's the best approach to implementing categorization using text analytics?". In this article I'm going to dive deeper into these two questions and their answers. My hope is that you'll be able to see how text analytics can help you make sense of your company's data.

How do companies make sense of all this unstructured data?

One main way is categorisation using text analytics. Categorisation is the process of defining a set of categories and then setting up a system to assign those categories to comments. Categorisation also typically involves deciding what sentiment to associate with each category assignment (e.g., Negative, Neutral, Positive). Once we have assigned categories and associated sentiments, we can start quantifying the results and displaying them in charts and reports along-side satisfaction and recommendation scores.

An airline, for example, might have a category set that would include categories such as:

- Food Quality
- Food Choice
- Food Presentation
- Food Freshness
- Food General
- Special Meals
- Drinks
- Alcoholic Drinks
- Coffee
- Tea

And that's just the set of Food and Beverage categories. They would probably also have categories related to their customers' experience at the airport, experience on the flight, and experience with customer service.

With categories and sentiment assigned, we can start analysing charts and querying data to answer specific questions such as "Which categories have the most assignments?", "Which categories have the worst sentiment?", "Which categories have downward-trending sentiment?", etc.

What's the best approach to implementing Categorization using Text Analytics? This one is not so easy to answer. I'll break my answers down into "How to implement categorization" and "Who should implement categorization".

There are two main options for the methodology (the "how") behind categorization: Machine learning and Rules-based.

**Machine learning** - Systems like IBM Watson use machine learning to do automated categorization. This means one must first define a set of categories, manually assign those categories to a training set of comments, and then feed that information to the machine learning algorithm. If all goes well, the machine learning algorithm learns the correct things from the comments it was trained with. Using the information it learned from the training set, the machine learning based system will then make category assignments to comments processed with it. One benefit of using this method of categorization is that no special skills are required. Anyone can set it up. One drawback to machine learning is that it is difficult to get good results with larger category sets (i.e. category sets with more than a handful of categories).

**Rules-based** - Another way to perform automated categorisation is through a rules-based approach. Using a combination of linguistic and logic skills, text analysts define a set of categories, then manually create rules for those categories. These rules combine the experience and expertise of the text analysts with the natural language processing (NLP) functions and processing power provided by a rules-based text analytics engine. Using those rules, the engine will then make category assignments to comments processed. This method allows you to get good results, even with larger category sets.

**Manual Categorisation** - There's actually a third option called manual categorisation which can be used instead of machine learning or rules, or in addition to them. This is the old school approach of having people read each comment and decide which categories the comment should be assigned to, and with what sentiment. While admittedly low-tech, this is actually a reasonable, cost-effective approach for small volumes and less common languages.

Once you've decided on whether to use machine learning, rules based, manual categorization, or even some combination, the next question to answer is "Who is going to implement and maintain this?" Your choices are essentially: Pay someone else to do it (service-based) or do it yourself.

**Service-based** - With a service-based approach, you select which text analytics provider best suits your needs and you pay them to categorise your comments. With this approach, text analysts leverage years of experience on your behalf. While they do the heavy lifting, you can concentrate on analysing and interpreting the text analytic results. Should you need to add a new category or tweak the logic or training behind a category, however, you need to rely on your TA provider for updates. This can take time if your TA provider isn't responsive. This is one reason some companies choose to do text analytics themselves.

**Do it Yourself** - With a DIY approach, you select which text analytics tool best suits your needs. Often the tool will come with an off-the-shelf set of categories for your sector, but this will typically get you only 70 percent of what you need. To get

good results with a DIY approach, you need to be prepared to invest time and effort to configure the category and sentiment algorithms and maintain them over time.

Here is a rough idea of what DIYers can expect to invest:

- Text Analytics Software (\$US25k to \$US200k annually)
- Rules-based: Text Analysts to implement category set (200 to 300 hours per language); Text Analysts to audit and maintain category set (100 to 200 hours annually per language)
- Machine learning based: Manual coders to create training sets (about \$1.00 per comment) (typically need at least 100 comments per category)

If you decide to do it yourself, you may wind up spending a majority of your time creating text analytic results rather than using them. While this may be a deal breaker for some, you will have full control of the process and can fine tune to your heart's content.

## Finding a Solution that Best Fits

Having a text analytics solution for your company is crucial. It will increase the speed at which you gain customer insights. Before setting up text analytics, companies first need to decide if they want to use a machine learning approach or a rules-based approach. They then need to decide on a DIY or service-based implementation.

In our experience, and for our purposes, the level of machine learning precision is not acceptable compared to the results we obtain with a rules-based approach.

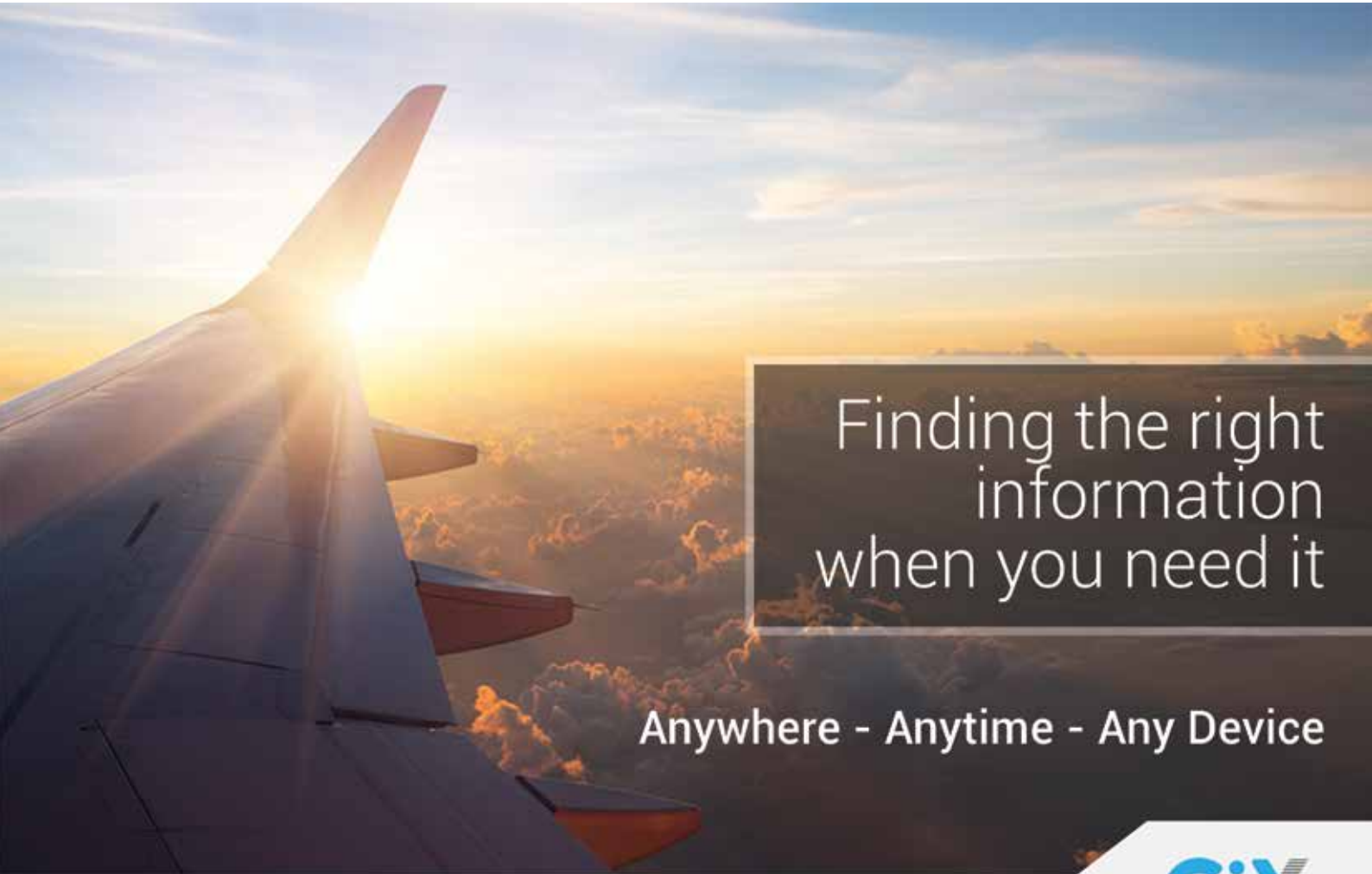
By developing and maintaining category sets with input from our customers, we ensure they are relevant and actionable. These category sets are also based on decades of experience in the various business sectors in which we work (automotive, retail, hospitality, banking, insurance, restaurant, telecommunications, etc.). We measure precision for each client implementation, and we are generally above 90 percent for categorisation, and 85 percent for sentiment.

In short, we don't use machine learning because we've discovered we get more accurate, more reliable results with our rules-based approach. This is what works best for us.

Implementing a machine learning solution may work well for your needs. It's important to do your own research before making a decision. Many companies we work with have opted for a service-based approach to categorisation, but some have chosen to invest the time and money to develop in-house text analytics solutions and expertise. And some even have a combination of the two. Most importantly, almost all have concluded that categorising their comments with text analytics is a key way to understand what their customers are saying.

Deciding which "How" and "Who" are the first steps in putting into place a solution that will help you make sense of the mounds of unstructured data that are ever-increasingly flooding into your company.

*Brion Scheidel is Director, Text Analytics at MaritzCX, a US company that utilises the technology to determine customer sentiment and apply predictive analytic techniques to help organizations increase customer retention.*



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# Improve Enterprise Search by Putting Your Metadata to Work

By Miles Kehoe

**Back in the day, enterprise search had it easy. Before Google, enterprise search gave people a way to find content on the corporate intranet, and it was amazing.**

*(continued over)*

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# Improving Enterprise Search

*(From previous page)*

"The Acme contract? Just search, it will show up."

Users were happy just to find a copy of the contract, even if it wasn't the final version or on the first page of results. But along came Google and other online search engines, and that pretty much ruined it for enterprise search.

## What Does Google Have That Enterprise Search Doesn't?

So why is web search so great while enterprise search still struggles?

In my experience, poor data quality almost always contributes, if not is fully responsible for the problem.

Part of the answer is pure volume of activity. If thousands of people perform a specific query, it's possible to use information on which results were viewed as a "signal." When the signal is fed back into the search engine, results improve over time.

Search that combines the pure volume of query activity with 'big data' tools enables machine learning software like Apache Spark to show reasonably good results that improve over time. But the tools don't create the magic here: it's the volume of data the tools can process. The more data, the better the results.

## Follow the Search Trail

What data are we talking about here?

When it comes to search, it starts with the query. But it also includes the action a user takes after receiving the list of search results. For example: what documents did the user view? What position in the result list was the first result the user viewed? How long did it take the user to come back and look at other results or even start a new query? And what was the next query and the user behaviour after that?

This type of processing is what enables sites like Google and Amazon to claim that "people like you" found a page useful or a product interesting. All of the tools needed to gather this data are available in enterprise search products today — although some platforms require more assembly than others.

Here again we return to the pure volume of activity. Google and Amazon, which track everything users do on their sites, can reliably claim "people like you" like a product or result because they know thousands - or millions - of people who searched what you searched for, and then viewed the same results you did will generally view a page or buy a given product.

Enterprise search lacks the volume to deliver the same results. Hence the perennial question: "Why can't our search be like Google?"

But Google has another advantage over enterprise search: data quality. Companies often employ teams of people to manage their presence on Google and other platforms. It even spawned its own industry: "Search engine optimisation."

## Make Metadata Work For You

The good news is enterprise search should be easy. Think about it: when you create content, do you think about 'tricking' your enterprise search platform with inaccurate metadata? Probably not.

Nonetheless, most intranet content suffers from poor metadata. So, what can you do to help insure your search platform is more useful and has better content?

First, when you create content, make sure every piece of metadata adds value. For example, look at the file and directory names where you save files. Saving the "Acme proposal" in the "Bravo Steamworks" drive folder won't help find it again.

Next, verify your name appears in the Author property field. Not that of an associate or the person whose laptop you inherited when he got fired.

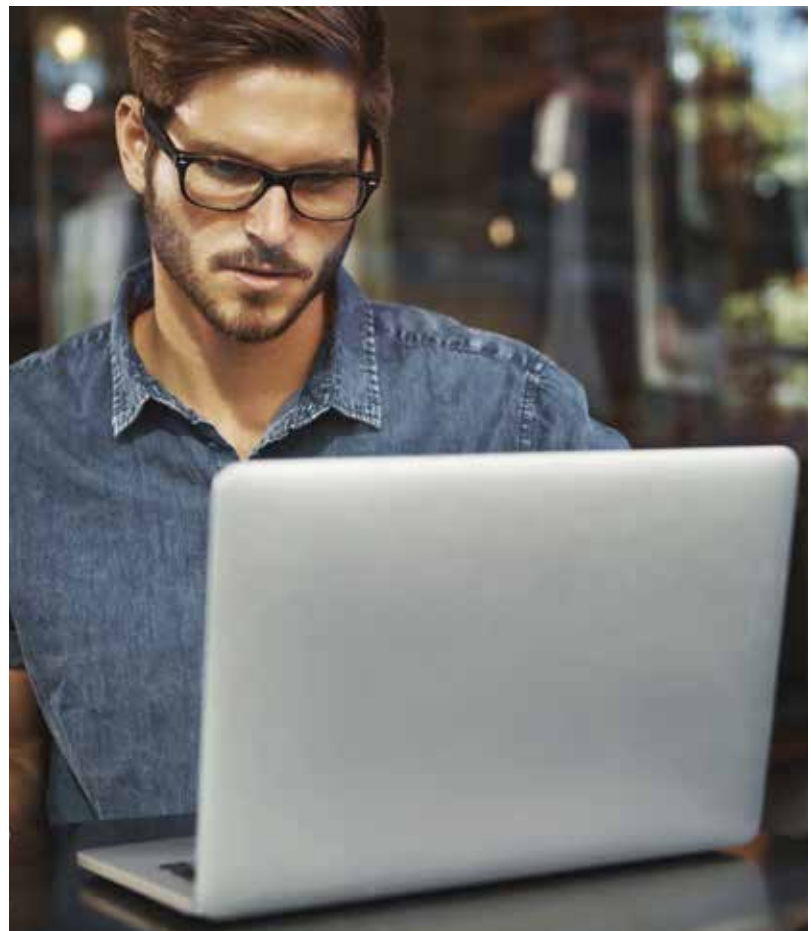
If you want to create your own fields to your documents - and your organisation uses Microsoft Office products - you'll find a little-known capability under the 'Properties' menu. Properties displays a list with a number of additional fields that search platforms generally index.

But Office documents also allows you to define custom fields. If you want to use fields like 'Region' or 'Vendors' in your documents to make it easier to find, simply add those fields as a Custom Property and assign it a value. And if your default template document already uses custom fields, you're already good to go!

## Garbage In, Garbage Out

The old adage 'garbage in, garbage out' applies to this day, particularly in enterprise search. If you create content that you hope to reliably find again, play your role to insure your search works right without any guessing games: use the metadata!

*Miles Kehoe is founder of New Idea Engineering, a vendor neutral consultancy focused on enterprise search, analytics and big data. In addition to New Idea Engineering, he has also worked at search vendors Verity, Fulcrum Technologies, and most recently at Lucidworks.*





## RecordPoint adds governance & physical records management for O365

RecordPoint has announced the release of new integration capabilities between Office 365 Advanced Data Governance (ADG) and RecordPoint's Records365 service. It has also launched a new standalone app to bring physical records management capabilities to the Office 365 platform.

Microsoft's Office 365 Advanced Data Governance assists organisations to find and retain important data while eliminating redundant, obsolete, and trivial data.

With this release, RecordPoint extends several of ADG's capabilities and provides highly regulated industries with the features to migrate, setup, and manage complex retention schemes, multi-phase disposition, and workflows. All content is managed in-place in Office 365 using ADG, with RecordPoint providing a global dashboard and analytics. This provides records and information managers easy lifecycle management of records wherever they exist within Office 365, while end users retain the experience of the modern workplace.

"Our new ADG integration builds on our trusted heritage of adding to the capabilities of the Microsoft cloud platform. Together, ADG and RecordPoint take information governance and records management in the Microsoft Cloud to the next level," said John Gunning, Head of Product - RecordPoint.

Designed to function alongside Microsoft's Office 365 Advanced Data Governance for Office 365, RecordPoint will now provide end-to-end physical and paper management processes integrated into the Office 365 platform.

It allows users to capture, request, package, and distribute paper records alongside the management of in-place electronic records in Office 365.

## Veritas extends coverage of Information Map

Veritas has announced enhancements to the company's flagship offering, Veritas Information Map, with new data connectors for 23 new data sources for both on-premises and cloud-based data storage repositories.

Information Map provides a real-time picture and interactive view of an organisation's data assets. This broad visibility enables users to make better decisions about what data to retain, migrate or delete and can also help ensure compliance with data regulations around the world, such as HIPAA and the European Union's forthcoming General Data Protection Regulation (GDPR).

The new connectors will be generally available in the coming quarters, at no additional cost and include Microsoft Azure Storage, Microsoft OneDrive for Business, Microsoft SQL Server, Microsoft Office 365, Microsoft Exchange, Google Drive, Google Cloud Storage, Oracle Database, Box and others.

Additional product integrations will also be available with Veritas Backup Exec, Veritas Enterprise Vault and Veritas Access, providing greater visibility into data.

Information Map is available as a stand-alone purchase or as part of the Veritas 360 Data Management Suite. To deploy the new connectors, customers will be able to leverage Information Map's new Connection Center

a central interface for managing all data store connectors that also includes a sharable, plug-and-play framework to accelerate development and delivery of these and future connectors, from Veritas and our worldwide technology partners.

Veritas has also announced a new deduplication technology, Veritas NetBackup CloudCatalyst, will be included with the launch of NetBackup 8.1. With Cloud Catalyst, backups can be executed more quickly and extra cost savings can be realised when migrating data to hybrid, private or public clouds.

## Xillio automated image classification

Xillio, a Dutch firm that specialises in content migration and integration software and services, has added a new automated image classification service to its portfolio.

Based on visual image recognition, Xillio adds labels and tags to images based on the content of that image. With this service, Xillio offers the ability to further enhance content quality, making content easier to find and more manageable, and easier for users to identify, and sort, unwanted content.

Adding tags to images is a simple way to specify the meta information of that image. For example, a tag may be an object, subject or a theme.

The "person" tag is assigned to images with people or the "car" tag to images showing cars. This service is designed for organisations that want add more value to existing visual content; organisations with multiple product photos in a digital asset management (DAM) system or a web content management (WCM) environment used by an editorial staff on daily basis.

In addition to automated content migration, Xillio offers services to improve content quality and quantity. For example, the solution provides the ability for users to find duplicate documents, identify privacy sensitive content (such as passports and driving licenses), classify documents (e.g. document type or subject) and now the ability to classify images and photos.

## A drone drive that's ready to fly!



Seagate Technology has announced the Australian and New Zealand availability of the Fly Drive released earlier this year in partnership with DJI, the world's leading manufacturer of unmanned aerial vehicles (UAVs). The product aims to solve the data demands of drone users as they are creating more content than ever before.

As drone cameras gain resolution and drone flight times grow longer, Fly Drive allows users to securely and efficiently store, manage, backup, download and share their photo and video content on location, thanks to its large storage capacity, integrated MicroSD card slot, quick transfer speeds and durable build.

Up to 2TB of capacity - With this kind of space, Fly Drive can store over 60 hours of 4K 30fps video footage.

MicroSD Card Slot - Managing multiple SD cards, readers and cables in the field is a pain. Thanks to an integrated hub that's UHS-II-rated, it lets the user be more effective in the field by being able to quickly drag and drop 4K files from the MicroSD card to Fly Drive or the computer.

USB 3.1 Interface - Compatible with both Mac and Windows, Fly Drive's USB 3.1 Type-C interface allows for fast file transfers with the latest generation Thunderbolt 3 and USB 3.1 computers.

*The Seagate DJI Fly Drive is now available for \$A179 at Officeworks, JB HiFi and Bing Lee and for \$NZ199 at Noel Leeming and PB Tech.*





# **QEnergy powers up business processes**

**QEnergy, a Brisbane-based energy retailer that began operating in 2009 specialising in servicing small businesses, has now broadened into the residential market. As part of a push to improve its internal business operation, QEnergy sought a solution to improve processes within their Accounts Receivables (AR) department.**

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# QEnergy powers up business processes

*(From previous page)*

The AR system that was in place required significant manual processing by employees, which meant slow turnaround times and payment/contract processing errors. Ultimately, this resulted in bottlenecks, unreliable records, and customer complaints. QEnergy staff wanted a better solution than the current system could provide

With support from FileBound Australia, QEnergy implemented FileBound's workflow incorporating DocuSign digital signature capabilities in less than three weeks to improve and standardise its contract management and accounts receivable practices. This upgrade helped ease the burden of manual processes from existing staff. After a seamless integration, AR staff now have the freedom to focus on high-value work.

"We have embraced FileBound now for well over two years at QEnergy, and it is a part of our landscape that will be utilised more and more as we update and upgrade our systems. Investment in FileBound solutions is a no-brainer, the efficiency improvements pay for themselves in no time," said Scott Henderson, CEO, QEnergy.

"FileBound has cut costs by allowing resources to concentrate on optimising our trading portfolio, rather than spending time signing paperwork manually, creating audit materials, and dealing with the resulting data entry of trade information," said Henderson.

"FileBound has it all - integration, workflow, and the flexibility to help any business streamline their processes."

At QEnergy, the AR Collections team was having difficulty processing customer demand letters in a timely fashion. This stemmed from an overload of manual tasks related to payment demand processing. The standard procedures for AR required manual processes to be followed by all participants in a timely fashion, which often meant bottlenecks and time lost due to human errors, inefficiencies, and incomplete or incorrect data.

When staff encountered inaccurate information, customer interactions became terse, as they had to resupply information to overworked staff that then felt rushed to input data, creating a cycle of human error, hold ups, and even missing information or documentation.

Staff were overburdened by manual tasks, rather than focusing on larger goals to benefit the company. A lack of a transparent, standard workflow and document processes was also a concern in terms of compliance and audit procedures.

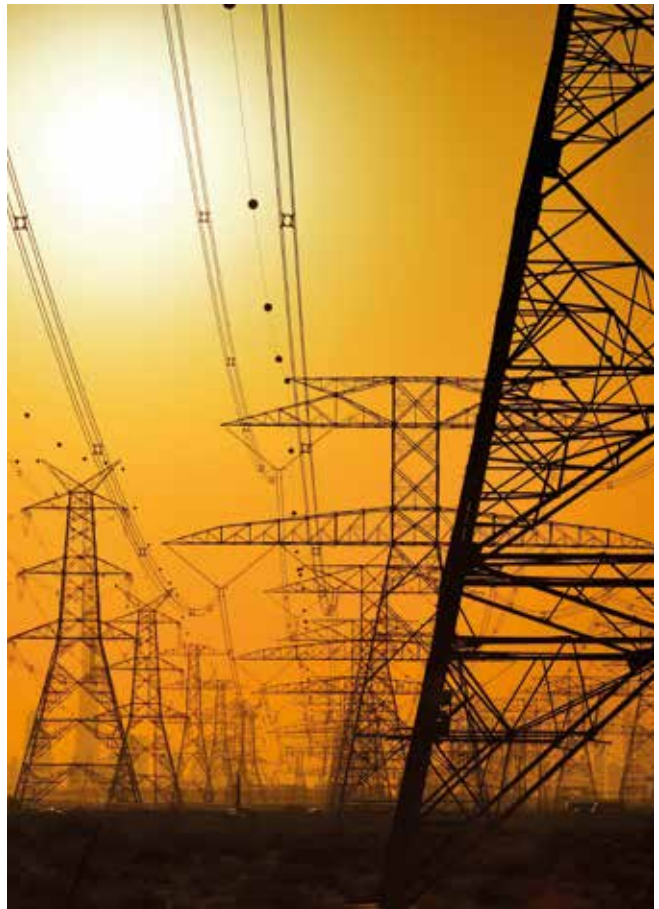
Once FileBound was implemented and working in tandem with existing systems, QEnergy quickly saw an improvement in process efficiency, regulatory compliance, data accuracy, and employee productivity.

## Contract Management

After QEnergy realised the benefits of implementing FileBound into their AR processes, they decided to also use FileBound to smooth the contract management process by reducing the time spent on energy trading confirmations.

With the implementation of FileBound (using DocuSign integration), the processing time associated with acquiring signatures for trading confirmations has been reduced and the accuracy of information has been significantly increased. In addition, the solution also produces analytical data that can be used for strategic optimisation of the energy trading function - processes that were previously manual and managed in error-prone spreadsheets.

FileBound eliminates the manual errors formerly associated



with trading confirmation processes, and ensures compliance by creating a complete and thorough audit trail that tracks and stores data. Information is easily retrievable from any location by staff or permissioned external contacts, for everyday tasks as well as for compliance and audit purposes.

Lee Green, Sales Director for FileBound Australia, said, "Automation can solve many different challenges for an organisation which is what makes it so exciting. Some of the key ones include increasing process efficiency, reducing errors, improving transparency and lowering costs.

"FileBound has partnered with DocuSign in the US for some time. We wanted to extend that partnership locally so we could integrate eSignatures into customer workflows.

"Our work with QEnergy was a catalyst for making it happen. We had already helped the company to improve its accounts receivable processes and they approached us to find a better way to manage their energy trade contracts and confirmations."

QEnergy's process at the time was very manual. Their team would have to print, sign, scan, and email trade confirmations before appending an audit page to each confirmation and saving it to the file server. They would then manually enter the data into their trading system.

"Using the DocuSign API, we were able to stand up a solution in just three weeks to improve the way QEnergy manages its energy trade contracts. These can now be signed electronically from anywhere, at any time," said Green

"Also, data from inbound documents is extracted automatically and flows right into QEnergy's data warehouse.

"The solution has improved compliance with audit requirements and reduced processing time for trade confirmations by 50%. Also, the company has more time and data which it can use to optimise its trading portfolio."

## American doctors sick of data burden

American GPs now spend more than half of each workday typing into computers and completing other tasks in electronic health records, according to a new US study conducted by the doctors' association and the University of Wisconsin. The GPs complain the workload is taking time away from patient care.

Using IT event logs and direct observation data, researchers found that during a typical 11.4-hour workday GPs spent almost six hours on data entry and other tasks within EHR systems.

"This study reveals what many primary care physicians already know – data entry tasks associated with EHR systems are significantly cutting into available time for physicians to engage with patients," American Medical Association President Dr David O. Barbe reportedly said of the research.

He blames poorly designed and implemented EHRs for a growing sense among general practitioners they are neglecting their patients as they try to keep up with an overload of type-and-click tasks.

The US AMA said it recognised many changes could only be implemented in the long-term due to vendor product development lifecycles, limitations of current legacy systems and existing contracts, regulations and institutional policies.

"However, there is a great sense of urgency to improve EHRs because every patient encounter and the physician's ability to provide high-quality care is affected by the current state of usability," the association said in a call to action.

## Soggy server set for date with Supreme Court

Creditors seeking the company records of collapsed Gold Coast builder Queensland One Homes have been told the company's server, which contained two hard drives, had been left out in the back of a ute and been water damaged.

The Gold Coast Bulletin reports that sole company director Paul Callender will be asked to appear before the Supreme Court for a public examination about the destruction of company records.

Liquidator Michael Caspaney told creditors there were debts of almost \$A6 million when the company went into liquidation in July. He also told creditors he'd "faced difficulties" collecting records on Queensland One Homes.

"The minutes of the meeting said the liquidator had received the company's server, which contained two hard drives, which had been left out in the back of a ute and been water damaged," The Gold Coast Bulletin reports.

"Expert data recovery consultants advised that the two hard drives that were left in the server were only a part of a larger array of hard drives," the minutes said.

"The advice was that without the other drives from the array, it would be impossible to recover any data. This suggests that the other hard drives were taken out of the server before it was placed into the utility."

Mr Caspaney was told there were no backups the server available, which had been in use up to 11 days after the company went into liquidation on July 6.

## NatWest launches UK's first paperless mortgage

Leading UK bank NatWest has launched the UK's first paperless mortgage, which promises to dramatically reduce turnaround times.

The lender claimed the innovation means offers can be made within 24 hours and the average offer time will be 10 days faster.

Instead of sending signed paperwork or personal and private information through the post, borrowers can upload documents such as a driving licence, passport and payslips via an online portal.

A telephone call with a mortgage adviser will then be arranged to guide the customer through the process, before they sign the final documents electronically using a mouse or tablet.

All NatWest mortgages applied for over the phone will be offered paper-free – a move the lender said could save over 4.4 million sheets of A4 paper a year.

Lloyd Cochrane, director of mortgages at NatWest told the Financial Times: "This innovation will make the process of buying a new home much simpler, easier and faster for our customers, transforming the way homes are purchased in the UK."

After an initial conversation and guideline affordability calculation, a formal appointment with a mortgage adviser is booked.

Prior to the appointment the customer's case is created on the portal system and an email sent to prompt them to register, along with a two minute video introducing the service and explaining how it will work.

Once registered, the customer is given a list of items NatWest believes they need to upload, such as identification documents or payslips.

These can either be uploaded as scanned in files or by photo taken there and then. Where identification is concerned, the system links to Experian which verifies the document and the customer is then given 10 minutes to take a selfie.

That appointment is also augmented with a virtual meeting where documents are shared, explained and key parts highlighted, and if the customer is happy to do so, a signed acceptance of the mortgage offer can be made either using the touch screen, mouse or keyboard at that point.



# An action plan to implement electronic signatures

By Lydia Loriente

**One of the final frontiers before moving to electronic record-keeping is eliminating 'wet signatures', or hand-signing. In most cases in Australasia, we are allowed to replace hand-signing with an electronic method. This is good news, since manual records are becoming increasingly difficult to manage, as more and more business transactions and information management moves to digital systems.**

An electronic signature, also called a digital approval, is any electronic method which carries the intention of being a signature. Examples include a recorded sound (a person saying 'yes' on the phone), an electronically captured drawing (a person writing their name or initials on an electronic touch pad), or an electronic process (such as email, or selecting 'submit' or 'I approve' on an online form). Strictly speaking, a 'digital signature' is a special type of electronic signature, but be aware that some people use the term to refer more broadly to electronic signatures. It behaves like an electronic stamp that can authenticate the sender and the person signing. It is designed to provide greater protections and security to electronic signatures.

Digital signatures can be complex and costly to implement, but are worth considering for higher risk or higher value authorisations, or to provide increased protections around using electronic signatures. Electronic signatures offer a range of conveniences and protections. Approvers do not need to be in the same physical location if a signature can be made from an electronic device such as a computer, tablet or phone. There are more protections of verifying the identity of the signatory, if the method requires the signer to log in to a portal or system that recognises their identity.

## Developing an action plan

Practitioners may want to use electronic signatures but not know where to start, what is allowed, or who they need to check with. What follows is an action plan to get your organisation to stop signing paper and start using electronic signatures.

**1. Address laws, culture and policy** - Legislation in most Australasian jurisdictions allows for the use of electronic signatures in most situations. There are selected exceptions, so always seek legal advice to be sure. Exceptions are usually around very specific matters or methods of signing, such as documents requiring a manual witness signature. Usually, other

legislation or rules specify that the particular signature be carried out that (manual) way.

Generally, if the signature is required internally in your organisation, because of policy or procedures, it is likely allowed to go digital (but if not sure, check). If the signature relates to external parties, it may still be allowed, but the implementation may be more complex due to both parties needing access to the same, or integrated, technologies.

An electronic signature must comply with three criteria: identity, reliability and consent. These criteria require that there is a way to identify the person and their intention to sign, that the method used be reliable, and that the person or organisation accepting the signature consents to receiving it electronically.

Culture will influence whether you can begin or succeed in implementing electronic signatures. Some workplaces may have a history or culture of hand-signing particular documents. It may be difficult to get staff on board if they hold a belief that the manual signature is mandatory, more trusted, or more official. Some people still prefer to print and hand-sign a letter, even if they send a scan of it electronically. These preferences for hand-signing can be hard to change. You need to identify these preferences, and try to address staff concerns and attitudes.

It can be easy to forget that electronic signatures are already in use for some workplace activities, and likely in our personal lives too. Remind staff of examples that are so routine we may not even think of them. When buying car insurance, when was the last time you signed a contract? In most cases you would have completed an online form, or had a recording captured of you saying 'yes' or 'I agree' over the phone. If your workplace has any existing electronic approval processes, such as an HR system for approving leave, highlight these as examples of it being acceptable.

Some workplaces may have policies, procedures, and manual forms that say a hand-signature is required. It is possible that they were created before legislation allowed for electronic signatures, which only came into existence around 1999-2000 in most Australasian jurisdictions. Or the documents may have been created or last reviewed when there were less reliable technology options available for electronic signatures. Review these requirements. If electronic signatures are allowed, get these documents reviewed and updated to reflect that.

Consider implementing an organisation-wide policy and procedure for electronic signatures. As part of your change management, form a working party to draft it. Consider running a short online survey, or putting a call out for input and feedback. Including stakeholders can improve buy-in. At some stage in the future, an electronic signatures policy will become unnecessary, as more and more processes move online. But it is acceptable to have such a policy to get your organisation over the line now. It can also address the 'consent' criteria of electronic signatures, and empower staff to act.

Make a list of your stakeholders, and consider inviting them to be on your working party:

- Records, archives, information management;
- Policy, risk or compliance areas;
- Administrative staff who would be impacted by any changes;
- Relevant managers and senior staff;
- Representatives from teams that already use electronic signatures;
- IT support and/or IT security and risk;

## Digital signature market set to surge

According to a recent report published by Allied Market Research, the global market for digital signatures, currently valued at \$US517 million, is projected to reach \$US3,440 million by 2022. The report found that demand for secure electronic banking will be the leading market driver for digital signatures, and among industry verticals, the government sector is expected to grow at the second highest CAGR during the forecast period. China and rest of Asia-Pacific jointly accounted for about 52.8% share of the Asia-Pacific digital signature market in 2015, with the former constituting around 35.5%. From a growth perspective, Australia and India are the two potential markets expected to witness significant growth rates over the next 5 years.



- Any other relevant stakeholders; or
- If there is not much expertise or experience within your organisation, consider co-opting some members external to the organisation who have the relevant experience.

**2. Assess the available technology** - Make a list (or locate an existing list) of the systems and technologies currently in use or able to be used for electronic signatures. Some examples include workflow within an EDRMS, email, some online forms technology and more. While not strictly speaking an electronic signature, one option is to require that any hand-signed documents are scanned and emailed or submitted online. Technically you are receiving a digital document, so you can continue to manage it electronically. This could be an interim measure if other options are not available.

**3. Select a form or process to move to electronic signatures** - Make a list of all the paper-based forms that exist, and all the letters or memos that normally get signed. It's not just contracts and agreements. How do staff in leadership positions approve or endorse a new policy, procedure or guideline? How does the Chair of a committee approve minutes? How do you get approval to spend money on catering for an event? If possible, pick an internal process, as it may be easier to implement an electronic signature with enterprise-wide systems and software, and within the same organisation's policies and processes.

Consult with your working party and/or stakeholders, and come up with a plan. Ensure you use change management techniques such as good and regular communications explaining the upcoming change and how it will work.

If your workplace has access to online forms, preferably that recognise who is logged into the intranet or portal, that could be used. Just ensure that any forms require the signer to actively tick a box that says 'I approve of ...'. It is not acceptable to have the 'I approve' box pre-ticked, as it's less clear then whether the signer was aware of it and actively accepted it.

For email, if someone sends a document as an attachment, and the email includes 'I approve the attached', that could be acceptable. Just make sure you have a process in place for how you will capture and manage the record of that signature. Will you save the email as an .eml or PDF file, and register it, with the attachment, into an EDRMS?

**4. Write a case study to support further use of electronic signatures** - Once you have implemented an electronic signature, write up a case study about what you did and how it worked (and any lessons learnt). Try to quote positive feedback from stakeholders. Your case study could be shared in staff communications such as newsletters and on notice boards (electronic or physical), and explained at staff meetings. It can also be referenced in any future business case to propose the purchase of dedicated electronic signature software, workflow, or integrations with other systems.

It is important to make sure that the technology you use will meet not only the requirements for conducting an electronic signature, but also the recordkeeping requirements for the signature (which may be temporary, long term, or permanent).

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## Considerations for purchasing esignature (approval) software

There are a range of technologies available to facilitate electronic signatures and the recordkeeping of them. Some are stand-alone products, some integrate with other systems, and some may be features of existing systems such as an EDRMS that just need to be configured or turned on. Here are some considerations you should be aware of:

**1. Licensing** - You will need to consider how licensing works. Does every staff member need access, and is licensing affordable if it needs to include every staff member?

**2. Single sign-on (SSO)** - Can the system integrate with existing login infrastructure, such as single sign on? Uptake of the system may be difficult if staff need to create and maintain separate passwords and logins, and it could be difficult to verify if the signer is who they purport to be, if the system cannot integrate with existing sign-on processes.

**3. Fit for purpose** - Team/process-specific or enterprise wide? Does it integrate with existing systems/EDRMS/website/email - Make a list in advance of your requirements for electronic signatures, current as well as anticipated future needs. Sometimes an enterprise wide system may be best, to accommodate a diversity of signature needs. However, sometimes a standalone system or integration is acceptable, if it solves a particular team or business process need. For instance, if you already have an electronic HR system, that may have the ability to accept electronic approvals (signatures) for leave requests, as the system already has information about staff entitlements, supervisors and more.

**4. Don't forget the recordkeeping for the signature** - Features essential to recordkeeping (including disposal)

- Does the system support compliant recordkeeping and information security practices?
- interoperable metadata
- Able to migrate records to another system
- Audit logs
- Protection from unauthorised deletion
- sentencing and disposal

It is important to make sure that the technology you use will meet not only the requirements for conducting an electronic signature, but the (temporary or long term, sometimes permanent) recordkeeping requirements for the signature.

Understand what recordkeeping standards or legislation apply to your organisation. Then assess whether the technology you are considering meets the requirements. Depending on the retention period or the importance of the signature, it may be acceptable to take a risk-based approach, and in some circumstances, accept a system that does not tick all the boxes. However, you should document the process you followed to make this assessment, and keep records of it.

Think about, how long will the record of the approval need to be kept? If it is for more than a few years, is there a plan for the maintenance, and possible migration, of the record of the signature, to ensure it can be accessed and used for the time it must be kept for? If the expected sentence of the signature record is temporary (temporary could mean six months or sixty-plus years), is there a way for the system to identify records due for destruction and dispose of them? This is where integrations with an EDRMS may be appealing, as an EDRMS is designed to handle sentencing and disposal of records.

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## Monolithic ECM suites giving way to new content Platforms: Study

In a recent survey commissioned by ASG Technologies, Forrester Consulting found the increased need for modern approaches to enterprise content management (ECM) in today's fast-paced, hybrid IT environment. The results show that technology leaders are seeking tools and approaches that enable them to access, view and use any content regardless of location, while concurrently there is increased urgency and challenges surrounding how to protect both customer and enterprise data in the wake of mounting regulatory and compliance demands.

"The monolithic ECM suites that have been pervasive in enterprises for decades are giving way to modern -- often cloud-based -- content platforms," the Forrester study states. A new approach to content management, one that utilizes a content services architecture, can enable businesses to easily access and integrate content from any device, anywhere to help enterprises improve the way they access and manage content.

"Volumes of unstructured data stores are growing while users simultaneously desire and expect access to information wherever and whenever it is needed. To manage that, enterprises must implement flexible content services architectures that enable well-developed processes and procedures, no matter where information is stored," said Swamy Viswanathan, Chief Product Officer and Executive Vice President, ASG Technologies.

"We believe this study clearly illustrates the ECM challenges facing today's enterprise and the strategies businesses are employing to adapt to the hybrid IT environment."

Specifically, the research revealed that standardizing on one ECM solution is not the reality for today's enterprise. 93 percent of companies are using multiple repositories to store content, with 31 percent using more than five systems to manage it. Over the past 24 months, 50 percent have seen the volume of unstructured data increase by greater than 10 percent, making it a significant struggle to keep up.

The commissioned custom Technology Adoption Profile titled, *"Today's Content Management Demands a Modern Approach,"* and conducted by Forrester Consulting on behalf of ASG Technologies, yielded the following findings:

- Enterprises are coping with increasingly large volumes of unstructured data in the form of business content ... and rich media.
  - The top enterprise content management challenges consist of regulatory and security requirements, demand for mobile accessibility and the limitations of legacy systems
  - Enterprises are investing in numerous systems to manage content, some using more than five applications at one time, resulting in a complex architecture with overlapping platforms
- With the next two years poised to be the transition period for enterprise content management to embrace cloud deployments, companies will increasingly implement a new hybrid approach that enables enterprises to leverage legacy applications while simultaneously delivering the seamless access to content that employees need in today's fast-paced business environment.

## M-Files buys into AI for ECM

M-Files Corporation has announced the acquisition of Apprento, a Canadian-based provider of artificial intelligence and natural language processing technology solutions. Apprento technology automatically draws intelligence from text in unstructured content, which streamlines the process of classifying, processing and securing business information while also providing contextual insights on related content assets and workflows.

The Apprento Business Context Engine features patent-pending technology that employs natural language processing (NLP) and natural language understanding (NLU) capabilities to understand both semantics and concepts in content and communication systems.

M-Files also recently-announced a partnership with ABBYY, the global provider of innovative language-based and artificial intelligence technologies, further extending its focus on automating and simplifying the way business professionals manage information and related processes.

"Business leaders, industry analysts and others who follow our industry all agree that traditional approaches and solutions for managing information are inadequate and that a new and more intelligent approach is required," said Miika Mäkitalo, CEO at M-Files.

"Our acquisition of Apprento coupled with our recent partnership with ABBYY reinforces our commitment to deliver human-like intelligence to the massive volume of unstructured content that resides within disconnected systems and repositories in the typical enterprise."

"By incorporating the Apprento Business Context Engine into the M-Files platform, we're delivering powerful artificial intelligence capabilities to current M-Files users as well as setting the foundation for the introduction of many more AI enhancements and tools in the near future," said Trevor Cookson, CEO at Apprento.

## Knowledgeone launches info management apps in the cloud

Knowledgeone Corporation has announced an entirely new way for small business, corporations and government agencies to run sophisticated information management applications (Apps) in the Cloud. There are two Apps initially available at <https://rf6cloud.com>: Records Management (RMS - for physical records management) and Electronic Records and Document Management (EDRMS - RMS + electronic document management, document imaging, etc.).

A series of Apps to be rolled out progressively over the next 6 months will include Asset Tracking, Software License Tracking, Contract Tracking, Collection Tracking, Work Tracking, Accounts Payable Tracking, Membership Tracking and HR Tracking.

Knowledgeone CEO Frank McKenna, said, "Our objective with this new Web site was to provide the world's easiest and lowest cost way for our customers to run sophisticated, fully-functional applications like Electronic Records & Document Management without the need for a computer room, servers, IT staff, consultants, trainers, software installations or software maintenance.

"This is a truly new & disruptive paradigm that completely smashes the old expensive to purchase, expensive & difficult to install, expensive to run and expensive & difficult to maintain paradigm of heavy duty application software.

"For example, all training courses and support are free on our new website, all of a customer's data and standards can be easily uploaded and configured by the customer via their MyConsole link.

"We use certified IBM BlueMix Data Centers and we manage everything, including software upgrades and backups, all the customer has to do is sign up and use the App. We even addressed the annoying problem of overly-complex and unpredictable Cloud billing with a new and totally transparent approach to billing based on a single, fixed subscription per user per month starting from as low as \$U69 per month."

Knowledgeone is an IBM Partner will use its BlueMix data centres exclusively to provide industrial strength security, high performance and high availability.

<https://rf6cloud.com/>



# On the Benefits of Page Classification

By Alexander Goerke

**Classification deals with the categorisation of objects. In our process automation and digitisation world, we often think of the objects as complete documents that need to be classified.**

Of course, it is important to understand what the type of a document is and automatic classification can determine exactly this. But documents in a business context normally are complex and not homogenous.

As a person, when you get a multipage document you typically will browse through it to see what is in it to understand what it is about. A document in an envelope or a manila folder that you receive on your desk may consist of an opening letter, some notes, then the real important document, like for example the court order, and maybe attached some standard forms.

To understand which process to initiate and what to do with the document you will therefore look at the pages and decide how you can determine from their content what this is all about. Maybe even two or more processes originate from different pages within one document where you might need to answer a request from one page and execute a payment from another page.

This is exactly what page classification in document understanding is able to provide automatically. Instead of looking at the document as a whole the algorithm will classify page by page and derive decisions from the results.

This is much more granular than taking only the complete document. And it is different from automatic document separation which is physically splitting the document. Of course, separation is another option based on page results, but it is error prone and risky as the document may be incorrectly separated. Often this is not at all necessary but it is sufficient to structure and digitise the document page-wise to achieve the process goals intended.

Page classification requires a solid infrastructure and understanding of physical documents. We provide this with the Laera Classification Framework that inherently understands structured documents.

Going even further would be paragraph and sentence classification but this will be a topic for another article. In Laera you can simply define a page classification scheme alongside the document classification. And you can even use the page classification results to determine the document type (e.g. by majority rule or by priority rule).

One example is a real-life project that has been in production since more than a year. In this case the customer receives thousands of car insurance claims per day. These are 10 to 50-page documents that contain all different kind of pages, for example:

- Covering letter or e-mail
- Lawyer's letter
- Expertise
- Calculation of repair
- Declaration of Assignment
- Photos

Laera Classifier is able to automatically determine all of these types with a rate in the high 90%.

Photo detection tags all photos and hides them for the following recognition steps as they are otherwise unnecessarily blocking OCR and extraction steps. The page classification results allows the user to structure and reorder the document in an optimal way for subsequent extraction of data from the different page types.

Being able to define specific extraction for each page type leads to a significant increase in extraction quality and speed. It also greatly eases the task for the clerks in the subsequent process steps as they already receive a structured document (in this case a PDF that is assembled) with tags and always in the same order.

By this means page classification plays an important role in streamlining the process getting a bit closer to the way how a person would look at the document and work from it.

*(Reposted from the Skilja blog at <http://www.skilja.com/>. Alexander Goerke is the founder of Skilja, a German company that actively works in producing software for document understanding.)*



# What should Australian companies be doing right now to protect our privacy

By David Glance

**Australians are increasingly concerned about how companies handle their personal data, especially online. Faced with the increasing likelihood that this data will be compromised, either through cyber attacks or mishandling, companies are now being forced into a more comprehensive approach to collecting and protecting customers' personal data. The question remains - what is the best approach to achieving this goal?**

The Organisation for Economic Co-operation and Development (OECD) has proposed that instead of talking about cybersecurity - companies, organisations and nations should be viewing the problem from a digital security risk management perspective.

Cybersecurity often overlooks risks to data that have nothing to do with a "cyber" element, even if people could agree on a definition of that term. In the case of Edward Snowden for example, he used a colleague's credentials to access the system and copied files to a USB drive.

Digital security risk management involves getting everyone in an organisation to see digital risk as part of the overall risks that the organisation faces. The extent of risk any organisation is willing to take in any particular activity depends on the activities value. The aim is to manage the risk to a level that is acceptable to all parties.

What do you do about the weak link: humans? It is worth remembering that in the case of the Equifax breach in which the personal details of up to 143 million customers in the US were leaked, it was largely human errors that were to blame.

Put simply, the person who was responsible for applying the patch (a piece of software designed to update a computer program or its supporting data, to fix or improve it) simply didn't do their job. The software that was supposed to check whether the patch had been applied also failed to pick this up.

Until humans can be taken out of the equation entirely, it is almost impossible to remain entirely secure, or to avoid the inadvertent disclosure of personal and private information.

Insider threat (as this type of risk is known) is difficult to combat and companies have tried various approaches to managing this risk including predictions based on psychological profiling of staff.

Automation and artificial intelligence may be a way of achieving this in the future. This works by minimising the amount of sensitive information staff have direct access to and surfacing only the analysis or interpretation of that data.

## A litany of recent breaches

If you needed convincing about the vulnerability of personal data on the Internet, you only need look at Gemalto's data breach website or DataBreaches.net. The breaches of private and personal information don't recognise national boundaries with hacks of companies like Yahoo having affected 3 billion users, including millions of Australians.

Of course, Australian companies and organisations have also been involved with spectacular data breaches. Last year saw the Australian Red Cross expose 555,000 customer records online.

Of more concern was the Australian Department of Health had published online what they believed were de-identified records of Medicare and pharmaceutical claims of more than 3 million patients. Researchers at the University of Melbourne discovered that the "encrypted" doctor provider numbers could be decrypted.



Equifax sign on the floor of the New York Stock Exchange in New York, New York, USA, on 12 September 2017.

Whilst there are practical steps companies can take to protect digital systems and data, there are more fundamental questions companies should be asking from a risk perspective. In order to navigate these questions, companies need to understand the data they collect and perhaps surprisingly, this is something most companies struggle to do.

The 13 Australian Privacy Principles from the Office of the Australian Information Commissioner outline the basics of how organisations and agencies should handle personal information. The practical application of these principles involves an approach called Privacy By Design for all applications and services companies offer.

For CSIRO's Data61, the answer to breaches of this sort is "confidential computing". Data61 is tasked with data innovation and commercialisation of its research ideas. Confidential computing is the remit of Data61's latest spin-off, N1 Analytics.

The main aspect of confidential computing involves keeping data encrypted at all times and using special techniques to be able to query data that is still encrypted and only decrypting the answer. This can even allow others outside an organisation to query internal data directly or link to it with their own data without revealing the actual underlying data to either party.

Aside from the case of allowing the use of sensitive data in research, this approach would allow a company with financial information say, to share this data with an insurance company without handing over sensitive information but theoretically letting the insurance company carry out extensive data analytics.

## What companies should do now

As a starting point, Australian companies should only collect the minimum of personal information that the business actually needs. This means not collecting extra information simply for marketing purposes at some later date for example.

Companies then need to explain in simple, clear, terms why information is being collected, what it is being used for and get users to consent to giving that information.

Companies then need to secure the data that is collected. Security involves dedicated staff understanding the data that is kept by a company and taking responsibility for its physical security and for controlling who has access, when they have access and what form they can access the data.

Lastly, they need to understand and enact a risk management approach to all digital data. This means that this is part of the overall culture of the company for every employee.

*David Glance is Director of the UWA Centre for Software Practice, University of Western Australia. Originally published on The Conversation.*

# The Changing Global Data Protection Landscape

Cybersecurity company McAfee has a new report, *Do You Know Where Your Data Is? Beyond GDPR: data residency insights from around the world, which highlights businesses' approach to data residency, management, and protection in light of global events, policies and the changing regulatory data protection landscape.*

Based on a survey of 800 senior business decision-makers from across multiple industry sectors and eight countries, the report provides a comprehensive view of how organisations view 11 key data regulations from around the world, including the E.U. General Data Protection Regulation (GDPR), which will toughen and simplify laws protecting personal data for over 500 million people residing in the European Union from May 2018.

The report shows that 48 percent of organisations will migrate their data to a new location because of regulations like GDPR. A similar amount will migrate their data because of changing geopolitics or the approach to relevant policies in the United States. 70% of respondents believe the implementation of GDPR will make Europe a world leader in data protection; however, the US remains the most popular data storage destination, preferred by nearly half of all organisations surveyed.

Some key findings from the report include the following:

- Privacy sells: Data protection delivers commercial advantage. Seventy-four percent of respondents believe organisations that properly apply data protection laws will attract new customers.
- Regulations and policies present barriers to technology acquisition and investment: Approximately two-thirds of re-

spondents say that GDPR (66 percent), U.S. policies (63 percent) and Brexit (63 percent) either already have or will impact their organisation's technology acquisition investments, while approximately 20 percent don't yet know how these issues will impact their spending. More specifically, 51% of all respondents say their organisation is being held back from technology investment because of external data protection regulations.

- Public opinion key to data decision-making. Eighty-three percent of organisations take public sentiment towards data privacy into account when making data residency decisions.
- Organisations take 11 days on average to report a breach.
- Organisations put faith in cloud service providers. Eight in 10 respondents' organisations are planning, at least in part, to leverage their cloud service provider to help achieve data protection compliance.
- Most organisations are 'unsure' of where their data is stored. Only forty-seven percent of organisations know where their data is stored at all times. The majority are unsure, at least some of the time.
- Only two percent of management really understand the laws that apply to their organisations.

While global events and a tightening of data protection rules gives senior decision-makers pause when determining their company's technology investment, most organisations look to store their data in those countries with the most stringent data protection policies.

To to view the full report, visit: <http://bit.ly/2wiOp6N>



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## ABBYY

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ABBYY is a leading global provider of technologies and solutions that help businesses to action information. The company sets the standard in content capture and innovative language-based technologies that integrate across the information lifecycle. ABBYY solutions are relied on to optimize business processes, mitigate risk, accelerate decision making and drive revenue. Thousands of companies process more than 9.3 billion pages of documents and forms annually using ABBYY technologies. ABBYY solutions and products are used by many of the largest international enterprises and government organizations, as well as SMBs and individuals.

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.

## Information Proficiency/Sigma Data

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Web: [infoproficiency.com.au](http://infoproficiency.com.au)

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

Our focus is on implementing efficient processes critical to enhancing productivity, improving transactional speed, reducing costs and achieving regulatory compliance for your organisation.

We supply and support Records and Content Management software and solutions that improve business processes, as well as our range of leading productivity and connectivity tools. We work hard to understand our client requirements and implement solutions to match.

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.



## EzeScan

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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.



## ABBYY

## DocsCorp

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DocsCorp is a leading provider of productivity software for document management professionals worldwide.

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.



## Objective

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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.



## Brother

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Web: <http://corpsolutions.brother.com.au/>

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

Committed to the advancement of printing and scanning technologies, Brother also offer business solutions designed to fit perfectly in the SOHO, SMB, SME and corporate environments. With a skilled team specialising in assisting their customer's corporate growth, Brother's business categories such as portable printers and scanners, commercial desktop scanners and high volume corporate printers can help businesses achieve in any industry.

With resellers located Australia-wide, readily available product and a locally based product support team, Brother is always 'at your side'.

Contact the Brother Commercial Division today to find the best solution for your business requirements.





## Kodak Alaris Information Management

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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, visit [www.kodakalaris.com/go/IMnews](http://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.

## Fujitsu Australia

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

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

## FileBound

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FileBound is an end-to-end process automation solution for enterprises of all sizes. FileBound is a cloud-native document management system with advanced workflow capabilities that automates the flow of enterprise work. This comprehensive enterprise content

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

## OPEX

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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 online document workflow. A high quality scanner is a powerful tool. For unbeatable reproduction of photographs, documents and graphics, you can't do better than the Epson scanner range - outstanding results, simple operation and value for money.

## UpFlow

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PSIGEN, PSICapture is an innovative document capture platform engineered to combine automation, efficiency, stability and Enterprise-class scalability. PSICapture provides unmatched integration with just about any ECM or ERP platform [e.g. SharePoint, Xero, Trim, Objective etc.] and allows the utmost in flexibility for deployment in large or small organisations. Whether you want a simple scan workflow or complex document capture, PSICapture provides a solution to meet your specific needs. Document Capture and Scanning is a challenge in any organization. With an array of scanning devices, capture needs and backend content management systems, it is ineffective to settle for multiple applications to accomplish one goal. PSICapture provides a single capture platform that can meet all the needs of an organisation. UpFlow is the Asia Pacific distributor for PSIGEN, PSICapture.

## Kodak Alaris Unveils new scanner range



Kodak Alaris is expanding its information capture ecosystem with the launch of the Alaris S2000 Series – a new family of network/wireless and USB-connected desktop scanners.

The new Alaris S2000 Series increases productivity by automating much of the work traditionally done by people and host computers. The addition of Embedded Image Processing within the scanner delivers crisp, clear images without requiring a high-powered (or expensive) host PC.

New Active Feed Technology aligns the leading edge of paper to avoid multi-feeds and misfeeds, and Controlled Output Stacking places paper neatly in the output tray. Users benefit from spending less time preparing documents for scanning and dealing with messy output stacks.

The S2000 Series includes two USB-connected models (Alaris S2050 (pictured above) and S2070) and two network/wireless models (Alaris S2060w and S2080w) which deliver rated speeds between 50 and 80 pages per minute (ppm). Each scanner is compact, powerful, and easy to use with a robust feeding system that efficiently handles a wide range of media.

Three optional flatbed accessories can be integrated with the scanners for increased versatility and productivity. For example, the S2000 Series is designed to 'dock' on top of the new Alaris Passport Flatbed Accessory, offering a quick and easy solution for scanning passports, ID cards and other small, fragile documents.

A new generation of software from Kodak Alaris offers flexible and powerful batch capture for a wide range of industries and vertical markets, and is designed particularly for BPOs and centralised mailrooms.

Alaris Capture Pro Software v5.5 is a dedicated workstation-based information capture solution that does not depend on internet connectivity for scanning and processing. It seamlessly delivers information to databases and applications, including Enterprise Content Management (ECM) systems and Microsoft SharePoint Online (Office 365). Alaris Info Input Solution and Info Input Express are web-based and mobile capture applications that are easy to implement and use for workers who regularly scan across departments and enterprises. Info Input Solution and Express enable effortless information capture from scanners, smart devices (via mobile app), and digital files (including email) from one application. Info Input Express Limited Edition is bundled with every S2000 Series Scanner.

For further information or to request a demo of the Alaris S2000 Series Scanner, contact: Francis Yanga. Email: [francis.yanga@kodakalaris.com](mailto:francis.yanga@kodakalaris.com) Tel: 1300 ALARIS (1300 252 747).

## Accusoft Launches New No-Code Workflow Designer for OnTask

Accusoft has announced the launch of a new no-code workflow designer for its web-based business process automation software OnTask. The workflow designer allows companies to easily and quickly build custom business processes that automate all of the tasks in the process, without coding or the assistance of IT.

"Workflow and business process management softwares have traditionally been too technical and complex for the everyday process owners—they need an easy-to-use alternative," said Jack Berlin, CEO of Accusoft.

"With OnTask's no-code workflow designer, we have empowered end-users from the Director of Finance to the HR Coordinator to create and deploy their unique processes."

OnTask offers features like workflow automation, digital signatures and forms automation for users to manage content electronically, all of which can be customised to each company's unique document management needs.

The web-based business process management tool can integrate seamlessly with CRM and document management systems to increase efficiency, productivity, and reduce manual entry errors. Its automated workflow processes eliminate process bottlenecks and reduce costs associated with manual business processes. Now, users can create and deploy customised workflows that go beyond signing to meet their unique business needs.

"Entering an IT or development ticket to create or edit workflows is not the best use of resources," said Todd Neal, OnTask product manager. "Having to go through several requests to make a simple edit or change to a workflow becomes a hindrance to the timely completion of business processes. OnTask's no-code workflow designer puts the design ability where it should be – the process owner's hands."

<https://www.ontask.io/>

## Acronis updates Mobile Data Sharing

Acronis has announced the availability of Acronis Access Advanced 8.0 — the latest version of mobile file access, sync & share solution for enterprises. Acronis Access Advanced 8.0 introduces new features designed to increase security, compliance and convenience protecting shared data. It also extends flexibility of integrating with other mobile applications.

The new features include Web-based file editing with Microsoft Office Online, simultaneous editing of documents by multiple users, extended sharing using nested folders with independent permissions, support for Microsoft Intune Mobile Application Management (MAM) without Intune MDM enrollment, allowing Intune app management with any MDM solution, and ZIP archive creation features inside the iOS app.

Scuderia Toro Rosso Formula 1 Team uses Acronis Access Advanced to share confidential telemetry data and R&D documents between the factory, trackside engineers and sub-contractors. Acronis Access Advanced simplifies the management of shared data while meeting the strictest requirements for secure file sharing. It also removes the risks associated with using public file sync & share services, such as inability to choose data storage location or monitor

New features include:

- Safe editing of sensitive documents with Microsoft Office Online, without downloading them to endpoint devices
- Collaborative co-editing of documents
- Microsoft Intune MAM independent from MDM support
- Extended flexibility when syncing and sharing folders
- Ability to create ZIP archives in the Acronis Access iOS app

<https://www.acronis.com/en-us/mobility/access-advanced/>

## AvePoint Debuts SaaS Records Management Solution for Office 365

AvePoint showcased its online records management solution AvePoint Cloud Records during this year's Microsoft Ignite conference in Orlando, Florida, September 25-29. Cloud Records automates tasks associated with information classification, retention, and disposal, as well as auditing and physical records management from a single, intuitive interface.

AvePoint Cloud Records is a new Software-as-a-Service (SaaS) platform for SharePoint and Office 365 that makes it simple for information and records managers to manage Office 365 content and physical records to reduce risk and maintain compliance. Cloud Records safeguards records for the entirety of their lifecycle and ensures continuous integrity of records with comprehensive auditing.

"We're excited about offering Cloud Records on a global scale after seeing almost a year and a half of success with the on-premises version in our Australian market," said AvePoint Senior Vice President of Product Strategy, John Peluso.

"No organisation has the luxury to rest on the assumption that how they manage their information is acceptable. We designed Cloud Records to ensure that an organisation's application of industry regulations, rules, and policies are as painless as possible."

With Cloud Records, organisations can quickly and easily apply rules to adhere to ever-changing business or legislative mandates without disrupting established processes or information architecture. Cloud Records also improves document management, helping business users quickly find the content they need to do their jobs and make sound decisions based on current and accurate information.

Records and information managers can manage both electronic and physical information – including records, files, folders, boxes, and locations – from a single pane of glass. Out-of-the-box reporting allows organisations to become more proactive in identifying and solving issues and ensuring compliance.

<https://www.avepoint.com/products/office-365-services/office-365-records/>

## BA Insight makes search smarter with SmartHub

BA Insight, a developer of enterprise search solutions, has introduced SmartHub, which leverages the latest cloud-based search and cognitive computing services from Microsoft, Google, and Elastic.

"Cognitive search, and indeed, the entire new wave of cognitive applications, are the next leap forward in information access. These apps rest on a search backbone that integrates information, making it findable and usable. Companies such as BA Insight are now able to not only provide better search results,

but also uncover patterns and solve problems that traditional search engines can't," said Sue Feldman, Co-Founder and Managing Director at the Cognitive Computing Consortium.

"There's a cognitive technology race going on between the big software superpowers, which are developing platforms on which these applications are built. Smart smaller vendors go the next mile, layering highly integrated, well designed, purpose-built applications on top of multiple platforms so that enterprises can leave their information environments in place while adding in the AI, machine learning, and language understanding that gets them greater, faster insights." A cloud-based application that can be used alone or in combination with other products in the BA Insight Software Portfolio, SmartHub supports:

- Azure Search, Elasticsearch (Elasticsearch on-premise and Elastic Cloud), and SharePoint search (SharePoint Online, SharePoint 2013, and SharePoint 2016)
- Cognitive image processing using Google Cloud Vision or Microsoft Azure Computer Vision to find objects, themes, and text from photos and illustrations in image files or embedded within documents
- Machine Learning-based personalisation and recommendations using behavioural data with BA Insight's Smart Analytics
- Personalised, dynamic views of related data such as "new documents related to my projects", "people involved in today's meetings", or "research drafts relevant to my clients' portfolio"
- Simultaneous access to content from over 60 enterprise systems (such as Box, Jive, Veeva Vault, iManage, and Confluence) using BA Insight connectors
- A complete set of search controls using metadata from BA Insight's AutoClassifier

The cloud-based UI provides many features including visual refiners, intelligent type-ahead, and configurable results presentation.

- Personalized and Relevant Information Delivery : unique Dynamic Query Modification taps into each user's context to provide personalized dashboards and highly relevant results.
- Support for Multiple Platforms lets users choose the best search engine and cognitive services for the job, or mix-and-match to handle a wide range of applications.

"SmartHub is a key step in our strategy of delivering intelligent search that is proactive, interactive, connected, and extensible," said Jeff Fried, BA Insight's CTO.

"But I'm particularly proud that we could release a quality product within a few weeks of Google and Microsoft's updates to their vision services, and within days of Elastic Cloud's Beta availability on Google Cloud."

<http://bainsight.com/>

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## Cloud-Based Solution for Integrated Cable Testing and Labelling



Brother International (Aust) has licensed Fluke Networks' LinkWare Live API to create iLink&Label, claimed to be the first mobile app and back end solution designed to dramatically streamline the network and cable labelling process. Built on Fluke Networks' LinkWare Live platform, the new solution leverages the latest developments in cabling certification testing technology and advanced mobile printing capabilities to deliver speed, efficiency and accuracy to the cable ID and labelling process – a discipline which continues to grow in scope, complexity and urgency as data centres evolve. Electrical construction and engineering contractors can now meet multiple project needs for cable ID by inputting data only once. Here is a snapshot of how it works:

- In the office, the systems designer uses CAD to plan the network infrastructure, and then uploads cable ID and component identifiers to LinkWare Live, Fluke Networks Cabling Certification tester and report management application
- Contractor downloads and installs free iLink&Label app
- On the jobsite, the contractor or technician downloads the identifiers from LinkWare Live through a smart phone into a Brother PT-E550WVP industrial labelling tool, which is used to create and print high-quality, standards-compliant laminated labels
- On the jobsite, the contractor or technician also downloads the same identifiers into the Fluke Networks Versiv Cabling Certification System, performs the tests, and uploads testing results for each identifier using LinkWare Live

Basically, this means that the cable identifiers and test results for each project can be stored in one place and can be retrieved and used as many times as needed.

Michael Morales, Product & Business Planning Manager at Brother International (Aust) Pty Ltd, notes: "Brother created an app for our PT-E550WVP label printer that interacts seamlessly with the cloud ID data file, so installation workers can instantly access the relevant cable identifiers and create and print labels without the need for additional data entry."

The Brother PT-E550WVP (\$A329) is a compact, full-featured industrial labelling tool featuring wireless connectivity for transferring data and printing directly from mobile devices. It can print wider labels (up to 24mm wide) - including heat shrink tube - and is ideal for labelling large, complex IT network projects.

<http://corpsolutions.brother.com.au/>

## Cambridge Semantics Launches Anzo Smart Data Lake 4.0

Cambridge Semantics, a provider of big data management and analytics solutions, has announced the release of Anzo Smart Data Lake (ASDL) 4.0, its flagship platform product that builds a semantic layer at scale on all enterprise data.

The platform is designed to break down the IT barriers that can cost enterprises millions of dollars in lost opportunities by slowing down or blocking data access.

ASDL 4.0 features include:

- Automated Rapid Ingestion that supports connectivity to both internal and external sources, including cloud environments and existing data lakes. It ingests both structured and unstructured data through horizontally scaled, automated ETL processes. Most structured sources may be ingested without manual mapping, while unstructured data is processed, indexed and on-boarded through configurable text analytics and NLP pipelines. As a result, valuable analyst or data steward's time can be refocused on higher value tasks.
- Data Catalog leverages graph models to describe the data in business contexts and capture all the different types of data required, spanning all enterprise data sources and all data sets stored in ASDL. Users can easily browse and discover data sets of interest and understand their context in a secure and governed environment. The full data provenance and lineage of all data in the catalog is explorable in a user-friendly visual interface.
- Graphmarts connect the power of Cambridge Semantics' Anzo Graph Query Engine (AGQE) to data in ASDL, bringing together subsets of data on-demand for preparation, analysis and access. Graphmarts are collections of data sets that can be shared, discovered and enhanced collaboratively. ASDL automatically brings Graphmarts online into existing AGQE clusters, or can provision new clusters on-demand as business needs peak for agile deployment and cost-effective cloud resource utilization.

[www.cambridgesemantics.com](http://www.cambridgesemantics.com)

## Patent for Structured and Unstructured Data Analytics

Ez-XBRL Solutions, Inc. has been issued a third patent by the US Patent Office. This is an additional patent awarded to the company's earlier patent for a system that facilitates associating structured content in a structured document with unstructured content in an unstructured document.

"This technology is used in our Contextxia product and represents a significant step towards utilizing structured XBRL data in association with the underlying textual document. Contextxia enables a sophisticated way to creating transparency in unstructured and structured data such as those used in SEC regulatory filings. Contextxia uses the techniques in this patent award that utilize natural language processing, semantic techniques, and XBRL data to offer a unique, holistic view to analyzing the data," said Srinivas Murty, Vice President, Ez-XBRL. Contextxia's use of multiple Natural Language Processing (NLP) techniques and algorithms enables the enhanced analysis of textual and XBRL content in documents and related data.

"Contextxia not only leverages its three powerful views to provide transparency in SEC filings, it also enables high quality analysis with much less effort and cost," said Mr. Murty.

A variety of users including equity research analysts, law firms, corporations, accounting firms, and regulators, have been using Contextxia since its release in 2014.

[www.ez-xbrl.com](http://www.ez-xbrl.com)

# How Information Management Trends Impact Transportation and Logistics

By Henry Patishman, Director of Sales for Australasia at ABBYY

**The transportation and logistics industry is undergoing a fundamental transformation as a consequence of increasing customer expectations, innovative use and adoption of new technologies and the explosion of data and devices. The growing importance of data coupled with the need to have real-time information on the state of the business has become the biggest challenge for the industry.**

The new information management paradigm requires industry executives to capitalise on the ongoing wave of digital transformation in order to provide value-added services to customers and streamline business processes. Despite digital disruption's potential to overturn incumbents, digital transformation provides significant opportunities for accessing, extracting and understanding data and putting the data we know into action.

For transportation and logistics companies, innovative application of information management can offer ample opportunities. At ABBYY, we have been successfully assisting T&L companies in ANZ and around the world through this process, helping them reap immediate benefits without delays or extra costs. We have worked with businesses ranging from small private operations to the largest global T&L companies. Here is what we have learned.

To succeed in today's data-driven, real-time economy, transportation and logistics companies require quick access to data. Digitisation of core transportation and logistics processes enables integration of data from different sources with different formats and improves the accessibility of meaningful data in the desired format.

Digitising back office processes and automating back offices, for instance, leads to cost savings on levels such as document management systems and information management.

Moreover, back office digitisation removes the inevitable costs of manual labour and paper-based processes such as track and trace, gathering freight bill information, managing custom forms, or securing proofs of delivery.

Speed and timing remain the key drivers of change in transportation and logistics. IoT technologies allow carriers to transmit vital stats, such as temperature, location, and power supply via satellite.

According to the Global Connected Logistics Market 2016-2020 research, "the use of advanced IT solutions such as Internet of

Things, Big Data analytics, cloud computing, and remote temperature monitoring systems have revamped logistics services." By having this information sent to the cloud and analysed at a central office, carriers have realtime information as issues develop that also leads to increased safety for port staff.

Automation along with standardisation of the structure and content of data interchanges is key to achieving end-to-end supply chain visibility, speeding up processes, and digitising value chains.

Fragmented visibility due to paper-based proof of delivery (POD) documents, missed shipping dates, expediting issues, and other bottlenecks can play a role in driving up costs and disappointing customers. Having better visibility into processes can improve shipment times and minimise supply chain disruption while enabling managers to monitor shipments and respond with greater speed and agility.

As supply chains face increased challenges from geopolitical tensions to technological risks and new economic crises, the potentials for supply chain disruptions are greater than ever before. Innovative information management should help supply functions cope with these challenges, both in planning and designing supply chain operations, and in the movement of goods. Having access to global information and applying it locally is a critical asset to minimising crises.

The growth in the number of on-demand services is impacting the T&L industry, rendering the last mile more fragmented.

The ubiquity of autonomous vehicles, networks of sensors, warehouse management software, drones, and intelligent robots appear to contribute to the complexity.

Cloud platforms and crowd sharing startups are also collaborating with incumbents to complement their services. These disruptions to the last mile as we knew it require speed in accessing accurate information.

The huge amounts of data resulting from new technologies, mobile and cloud computing and adoption of GPS, RFID tags, sensors, scanners have made collaborative business intelligence (BI) an attractive proposition for transportation and logistics companies.

Data analytics provides powerful means of gaining foresight and delivering it swiftly for efficient and effective decision making. T&L companies can use analytics to better understand their digital initiatives, business processes, and customers' challenges and transform that data to anticipate future needs and expand value to customers.





## Brother releases powerful new desktop document scanner



Brother International Australia has introduced a new model to its desktop scanner range; the Brother ADS-2200.

The ADS-2200 replaces the ADS-2100e as an affordable, easy to use desktop scanner aimed at the business scanning needs for SMBs and SOHOs.

It offers a 50-sheet Automatic Document Feeder (ADF) to handle diverse and high-volume scan jobs while remaining compact enough to be used in small workspaces, front of house counters and office desktops where space is often limited.

Whether it's a double-sided contract, small receipt, an embossed ID card of up to 1.32mm thickness, or a 5000mm long paper, Brother's ADS-2200 has the capability to be loaded with mixed sizes and weights.

"The new ADS-2200 Desktop Scanner is engineered to be reliable and affordable while enhancing business productivity and efficiency over the long term," says Stefanie Dixon, Marketing Manager, SMB at Brother Australia.

Brother drew on results of 2016 scanner purchase motivation research when developing the ADS-2200. This research revealed that end user key purchase motivation factors included ease of use, speed / efficiency when completing tasks and quality assurance.

Features include:

- Fast 35 pages per minute/70 sides per minute 2-sided (duplex) colour scan speeds
- Diverse paper handling (including receipts, plastic ID cards and 5000mm long paper)
- 50-sheet Automatic Document Feeder (ADF)
- Scan to searchable PDF, file, email, OCR, image and USB host drive
- Hi-speed USB 2.0 for easy connectivity to computers and laptops
- Clear scanning at up to 1200x1200dpi (interpolated) resolution
- Includes trusted document management and business card software for Windows/macOS

The ADS-2200 is available now for \$A499.

<http://corpsolutions.brother.com.au/>

## Adobe Sign embedded into the Microsoft cloud

Microsoft has integrated Adobe's e-signature solution, Adobe Sign, with its chat-based workspace, Microsoft Teams in various cloud platforms, namely Microsoft Azure, Office 365 and "Dynamic 365, Adobe Marketing Cloud.

Adobe Sign is now the signature tool for all the Office products. In Microsoft Teams, the tool is used to sign documents sent via a signature tab

Adobe Sign for Microsoft Dynamics and Microsoft SharePoint is already available.

Adobe Sign integration for Microsoft's Teams, Flow, Microsoft Word, PowerPoint and Outlook are expected to come in a few weeks, along with integration between Adobe Creative Cloud and Microsoft Team.

"Adobe and Microsoft are working together to redefine what the modern enterprise experience looks like with collaboration, identity, data and intelligence at the core," said Abhay Paranis, chief technology officer, Adobe.

According to the press release, Microsoft Teams may expand to Adobe Experience Cloud as well.

## SharePoint Connector adds secure enterprise video to SharePoint

A new SharePoint Connector for the movingimage Enterprise Video Platform (EVP) promises to make it easy to integrate, manage, share and stream video everywhere within SharePoint – from sites to Wikis. Videos can even be embedded in every rich text field.

The movingimage secure EVP provides responsive player technology, intranet streaming and enterprise-grade security out of the box. And because videos are securely hosted and always available within the EVP, on-demand videos can be viewed within SharePoint – by hundreds of thousands, or even millions, of people at once – without concern about network bandwidth.

Oliver Jaeger, global vice president of marketing for movingimage, said "Together with the Outlook and PowerPoint add-ins we announced in June, these solutions are designed to make it easier than ever to communicate, collaborate and drive employee engagement using secure, enterprise video."

With the movingimage secure EVP, all videos – both internal and those on external websites – are hosted securely in one place, enabling them to be saved once and served up across multiple channels, including SharePoint. The EVP lets administrators, editors and publishers keep track of which videos are online and which are unpublished; and when videos are edited, the EVP automatically updates the video across every channel.

The movingimage EVP provides enterprise-grade video security features that work seamlessly with SharePoint, including single sign-on, IP-level security and encrypted streaming – keeping confidential videos confidential. And for those companies that require an extra layer of protection, videos can specifically be hosted in European data centres that are subject to European data protection regulations.

The SharePoint Connector for the movingimage secure EVP supports multiple SharePoint versions, including: SharePoint 2013 Foundation, Standard and Enterprise; SharePoint 2016 Standard and Enterprise and SharePoint Online / Office 365.

Movingimage utilises the Akamai CDN and EVP-integrated eCDN solutions from Hive and Ramp. Whether hosted on-premise, online or deployed as a hybrid solution, Akamai solves the delivery of videos to the internet with its 200,000 servers, while Hive and Ramp take care of intranet bottlenecks.

<http://www.movingimage.com>



## Combining Claims Processing with X-ray Scanning—How Hard Can It Be?



**Anyone who has experience will tell you that automating insurance claims with X-ray scanning is a multifaceted and time-consuming process. Dental claims include a number of different forms, supporting documentation and patient X-rays, all of which must be properly classified, sorted, scanned and filed.**

The X-rays come through as high-resolution prints and also as film X-rays. Digitising film X-rays requires a separate process with highly technical and expensive equipment. The process also includes added work to apply barcode labels to track those X-rays and their associated claims documents.

Dentegra is a specialist provider of Dental Insurance plans in the US. It serves enrollees in both commercial and government-sponsored programs. Recently, it successfully implemented a combined solution from OPEX Corporation and service bureau Mavro Imaging to automate its commercial claims process.

With this success under their belt, Dentegra turned its attention to a more ambitious automation project: improving claims processing for a large government client.

The high volume of claims processed through this program not only includes the usual mix of claims documentation but also a much larger volume of X-rays. The X-rays come through as high-resolution prints and also as film X-rays. Dentegra processes as many as 25,000 claims daily for this client alone.

### The X-ray Challenge

While the document processing component of the solution would function for this government client just as it did for Dentegra's commercial claims, X-ray film presented a significant challenge. Under the existing processes, the X-rays (which could not be scanned on a traditional scanner) were physically separated from the claims documents, then organised and stored separately. To match the documents, staff used barcode labels on the X-rays and claims documents. X-rays were then filed in a separate storage area. If an adjudicator needed to see the X-ray later, a request was placed for the film. Staff then had to search the X-ray files for the matching date to find the films, which took a significant amount of time.

In order to successfully automate claims processing for this operation, Mavro and OPEX had to develop a way to automatically scan film X-rays using OPEX Falcon, the universal document scanning workstation. The combined OPEX and Mavro team collaborated closely to develop a workable solution that would allow Dentegra to automate the scanning and

"We're no longer processing paper and X-rays separately and then matching them later on. Now it's all done in one transaction." - Francoise Thimon, Manager of Consolidated Mail Services of Dentegra

batching of X-ray film in a way that would not disrupt the claims scanning operation.

Operators pull contents from each envelope and drop them onto the Falcon scanner rollers. Falcon 'singulates' the contents and scans the documents. To solve the problem of scanning and batching the X-ray film, OPEX and Mavro incorporated a light table on the scanner and attached a separate camera protected from glare using a specially developed shield.

Printed X-rays are scanned by the Falcon scanner in high-resolution colour. Film X-rays are pulled from the envelopes and placed beneath a Canon SLR high-resolution camera that is mounted to the Falcon scanner and positioned above the light table. A companion application developed by Mavro allows the operator to take an image of the X-ray and include it with the other documents associated with the claim.

"We can scan not only paper X-ray prints but also high-quality film X-rays," says Francoise Thimon, Manager of Consolidated Mail Services, Dentegra. "We don't have to sort documents manually because the intelligence behind the scanning equipment can do that for us."

### Enough To Make You Smile

In addition to the labour-saving, efficiency, and employee satisfaction benefits realised on the commercial side, the government client operation has also experienced an improvement in the adjudication process. This is because adjudicators no longer have to request and then wait for the X-ray film. The images are immediately available, as are all documents (in some cases, this can even include an image of the original envelope).

"The solution was revolutionary for us," Thimon says.

"Automatically sorting and batching the documents is much faster than our manual processes. We're no longer processing paper and X-rays separately and then matching them later on. Now it's all done in one transaction."

Intelligent claims processing has made it possible for Dentegra to improve efficiency and reduce manual labour. Now that the solution for the government program is up and running, Dentegra has plans to expand the OPEX/Mavro system to its claims processing operation for other government clients.



# How to Tackle Dark Data

By Sony Shetty, Gartner

**Most of us are guilty of “data hoarding”. Without a thought, we save every digital photo, email, document, presentation and spreadsheet, losing track of what we have saved along the way. Across the enterprise, employees are blindly building a bottomless lake of data, and, in many cases, a corporate mantra of “save everything, just in case” is encouraging the behaviour.**

Email, instant messages, documents, ZIP files, log files, archived web content, partially developed and then abandoned applications, code snippets ... all of this is now termed “dark data”.

Gartner defines dark data as “the information assets organisations collect, process and store during regular business activities, but generally fail to use for other purposes.” It includes all data objects and types that have yet to be analysed for any business or competitive intelligence or aid in business decision making.

“Increased data growth over the past decade has created an unstructured data nightmare,” says Alan Dayley, research director at Gartner. “It’s not just the cost to store it. Huge volumes of dark data make it harder to find what is useful and may mean we miss business opportunities.”

Gartner predicts that through 2021, more than 80% of organisations will fail to develop a consolidated data security policy across silos, leading to potential noncompliance, security breaches and financial liabilities.

To effectively manage data growth and security, information managers will need to deploy the right tools, and educate employees on how to overcome instinctual data hoarding.

## The dark data opportunity

Operational data that is left unanalysed can now be used as an economic opportunity for companies. They can look at using this data to drive new revenues or reduce internal costs.

Some examples of data that is often left dark include server log files that can give clues to website visitor behaviour, customer call detail records that can indicate consumer sentiment and mobile geolocation data that can reveal traffic patterns to aid in business planning.

“No matter which types of dark data your organisation collects, or how it is stored, the key to keeping data out of the dark is to ensure that you have a means of translating it from one form to another and ingesting it easily into whichever analytics platform you use,” says Dayley.

Generating large sums of data that serve nothing is useless knowledge. Whoever unlocks the reams of data and uses it strategically will win.

Dayley’s recommendations for organizations to manage dark data are:

- Start today. This is only going to get worse — don’t wait for that unsavoury catalyst.
- Reach out to all stakeholders and then trim involvement of unnecessary but interested parties.
- Take action — Move the data, secure the data, create accessibility to the data or delete the data, depending on the desired business outcome.

*Upcoming dates and locations for Gartner Symposium/ITxpo are: October 30-November 2, Gold Coast, Australia*



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