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TechnologyOne wins DIIS shared services

TechnologyOne has won another federal government contract for its enterprise Software as a Service (SaaS) offering, securing a second shared service hub with the Department of Industry, Innovation and Science (DIIS).

DIIS is the second Shared Service hub to partner with TechnologyOne, under the Federal Government's Shared Service Strategy, following the Department of Treasury.

The two Shared Service hubs are expected to manage more than 40 Federal Government agencies.

Chief Financial Officer of DIIS, Mr Brad Medland, said TechnologyOne met the department's needs.

"We went to market seeking a flexible ERP solution that would enable us to provide Shared Service capabilities to other federal government agencies," Mr Medland said.

TechnologyOne's Chief Executive Officer, Mr Edward Chung said TechnologyOne expects to see substantial growth in coming years from its SaaS offering to State and Federal Governments.

"We already have six Federal Government customers on our SaaS solution who benefit from significant reductions in the time, cost and risks associated with large scale enterprise-wide software implementations.

Law Firm Allens Selects iManage Work

Allens – a prestigious global law firm based in Australia, serving 55 of the world's top 100 companies and more than 75 of Australia's top 100 companies – has selected iManage for Work Product Management.

"When we started our journey of selecting a replacement for our current system, we took a fresh approach with no bias for any vendor," said Bill Tanner, acting Chief Information Officer, Allens. "During our extensive evaluation of available enterprise-scale products, it became clear to us that iManage offered the most advanced solution for addressing our productivity, mobility and security needs."

iManage Work will replace Allens' existing document management system, providing document and email management to more than 1300 users. The firm also selected iManage Mobility to enable staff to access the entire electronic file from any device or location.

"iManage provides practical options for meeting the security

requirements demanded by our clients and, with 25 of the top 30 global firms using iManage today, they are also the most experienced and proven in working with firms of our size," said Rachel O'Connor, Chief Knowledge Officer, Allens.

"Given the quality of the overall user experience that iManage Work 10 offers and the integration with RAVN Systems, we anticipate rapid and broad adoption of iManage throughout the firm."

iManage partner Phoenix Business Solutions was chosen to assist Allens with the design and delivery of its iManage implementation.

British American Tobacco turns to OpenText Cloud

British American Tobacco (BAT) has deployed OpenText Extended ECM for SAP SuccessFactors as part of overhauling its HR processes and records management.

BAT employs more than 50 000 people in over 180 countries. The company's growth has resulted in a fragmented HR function managing a large and increasingly mobile workforce.

As part of its global transformation initiative 'Programme Aurora', BAT selected OpenText Extended ECM for SAP SuccessFactors to integrate with its single, global instance of SuccessFactors. BAT deployed the solution in the OpenText Cloud, principally in the European data zone.

"OpenText Extended ECM for SAP SuccessFactors was a natural choice for us. We can now manage employee files, letters, contracts and other documents in one place, providing global continuity as employees move around," said Andy Straw, IT program manager at BAT.

"For the first time, we have a single source of truth."

The roll-out of Programme Aurora focuses on modernising its HR function modelled around HR shared service centres at strategic locations around the globe.

This approach will produce an agile, integrated HR function and will allow BAT to realise cost savings and efficiency improvements for the whole organisation through standard, consistent HR processes, supported by powerful digital tools.

"A critical part of this project was improving our HR reporting. In the past, it could take three months to produce meaningful HR reports and analysis," said Straw.

"Even the most common of tasks, such as providing an accurate global headcount, could take months, by which time it was out of date. Now, we can produce key business reports, whenever we want, at the click of a mouse."

The OpenText solution has also helped deliver additional workflow improvements, such as the automation of key employee HR communications and better privacy and security controls. BAT currently has more than 20 000 employee records in the system, and is in the process of expanding it to cover over 50 000 HR files across the organisation.

DocuSign plans for local data centre

DocuSign has announced plans to open a Microsoft Azure-based data centre in Australia. Slated to come online early next year, it is intended that the data centre will meet the federal government's requirements for handling classified and sensitive data.

Microsoft confirmed in August that it planned to deliver Microsoft Azure from two new regions located within highly-secure data centres in Canberra.

"We have been encouraged by the government's clear drive to create a tangible shift to the digital world – and we want to play our part by ensuring we're here to serve the public and the private sector's eSignature and digital transaction management needs," said Brad Newton, APAC Vice-President, DocuSign.



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Objective Awards 2017 highlight Digital Innovation

A project by the Department of Planning, Lands and Heritage (WA) to digitise over 200,000 Crown Land information artefacts dating back to 1833 has been recognised at the annual Objective customer innovation awards.

The Digitisation project leveraged the department's Objective ECM to also automate all correspondence relating to 5,000 annual Crown Land Actions. It won the **Information Governance Award** thanks to its success in reducing the average time from 'request to outcome' by three months. Savings over the next five years are estimated to be \$A13 million.

Tony Walls, CEO of Objective Corporation, presented the winning customers with their awards at a Gala Dinner on the Gold Coast, as part of the annual Collaborate 2017 user conference.

"The Innovation Awards recognise the outstanding achievements of our customers who are leveraging Objective solutions in new and innovative ways to drive significant business improvements. It's exciting to see how our customers are harnessing the power of information to shape their digital transformation journeys," said Walls.

Primary Industries and Regions SA (PIRSA) won the **Collaboration Award** for their implementation of GDS21 and EzeScan integration with Objective. Already using Objective ECM, they built automated management for creating and closing Objective Connect workspaces with workflow from Objective ECM.

Workflow now actively searches for incoming documents and subfolders in Objective Connect, applies mandatory metadata and assigns privileges to manage workspace folders within Objective ECM. Governance for all information assets is assured, with FOI (Freedom of Information) determinations and associated documents now accessed more efficiently, within 15 minutes of notification.

In recognition of the partnership between Objective and Microsoft, Andrew Lawson, Microsoft's Next Gen ISV & Advanced Workloads Lead for QLD, presented the Department of Communities WA with the **Microsoft Award for Excellence**. This award recognised the Department's Objective ECM Upgrade project and implementation of Objective ECM for browser, workflow, Applink and Objective Connect.

Machinery of Government changes led to the newly formed Department requiring a central mechanism to manage Ministerial correspondence across four divisions. An Objective ECM 10.3 upgrade project commenced (across 12 environments) with high availability, standardised Ministerial workflow for all agencies, browser functionality for new users as well as an upgrade to Microsoft Server 2016 and Microsoft SQL 2016. Objective Connect with workgroups was also established.



Receiving the Information Governance Award at the annual Objective customer innovation awards from Tony Walls, CEO of Objective Corporation (l) are Pascoe Rechichi, Executive Director Corporate Services and Rachel Roy, System and Information Services Training Officer the Department of Planning, Lands and Heritage (WA).

The project has centralised the way correspondence is managed and processed, delivering greater efficiency across the entire Department.

The Process Governance Award was presented to Barwon Water for their web portal integration to manage inspection services with Objective ECM and Objective Connect. With an estimated 4000 bookings and 1500 installation inspections within 12 months, if done manually it was estimated that one full time resource was needed. Using the key functions of Objective ECM (Inform, Perform, Webtalk) combined with Objective Connect, Barwon Water instead created a web portal environment to digitise the booking process, ensuring all information is synced back into Objective ECM.

Three Certificates of Merit were also awarded:

Information Governance Certificate of Merit: awarded to Primary Industries & Regions SA (PIRSA) in recognition of their work on the PIRSA Intranet, Internet website and SharePoint document publishing initiatives

Process Governance Certificate of Merit: presented to Counties Manukau District Health Board (NZ) for their Contracts Approval Process

Microsoft Certificate of Merit: awarded to the Welsh Government (UK) for their Microsoft Azure Migration project.

"The Awards highlight the fantastic achievements of our customers and we are proud to share in their success and help deliver excellence in innovation," said Tony Walls.

Moreland goes SaaS with Open Office

The City of Moreland, a local government area in Melbourne, has selected a cloud erp solution from Australia's Open Office. The project which encompasses Finance, Payroll, Human Resources and other associated modules, will be implemented in the next 12 months. Council expects to achieve major cost savings by adopting an established Cloud solution.

Moreland Council will partner with Open Office to implement the business solution which will provide opportunities for internal process and workflow improvements.

The City of Moreland was created in 1994 during the

forced amalgamations of local governments by the Kennett Government, being created from the former local government areas of the City of Brunswick, the City of Coburg and the southern part of the City of Broadmeadows.

Established in 1990 and with over 400 government customers across Australia, Open Office offers a suite of government solutions with the Community Enterprise suite which encompasses Finance, Payroll, HR, Property/Rating, Asset Management, Environmental Health Management, Building/Planning, Compliance modules, Customer Request Management System and mobility applications.

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Entering a new Retail Dimension with ABBYY and M-Files

When opportunity knocks, it seldom knocks twice. For Ross Vincent, Special Projects Manager at NZ business Retail Dimension (now known as RD), the upheaval associated with relocating and restructuring the business in 2017 provided a unique opportunity to improve business processes, one that he grabbed with both hands.

RD is one of New Zealand's leading specialists in creating retail environments. With a team of more than 130 designers, project leaders and craftspeople, they draw on over 20 years' experience of delivering custom retail solutions. From design, manufacturing and procurement, to fit-out, signage, technology and experiential brand activations, they deliver every dimension of retail from bespoke furniture to full fit-out environments.

The infrastructure to support the business operations includes two factories with 3 office locations in both Auckland and Wellington.

A decision to relocate the production facility and office staff from Wellington to Auckland, and launch the Melbourne office in mid-2017, prompted a move into the digital era for business processes. RD implemented ABBYY scanning and intelligent data capture with the M-Files Enterprise Content Management solution.

Automated processing for over 2500 supplier invoices received per month provided the initial business case for deployment, however the solution has already begun to spread beyond this into the broader business.

"We are undertaking a significant implementation program with M-Files and ABBYY over the next 12 months," said Vincent.

"It has provided immediate benefits by allowing us to better utilise the skills within our accounts team, eliminates the requirement for manual processes, and minimises the risk of error.

"The structure that a good document management system provides, sets the foundations of streamlined management for us. When the likes of a design drawing has multiple contributors to a single document, it's crucial to know that you are all working on the latest authorised version.

"With the new system in place, knowing that there is only 'the' one version, it is the biggest mechanical change to the way we work here at RD."

Scanned invoices are stored in the M-Files MS-SQL database



"Going digital has streamlined our processes, providing greater visibility, fewer delays and fewer mistakes," Ross Vincent, Retail Dimensions

"The real opportunity here was to capitalise on a business restructure and make the resulting business stronger and smarter at the end of it."

and extracted data is imported into MYOB Enterprise. Suppliers were encouraged to send invoices by email as PDF attachments, and ABBYY OCR and Data Capture accuracy has impressed the business with a 90% straight-through processing rate achieved within weeks of kicking off the system.

The ABBYY solution includes a verification workstation that checks scanned invoices against the MYOB and line of business databases.

The approval workflow is handled seamlessly within RD's MORPHED business system, once again sitting on an MS SQL database with a web-based front end.

"Our team don't need to leave our Line of Business (LOB) system to perform approvals," said Vincent. "It just talks to another SQL data source."

The scanned PDF stored in M-Files now serves as the official record, keeping things digital and freeing up much needed warehouse space from physical documentation.

State Archives and Records NSW selects new software solutions

State Archives and Records NSW is undertaking a complete renewal of its underlying infrastructure and systems in a push to improve the online discoverability of its vast collections, and make it easier to find and use records.

State Archives has just announced that it will be adopting Ex Libris solutions Primo discovery and delivery solution and Rosetta digital asset management and preservation solution,

and Axiell Group's Adlib software, to manage its archival collection. These solutions will replace multiple legacy systems. Together, these integrated systems will enable State Archives to offer a world-class discovery experience to its large user community. Primo is a cloud-based solution promoted as a seamless, modern resource-discovery experience for users, helping them to easily find and access print and electronic resources. It provides a customisable interface, comprehensive search capabilities, and personalised search results.

The digital preservation system, Rosetta, forms a key part of Ex Libris's suite library resource tools. The system copes with diverse content types via plug-ins, which enable the management, preservation and delivery of almost any content.

Rosetta promises to fully consolidate siloed DAM and preservation operations in one unified solution, allowing for the elimination of duplicate processes and administration, to ensure data consistency.

Over 1600 institutions use Adlib collections management and Web presentation platform worldwide, including the British Film Institute, Van Gogh Museum, Rijksmuseum and the Vienna Technical Museum.

Finance Win for Top Image Systems

One of the largest financial services group in Southeast Asia, with over 500 branches, has selected Top Image Systems to implement an automated Trade Finance document processing solution. The Trade Finance Operations Department receives

approximately 10,000 documents daily from various channels. Documents received require manual data entry for validation through highly labour-intensive and error-prone manual processes, resulting in process inefficiencies and increased transaction costs.

The automated TIS Trade Finance document processing solution automates the capture, recognition and classification of incoming documents. Utilising its advanced machine learning technology, the solution processes a wide range of document templates and automatically transfers text and handwritten content into the enterprise trade processing system, thereby improving customer service levels and reducing transaction costs.

The Trade Finance Operations Department is well positioned to gain better insight to their customers, accelerate decision-making, and, in the long term, embrace new emerging technologies such as Blockchain.

"We are encouraged by the traction we are seeing in the Asia Pacific region for our banking automation solutions that encompass digital mailroom, cheque processing, trade finance and sanctions screening," commented Brendan Reidy, CEO.

"Banking and financial services represent a significant contribution to our overall revenue mix globally. We are poised to capitalize on the increased investments that banks and financial services organisations are making to automate highly labour-intensive processes in order to reduce transaction costs and improve customer service levels."

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Parliamentary inquiry warns of Commonwealth cyber risk

An Inquiry by the Commonwealth Parliament's Joint Committee of Public Accounts and Audit (JCPAA) has reported concern over failure of many Australian agencies to comply with minimum cybersecurity standards.

The report notes "The Committee is concerned that in 2015–16 only 65 per cent of non-corporate Commonwealth entities reported compliance with the Top Four mitigation strategies."

These 'Top Four' mitigation strategies, as laid out in the Australian Government's Information Security Manual, produced by the Australian Signals Directorate (ASD), are: Application whitelisting; Patching applications; Patching operating systems; and minimising administrative privileges

In February 2017 the list was expanded to the Essential Eight with the addition of: Disable untrusted Microsoft Office macros; User application hardening (block web access to Flash, Java and ads); Multi-factor authentication and Daily backup of important data

The ASD sends an annual risk survey to all Government entities, however in recent years, only 30-40% of agencies have completed the non-mandatory survey. The Joint Committee recommended that this be made mandatory.

The parliamentary inquiry was formed following an Australian National Audit Office (ANAO) review in March of cybersecurity at the Australian Taxation Office (ATO), Department of Immigration and Border Protection (DIBP) and the Department of Human Services (DHS).

The ANAO gave a tick to the DHS but found the other two agencies "were not cyber resilient and needed to 'improve their governance arrangements and prioritise cybersecurity'"

Despite an Australian Government target for all agencies to be

compliant by 30 June 2014, the JPAA report expresses concern that the ATO and DIBP are still not there yet and are thus "not cyber resilient"

"The Committee heard that the ATO expects to be fully compliant with the Top Four mitigation strategies by November 2017. DIBP, on the other hand, could not provide a date for when full compliance with all of the Top Four mitigation strategies would be achieved, despite previously advising the Committee that full compliance would be achieved by December 2016."

"The Committee is concerned to hear from DIBP that it is only in its second year of implementing cybersecurity enhancement programs. The Committee notes that significant machinery of government changes—with the creation of Australian Border Force—contributed to the delay in achieving compliance, however considers that compliance may have been achieved sooner if investment in these programs were made earlier.

"The Committee considers that all non-corporate Commonwealth entities should become compliant with the Top Four mitigation strategies by 30 June 2018 and that the ATO and DIBP report back to the Committee on their progress in implementing the Top Four mitigation strategies.

"This year the ASD updated its cybersecurity strategies from the 'Top Four' to the 'Essential Eight' in response to the increasing threat of ransomware. The Committee notes that whilst the Government has not made the Essential Eight mandatory, the ASD considers them to be 'baseline' for all organisations. The Committee notes that the ATO and DIBP are preparing plans to implement the Essential Eight. The Committee recommends that the Government mandate the Essential Eight cyber security strategies for all Public Governance, Performance and Accountability Act 2013 entities by June 2018."

The full report is available at https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Public_Accounts_and_Audit/CybersecurityCompliance/Report_467

NSW Court trials paperless trials

The NSW Land and Environment Court is conducting a trial of paperless hearings aiming to make justice faster, cheaper and greener.

"The court recently conducted its first paperless hearings in Sydney and Ballina, with a further five trials scheduled for later this year where every piece of evidence will be on a USB stick. It's estimated these hearings will reduce printing by over half a million pages, delivering significant environmental benefits," said NSW Attorney General Mark Speakman.

"The evidence is projected onto a wall, which means everyone in court is simultaneously looking at the same thing – regardless of whether you are at the bench, bar table or in the public gallery. As all material is stored electronically, it's easier and faster to move from one exhibit to another, with parties using a laser pointer to highlight the relevant sections."

Land and Environment Court Chief Judge, Justice Brian Preston said: "Paperless trials will only account for a minority of hearings in the Land and Environment Court this year, but they could quickly become the norm for lengthy civil matters as the legal profession adjusts to the technology and realises the benefits."

Barristers' Clerk Michele Kearns said, "Paperless trials are a game changer in terms of convenience as they eliminate the need to transport large volumes of documents to court. It will be particularly beneficial for lawyers coming in from out of town."

Barrister Ian Hemmings SC said, "I think once practitioners see fully electronic hearings in action, everyone is going to want to get on board."

Law firm Holding Redlich writes that "It is estimated that those two paperless hearings conducted in Sydney and Ballina saved about 100,000 pages of photocopying.

"Beyond the environmental considerations, there are a raft of benefits for parties themselves that were illustrated during the Land and Environment Court's first paperless hearings. The cost, storage and time efficiencies were immediately apparent, as parties were able to travel to and from court with everything they needed on one USB device. This is an advantage that will be especially realised during court proceedings in regional areas, where parties may currently need to expend substantial resources in transporting their materials to the location.

"Further, the setup of a paperless courtroom is advantageous to everyone involved. Counsel can access their evidence through computers at the bar, which is then projected onto the wall of the courtroom. Laser pointers are used to draw attention to the relevant aspect of the projected image. Those involved in the Land and Environment Court's first two paperless hearings remarked that finding documents was faster and more reliable through folders on a laptop as opposed to searching through bundles of documents. Any concerns about the unreliability of WiFi were ameliorated by having emergency internet dongles on hand.

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How USYD is Managing Masses of Email

The University of Sydney is pursuing a multi-pronged strategy for capturing records from email systems, according to Records Manager May Robertson.

According to its latest annual report, the University of Sydney has more than 50,000 students and more than 6,400 academic staff. Ensuring that records of the correspondence between students and staff are captured and kept for as long as needed is a key challenge for the University's Archives and Records Management Services (ARMS) team.

The University's record-keeping manual states that faculties and departments must create and keep adequate records of the teaching and assessment of students to provide evidence as to why certain decisions and actions were made. Records need to be kept to document interactions with students about courses, subjects, difficulties students encounter, applications for assistance, assignments and assessments, and complaints or appeals. Many of these interactions occur via email.

The ARMS team is implementing a combination of strategies to ensure that key email messages exchanged with students are captured and kept as records. Concluding a combination of strategies is likely to be most effective, it has decided to prioritise the capture of high value and high-risk information.

The ARMS team also tries to implement 'behind the scenes' strategies for capturing email, where possible. By limiting the actions a user needs to take, they consider that capture is more likely. The University of Sydney has Outlook as its email system and HP RM8 as its EDRMS. Outlook is integrated with the EDRMS, and users can set up mapped folders in Outlook to make it easier to capture records to the recordkeeping system.

The University communicates with students in three main ways:

- The student administration system includes the ability to send email messages to students.
- Individual teaching staff email students.
- Some teaching staff also communicate with students through the learning management system.

The ARMS team uses different strategies to capture records of these communications, depending on the systems used.

Integrating systems with the EDRMS

A lot of communication with students occurs through the student administration system instead of through Outlook. This system is integrated with the EDRMS so that records are automatically captured.

The system generates a unique student identification number (SID) for each student. This SID facilitates the capture of relevant email messages to the appropriate container in the EDRMS.

The ARMS team has set up workflows for certain student-related processes that capture email messages to the EDRMS. These are set up on demand to meet a specific problem identified by business areas.

Workflows ensure that email messages sent as part of a process or transaction are automatically captured to the appropriate container in the EDRMS.

Workflows also have important business benefits, as they ensure that the actions of teaching staff comply with university policy and procedures. Once a user initiates a workflow, they cannot deviate from the established process.

EzeScan Capture software

The University uses EzeScan software to process and capture email messages sent to students by teaching staff.

The ARMS team works with individual schools to set up the software to automatically capture messages with a SID in the subject line or body of a message. These messages are indexed and moved to the relevant container in the EDRMS.

The ARMS team provides a lot of one-on-one training with users to help them set up mapped folders and understand how to capture email messages to the EDRMS.

The team can set up a folder for each student. When teaching staff move email correspondence with that student to the folder, it is automatically captured to the appropriate container in the EDRMS.

Originally published at the Future Proof blog of State Archives and Records NSW

Insuring a successful ECM deployment with EzeScan

Based in Newport Beach, California, Insurer Pacific Life has successfully used EzeScan capture technology to improve user adoption of a newly deployed OpenText content management system.

The company recently changed its content management system over to OpenText and was facing an issue with user adoption. Staff in the Corporate Secretary's office were comfortable with the old system and were frustrated at having to input the information manually, which they were finding far too convoluted and time-consuming. They needed a more streamlined way of uploading the documents, attaching metadata, renaming the files and making them OCR compliant.

Pacific Life has been offering insurance products for over 145 years. It provides a wide range of life insurance products, annuities, and mutual funds, pension plans and offer a variety of investment products and services to individuals and businesses. Pacific Life counts more than half of the 100 largest U.S. companies as its clients.

The Corporate Secretary's office at Pacific Life deals with all of the paperwork associated with any company acquisitions and equities. The department handles all information and directions from the board as well as all official company records. The files it handles are often very large and complex legal PDF documents.

Jessica Nilsen, Senior Business Analyst, ECM at Pacific Life had worked with EzeScan in a previous role. She knew from experience that it had the ability to take a file from a shared location and register it directly into OpenText, attach all of the metadata and remain in keeping with the naming convention, all with minimal user intervention.

Initially, the EzeScan solution was implemented as a desktop client with users required to send all documents to the approver to process. Pacific Life has now implemented the EzeScan WebApps Remote Indexing solution.

Previously there was a queue of documents to process which would have taken a day or two to handle. With EzeScan in the process it now takes less than 2 hours, which represents a huge saving both in time and resources.

The next phase was to introduce the EzeScan File Upload WebApp which enables users to simply click on a link, upload a document, select metadata with cascading categories and attributes and then send it on for approval, all via a URL link. In this case all the approver needs to do is check that the document contains the correct metadata and then files it according to the naming convention.

In addition to the Web App solutions, Pacific Life has also implemented the EzeScan Server solution within its marketing department.

To comply with industry regulations, all final marketing documents must be available within the OpenText ECM. EzeScan Server works in the background to ensure this is done without any user intervention.

When documents are uploaded to a secure network shared folder EzeScan automatically takes the index file, populates the metadata values for the category and then pushes it into the correct OpenText department folder. Folder structures can be created automatically if required by EzeScan during the upload process.

Originally Pacific Life planned to have a cloud based storage mechanism to handle this but the development cost for a 3rd



party to make the searchable information compliant was too expensive.

"Implementing the EzeScan solution was very simple. Once you understand the terms it is very easy for any user without technical experience to build the jobs," said Jessica Nilsen.

"Once it's set up and integrated into the content management system it is very easy for end users to build their own solutions".

Users can handle their own design and configuration without any technical knowledge, since EzeScan utilises templates to build the jobs and upload. There is no "per page" click charge when scanning and the whole process is very simple compared to other tools, which often require scripting capabilities and additional development resources.

An additional benefit is the fact that it only took less than four days in total to complete the installation, rather than weeks.

Getting the Corporate Secretary's office to embrace the OpenText ECM system had taken three months, and after sixteen hours of training sessions it remained a challenge with users still struggling and wanting to give up on it.

However, Jessica said "once the EzeScan solution had been implemented they found the training extremely easy and only needed a single one-hour training session to become fully competent".

The improvements seen in user adoption within the Corporate Secretary's office have been huge. In time saving alone users are now able to process documents in three minutes on average, whereas previously they would have spent about 20 minutes trying to figure it out and then still resorting to making a phone call to our help desk for guidance.

Additionally, the retrieval of documents has been improved dramatically, as not only have the naming conventions been standardised but previously users often didn't bother to OCR documents, so the content wasn't text searchable. Now this happens automatically via the EzeScan Server during upload, so confidence in the system has improved dramatically.

Ultimately the increased confidence now means that the previous system can finally be retired, which frees up storage space and saves Pacific Life money because they aren't paying for duplicate systems and storage.

In the future Pacific Life are looking to expand the solution and make it an enterprise wide technology that will replace all the other capture systems through the company.

Jessica suggests that within the industry many companies rely on keeping accurate records and need the metadata that sits behind them ... "but nobody wants to add it". Users don't want to take the time to add it but the indexing capability EzeScan provides now makes this possible.



Data breach hits 50,000 Australians

The Department of Finance is one of the victims of a major data breach that is believed to be the second-largest in Australian history affecting almost 50,000.

More than 3,000 employees at the Department of Finance, 1,470 at the Australian Electoral Commission and 300 at the National Disability Insurance Agency are among the victims of poor data management by an unnamed 3rd party contractor that exposed their personal details via a misconfigured database backup to the Amazon cloud. The databases were created as backups in March 2016.

Other organisations whose employee data was exposed included around 25,000 staff at AMP, 17,000 from UGL and 1500 at Rabobank.

The Canberra Times reports the leaked information included names, passwords, ID data, phone numbers, as well as credit card numbers and corporate information including salaries and expenses.

"The Department of Prime Minister and Cabinet confirmed it was aware of a breach involving a third party contractor, but said the data exposed was historical, archived and partially anonymised."

"It contained limited personally identifiable information of government employees such as work email addresses, and in some cases Australian Government Service numbers and corporate credit card details", the department said.

The issue was spotted by a Polish security researcher according to an *ITNews* report which stated that authorities were alerted last month and that most of the credit card numbers were out of date or cancelled.

The Department of Prime Minister and Cabinet told *iTNews* that they had known of the breach since early October.

"Once the Australian Cyber Security Centre (ACSC) became aware of the situation, they immediately contacted the external contractor and worked with them to secure the information and remove the vulnerability," the spokesperson said.

"Now that the information has been secured, the ACSC and affected government agencies have been working with the external contractor to put in place effective response and support arrangements."

In a press statement, AMP stated that a small amount of the

firm's data had been left vulnerable. Most of the exposed data pertaining to AMP included detailed staff expenses. According to the firm, the breach happened without their knowledge, and the firm also named a third-party contractor as the cause of the breach.

Australia's mandatory data breach notification scheme does not commence until February 2018, after which time an organisation will have 30 days to notify the Office of the Australian Information Commissioner (OAIC) and any potentially affected individuals once they become aware of a data breach.

Mark Perry, APAC Chief Technology Officer and Principal Architect, PING Identity, commented: "It's essential to limit the release of Personally Identifiable Information (PII) of end users when choosing a third party outsourcing vendor. In this instance, we have to wonder why government employee passwords were shared with the outsourcer. That's a huge red flag and it should have failed organisational security policy. The baseline for allowing employees access to third party applications and services is using Identity Federation, where corporate passwords are not shared with the third party, and only a minimum of PII is released. The open standards used for identity federation are mature, secure and have been reviewed and audited by a plethora of security-conscious organisations."

"Another major gotcha is outsourcing identity management for employees to an Identity As A Service (IDaaS). While these service providers may tout their security credentials, again it's important to ensure end user passwords are not released to these vendors. Some IDaaS services store or cache end user passwords in the cloud, synchronised from the on-premise Active Directory, to make certain use cases simpler for them to implement. Many organisations, particularly government and those in sensitive and regulated industries like banking and insurance, should have policies which reject this model of password synchronisation to a third party."

"Ping Identity recommends that security-conscious organisations use only third party application vendors and service providers that support Single Sign On using identity federation standards (SAML and OpenID Connect), and IDaaS services that do not store or cache the corporate passwords of end users. Multi-Factor Authentication should be used to provide another layer of security, so that in the unfortunate event of credential loss, unauthorised access to corporate systems and data will be blocked," said Perry.

TOTAL:
14,622
INV No

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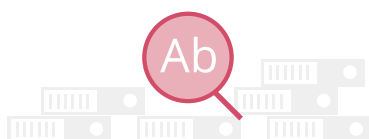
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- Accelerate Transactions

- Fast ROI — usually 3 to 6 months
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Managing Enterprise Content: The State of ECM and FSS

By Holly Muscolino

Much has been written about renaming and recategorising technologies in the enterprise content management (ECM) space, and it is true that traditional ECM solutions have developed into application suites, which offer a broadening range of content management, collaboration, and workflow automation capabilities.

Recent innovations from both established vendors and new entrants include cloud enablement and a shift toward easier-to-use interfaces for business users.

We have also seen consumer file synchronization and sharing (FSS) services morph into enterprise-grade solutions, adding capabilities traditionally found in ECM offerings, with additional support for enterprise collaboration. These FSS solutions are now addressing the control and security needs of information technology (IT) departments.

So, the boundaries between these technologies are evolving, expanding, morphing, merging, modularizing, and blending, but the requirement for organizations to manage content is as compelling as ever. For these reasons, we conducted a study earlier in the year to assess user needs and challenges related to managing enterprise content. We surveyed 375 technology influencers and/or decision makers in US organizations that had deployed or were evaluating ECM or FSS software.

It is no big surprise that reducing cost, improving operational efficiency, and increasing employee productivity continue to be the primary drivers for transforming content-intensive workflows and managing enterprise content. One-third of respondents also cite improving collaboration, both internally and with partners, as a key driver.

While ECM is more often deployed to manage final-form content and as part of a content workflow automation or case management solution, FSS is considered more for supporting enterprise collaboration.

On average, only 40% of an organization's content is managed by an enterprise-sanctioned ECM or FSS solution. Organisations

(across all company sizes) typically have four different ECM systems by various vendors implemented at their company.

Interestingly, over 65% of respondents expect to increase their budget for ECM over the next two years, and 47% expect an increased budget for FSS. At least part of this will be driven by consolidation—over 40% of respondents indicate that their organization will consolidate ECM vendors in the next 12 to 18 months, and almost one-third will consolidate their FSS providers. Only one-third of respondents expect no change, indicating a very dynamic market ahead.

When asked for the motivations behind changing, reducing, and/or consolidating their ECM or FSS suppliers, respondents cite obtaining additional capabilities and reducing the number of suppliers to deal with as the top reasons. In regard to ECM, almost 40% of respondents indicate the need to move content to the cloud, while one-third of respondents indicate the need to switch from FSS to an ECM solution.

Clearly, one solution (or solution category) is not meeting all needs. However, we believe that the days of deploying a monolithic, one-size-fits-all solution are rapidly fading.

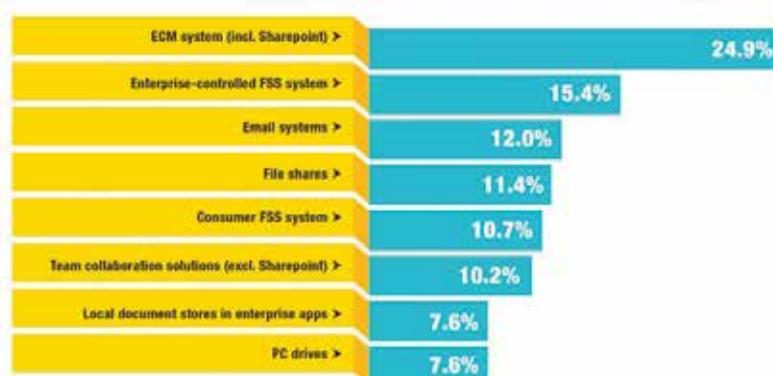
Instead, we expect to see larger numbers of purpose-built content management solutions, using the most suitable modules drawn from a common technology stack, with the goal of improving stakeholder and customer experience. As a result, traditional technology boundaries will diminish.

Management tasks will be increasingly offloaded to cognitive solutions, including artificial intelligence (AI). In fact, in this research, over 60% of respondents indicate that they are currently using or planning to implement cognitive and AI technologies to manage unstructured content in their organisation. Yes, the requirement for organizations to manage enterprise content is as compelling as ever, but the metamorphosis of the technologies to support that effort continues.

Holly Muscolino is the Research Vice President of the Content Technologies and Document Workflow group at IDC and is responsible for research related to enterprise content management, including records management and case management. Follow Holly on Twitter @hmuscolino.

WHERE YOUR CONTENT IS MANAGED

Respondents were asked to estimate the percentage of their organization's content that is managed in each of the following locations.



% of respondents (N=325)
Source: IDC 2017

Promapp blows in at Whitsunday Council

Whitsunday Regional Council in Queensland has announced that it will implement cloud-based business process management software from Promapp to support the organisation's day-to-day operational processes.

The decision, which was part of the council's strategic plan prior to Tropical Cyclone Debbie, was expedited by the havoc caused by the storm earlier in the year. Promapp will underpin process support for a major new council IT system which is slated to go live within the next 12 months.

Similar to many businesses in the path of this year's natural emergency in Queensland, the onslaught of Tropical Cyclone Debbie reinforced the significance of where and how Whitsunday Regional Council's IT systems are managed and where council processes are stored. The result is a decision to host council processes in the cloud to better support its overall business continuity, disaster recovery and risk compliance.

"Prior to Tropical Cyclone Debbie, all our processes were controlled and stored manually on locally-held computing devices which is less than optimal when you're faced with a distributed workforce in a natural emergency where quickly following approved processes is critical to support the community and mitigate overall risk," said Jodie Rugless, Manager Innovation & Technology, Whitsunday Regional Council.

"What we needed at council was a system that can manage and update critical regional process content in a simple way to ensure it is captured in approved template formats, which is usable by teams and individuals wherever they are located while at the same time being easy to manage and update."

Promapp will support the council's decision to embark on an infrastructure renewal project followed by a core IT system replacement which will impact core processes across operations.

"The new IT system will eventually integrate with a future enterprise content management (ECM) system and be available in the cloud so that when we're faced with future emergencies, we can access information at any time, from an island on the Barrier Reef to the public library in Bowen," said Rugless.

In deploying Promapp, the council is replacing its ad hoc, departmentalised, informal approach to process which has seen many processes held in various formats, resulting in a lack of engagement and out-of-date information. Promapp will enable Whitsunday Regional Council to map, review and improve processes. Version control of processes will provide the council with a systematic process for continuous improvement in all aspects of leadership and management and provide a basis for measuring adherence to business principles. Single sign on will also facilitate ease of use across the organisation.

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Why People Fail to Share Knowledge

By Zach Wahl

Effective knowledge sharing is the lifeblood to knowledge-based organisations. High-performing organisations are ones that have mastered the art of empowering their newer employees with the knowledge and experience of the more-tenured, highlighting new ways of thinking and doing, and fostering a broad set of avenues for knowledge to flow up, down, and sideways throughout the organisation.

Through my years of KM consulting, I've noted that too often an organisation will focus on trying to fix the tools and technologies around knowledge capture, management, sharing, and finding, without addressing the behaviour, processes, and culture that feeds mature knowledge sharing organisations.

Within this framework, the "if you build it they will come," concept is blatantly false. Most team members won't gravitate toward the shiny new tool just for the sake of it. A new technology may attract a small subset of early adopters or may generate an initial burst of interest, but without a focus on instilling and maintaining a culture of knowledge sharing in your organisation, these tools can only do so much.

In my experience, there are three primary reasons people don't share their knowledge, especially in the context of tacit knowledge capture in online KM Systems like communities of practice, micro-blogs, and threaded discussions.

Lack of Priority – When we speak with knowledge holders we often hear phrases that include, "I don't have time," or "I'm too busy." This often gets diagnosed as a lack of interest in sharing one's knowledge, but at EK we often find the root cause to be a lack of priority stemming from management. If an organisation doesn't stress the value and importance of sharing knowledge, enterprise knowledge sharing can't be woven into the fabric of the institution.

Worry About Being Replaced – Everyone has heard the phrase, "Knowledge is Power." Unfortunately, many people tend to consider this as job security. We often encounter individuals uninterested in knowledge sharing because they want to be the person with the answers. For them, empowering others with that knowledge means they're less essential to the organisation. We commonly see this in highly competitive organisations or functions and industries already experiencing high turnover.

Fear of Getting in Trouble – In more heavily regulated organisations, individuals often have it drilled into them that anything digital is discoverable in court. This can sometimes lead to a negative loop, where individuals avoid documenting their knowledge. Even in less heavily regulated organisations, certain organisational cultures punish the squeaky wheel and instead encourage their employees to keep their heads down and get the job done the way it has always been done.

Though developing and sustaining a culture of knowledge sharing in your organisation requires a broad array of techniques and tools, there are several keys that I find to be critical to overall success.

Start at the Top – Knowledge sharing culture, like most organisational culture change, starts at the top. The leaders of an organisation can invigorate or kill a knowledge sharing initiative based on the support they give it and whether they themselves use it. If an organisation's management sets knowledge sharing as a priority, it will be so.

I recently had a CEO tell me he would write the first micro-blog for the company's new wall and commit to visiting the space at least once a week. That type of leadership doesn't always exist, but where it does, you're likely to see a much easier transition to effective knowledge sharing at all levels.

Reward and Honour Knowledge Sharing – Organisations that are the most effective at knowledge sharing are those that treat their experts like rock stars. The holders of knowledge should be rewarded not just for having it, but for sharing it. Effectively rewarding and honouring knowledge sharing can take many different forms. It can include tying knowledge sharing metrics to real incentives (bonuses, positive reviews, etc.), but certainly doesn't have to. Simply recognising individuals as experts and broadly thanking them is oftentimes enough. One organisation with whom we've worked has begun providing unique online badges and titles to those who have shared their knowledge energetically and effectively, and the results have been excellent, with more in the organisation seeking the same recognition and wanting to participate.

Protect Your Knowledge Sharers – Ensure you've established appropriate governance, workflows, and training for knowledge sharing. This goes beyond saying "No, Stan, this is not the place for you to share pictures of your eight cats wearing matching bow ties." Depending on the industry and framework of your organisation, you need to protect your employees by putting the appropriate controls in place so they leverage their knowledge sharing tools in the ways for which they're intended. Mistakes will happen, so having the right level of reviews and shepherding of content is also a critical investment to ensure these systems trend towards "better" instead of "worse."

Think About Email – People use email because it is easy, familiar, and fast. As you're designing your future knowledge sharing systems and processes, recognise that it takes no more than 45 seconds to send an email with an attachment. Design your knowledge sharing system to allow someone to share in 45 seconds or less. That means sacrificing some level of granularity for the overall usability, but the level of participation will increase as the barrier to entry decreases.

Provide Context – Knowledge sharing systems without context quickly stagnate. If you've defined a broad and shallow community of practice for "Innovation" around your organisation, don't expect a lot of conversation. Knowledge sharing formats, especially at first, work best with more specific topics and content from day one. The fastest buy-in for knowledge sharing tools happen when the conversation has already begun. To that end, in advance of deploying a tool...

...Seed Your Content – A critical step in the design and deployment of a knowledge sharing system is mapping what I call the "Eaters" and "Feeders" in the organisation (those who will primarily consume content, and those who will primarily supply content). Recognise, too, that a Feeder on one topic is a potential Eater on another. Prior to rolling out a new tool, make sure you've enlisted a key number of your Feeders to begin conversations and use these tools in order that, by the time the Eaters get to see it, there's something for them to consume.

Communication Goes Both Ways – As with any KM initiative, two-way communications are critical for success. Help your users understand the importance and value of knowledge sharing, but also continuously seek their guidance and feedback on how to make it easier and better for them. If you've got a knowledge sharing tool or are planning on rolling one out, I strongly recommend you create a specific forum for ideas on how to improve the tool!

If you're struggling with instilling a culture of knowledge sharing and setting up the right processes and technologies to leverage and help sustain it, let us know. We would love to share more of our own knowledge with you.

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



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How to Make Email and Other Technology Interruptions Productive



The average knowledge worker enjoys a measly five minutes of uninterrupted time and, once interrupted, half won't even get back to what they were doing in the first place. Yet organizational expectations or social pressures make it hard to resist the urge to check incoming emails or text messages — pressing tasks be damned.

Research suggests that such interruptions are not necessarily bad, and can even be productive.

"I know from personal experience that some interruptions are actually good," says Shamel Addas, an assistant professor of information systems at Smith School of Business in Ontario, Canada. "It depends on the content and timing. You can get some critical information that will help, like completing your task. So that's one of the assumptions I feel needs to be challenged and tested."

Addas has conducted several studies to learn more about the relationship between technology-related interruptions and performance.

He found that interruptions that did not relate to primary activities undermined workers' performance — they led to higher error rates, poorer memory, and lower output quality. It also took longer for workers to return to their primary work and complete their tasks. Such interruptions also had an indirect effect on performance by increasing workers' stress levels.

Email interruptions that related to workers' primary activities increased stress levels as well but also boosted workers' performance. Such interruptions were tied to mindful processing of task activities, which led to better performance both in terms of efficiency and effectiveness.

Addas also discovered that the very features of the interrupting technology can influence the outcomes of the interruptions positively or negatively. Individuals who engaged in several email threads of conversations at the same time or those who kept getting interrupted by email but let the messages pile up in their in-box experienced higher stress levels and lower

performance. And those who reprocessed their received messages during interruptions episodes or rehearsed their message responses before sending saw some benefits. Doing this enabled them to process their tasks more mindfully, Addas says, which boosted their performance.

What does this mean for managers? For one thing, just recognizing that there are different types of interruptions, each with its own trade off, can help managers mitigate the negative impacts on performance and stress.

Addas suggests that managers develop email management programs and interventions, such as specifying a time-response window for emails based on their urgency or relevance to primary activities. They can also establish periods of quiet time for uninterrupted work. And they can encourage work groups to develop effective coordination strategies to ensure one person's interruptions do not adversely affect colleagues.

As for individuals, they can start handling interruptions in batch rather than in real time to reduce the costs of switching back and forth between tasks and interruptions. To reduce stress from overload, Addas suggests, people should limit parallel exchanges during interruptions and delete or folder messages that are of limited use for their core work.

"People might well consider thinking about the messages they construct and examining carefully their previously received messages as needed to ensure that they process their tasks more mindfully, which is beneficial for performance," Addas says.

Addas believes there are design implications to consider as well, particularly relating to context aware systems and email clients. Context aware systems know what kinds of tasks people are working on and can detect high and low periods of workload.

"Email clients can be programmed to screen messages for task-relevant content and distinguish between incongruent and congruent interruptions," he says.

"They can then manipulate the timing at which each type of interruption is displayed to users, such as masking incongruent interruptions until a later time."



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The background is a solid blue color. A network of light blue lines connects four circular icons: a yellow document icon in the top left, a magnifying glass icon in the top right, a green calculator icon in the bottom left, and a hand holding a tablet with a red app icon in the bottom right. The title 'WORKFLOW AUTOMATION' is in large, bold, orange letters with a black outline. Below it, 'THE FUTURE OF WORK IN THE ERA OF INTELLIGENT INFORMATION MANAGEMENT' is in smaller, bold, white letters with a black outline.

WORKFLOW AUTOMATION

THE FUTURE OF WORK IN THE ERA OF INTELLIGENT INFORMATION MANAGEMENT

By Sean Nathaniel, Upland Software, Inc.

There's no question, the year is by, and it marks an exciting paradigm shift that has industry experts buzzing. We are currently witnessing the culmination of years of deep discussion regarding the future viability of the ECM industry, which is changing the way businesses define their processes and focus.

(Continued Page 20)



WORKFLOW AUTOMATION

THE FUTURE OF WORK *(From previous page)*

Ultimately, what this auspicious new era demands of businesses is the ability to adapt to the next generation of the workforce, one that is increasingly decentralised, technologically demanding, and wary of inflexible processes that don't intelligently and seamlessly manage a data set that consists of both content and data (not either or). Those millennials are shaping a bright and promising future for the industry.

All current trends in business point to a reality of flux. Per a recent e-book by the Association of Information and Image Management (AIIM), 79 percent of organisations now indicate that BPM (and by default, automation) is significant (45 percent) or imperative (34 percent) for the success of their business — up from a total of 55 percent in 2016.¹

To understand this dramatic increase, we need to take a deeper dive to understand the myriad driving factors within workforce demographics that are coalescing to create the unique pivot point we see today.

ORGANISATIONS SHOULD FEEL OPTIMISTIC ABOUT FINDING NEW WAYS TO INNOVATE AND AUTOMATE

What's more, by understanding these factors, we can ultimately predict how organisations' adaptations will directly influence future success in an increasingly competitive, data and tech-driven environment.

Whoever is most eager to embrace these new standards and evolve is most likely to succeed (survive). Gone are the days of working a lifetime at one company and collecting a pension. Gone too, per Standard & Poor's analysis, are multi-decade business lifespans.

Since 1950, the average life cycle of a company has been



reduced from 60 years to 15 (see chart below). Contributing factors to this change are complex, and include:

CLOUD & MOBILITY

A 2016 Forbes article states that by 2020, 50 percent of the U.S. workforce will be freelancers — perhaps not full-time, but one of every two workers will be working on their own terms in some capacity.²

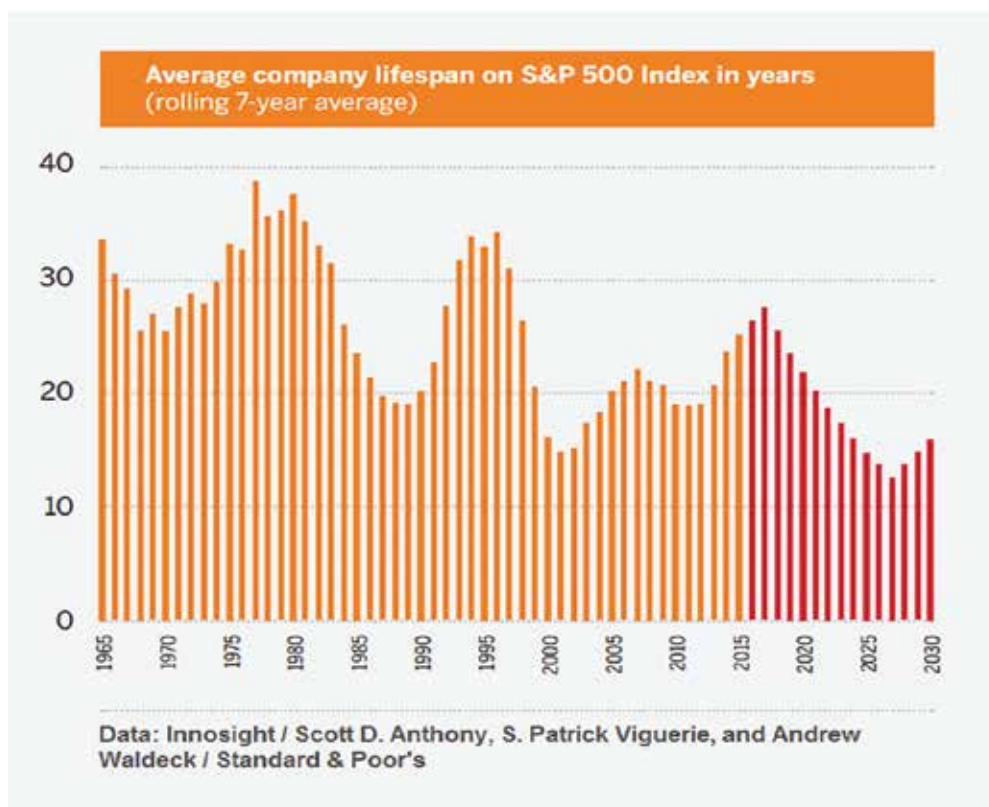
To keep pace, organisations must take the approach of making their data and core functions “omniaccessible” for their knowledge workers, who are no longer constrained by location, set office hours, and may even be working from another time zone or a completely different continent.

Demand for universal, cloud-based access to work assets continues to escalate, as an increasing set of employees no longer adhere to an 8-to-5, cubicle-bound workday.

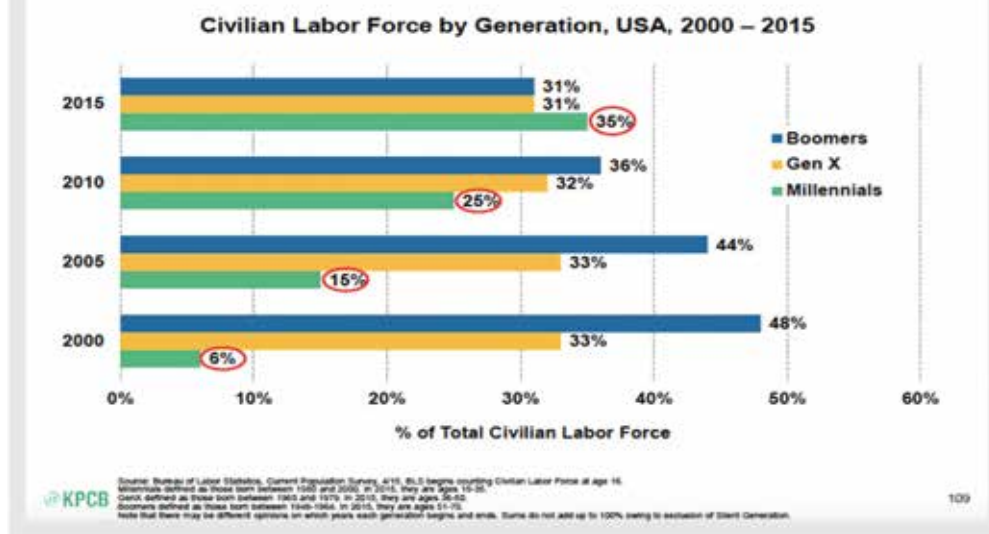
RISE OF THE KNOWLEDGE WORKER

As the generational shift is occurring, so too is the definition of the employee altogether. Rather than employing workers with a generalised skillset, organisations are seeing an increase in demand for specialised knowledge workers.

In fact, the past three decades have resulted in more jobs tailored to knowledge workers than ever before. As noted by the *Wall Street Journal* in May 2016, “While routine jobs have gone nowhere over the past three decades, the number of people



Millennials (Age 15-35) = Largest Generation in Workforce



in knowledge work jobs has more than doubled, and there are no signs of that trend slowing. This strongly suggests that even though technology is eliminating some jobs, it's creating even more in different fields. In fact, knowledge work occupations have been adding more jobs than any other year since the 1980s — about 1.9 million per year.”³

CHANGING DEMOGRAPHICS

Between 2010 and 2015, the number of millennials in the U.S. workforce increased by 10 percent, making them the largest generation slice in the current workforce for the first time (see chart above). By 2025, millennials will comprise three-quarters of the global workforce.⁴

Unsurprisingly, this shuffle in terms of priorities and procedural/process changes is due in large part to the percentage increase of millennials (and up-and-coming Gen Z workers) in the workforce, alongside the decline of the boomers. The generational shift is imminent; times are changing, and expectations are too.

REDEFINED ORGANISATION STRUCTURE

So how do we adapt the organisational structure of businesses to accommodate this new workforce? (Are the days of eight managers harassing a bedraggled worker about a mucked up TPS report over, please?)

Businesses have already begun to experiment with different organisational structures, in some cases eliminating the concept of a hierarchical manager (or eight) altogether.

Though still somewhat in its infancy, the concept of self-management is catching on. And why not?

“Our daily work continues to expand in complexity, and ... [workers] are asked to think more creatively to boost innovation, but our organisations often seem to stifle the very behaviours we’re being asked to perform!” says Josh Allan Dykstra in his *Huffington Post* article on the trend, “*The Future of Management is No Managers.*”

“We need to find a way to get the organisation out of the way of the work, and self-management principles amplify this ability dramatically.”⁵

BIG DATA

One of the merits of automated, intuitive solutions is the accrual of massive amounts of data that’s being transformed into knowledge, which can then easily be converted into analytics. Many organisations silo this information and don’t make much

use of it in terms of the larger picture. But the rise of predictive analytics has far-reaching uses for internal processes, as well as external initiatives.

How useful would predictive analytical data be to help your accounts payable department drastically improve response and turnaround times for payments? What if this data was already at your fingertips, and could free up staff time for larger tasks - like budget renovations?

What if your human resources department had simple access to data that would help them reduce the overhead of onboarding new employees, so they could focus on items to improve company culture?

An end-to-end automated solution will have these capabilities built in to its blueprint, meaning you can harness all the data available to further the mission of your business.

To adapt to this increasingly fluid, transient, decentralised modern ideal, organisations must infuse their inner workings with capabilities that include automation and clarity around workflow. There is a need to balance flexibility with reliability.

Making this procedural change removes the burden of tedious work from employees, which simultaneously increases productivity and efficiency in addition to cutting costs associated with bottlenecks or errors.

Automation simplifies processes, while infusing a paradigm shift of improved procedures, true data transparency, and an increased capacity to do business well to delight clientele and staff alike with streamlined, intuitive processes.

How do organisations evolve? By implementing solutions that hinge upon an all-in-one, end-to-end process visibility to help to continuously review, optimise, and improve upon the key results. Think of the trends we’ve already discussed: innovating to accommodate the future workplace, the move to a decentralised, transient workforce, and the need to engage with customers worldwide, simultaneously.

To accommodate the changing needs of employees while successfully engaging with customers on a global stage, you need to initiate the process digitally at the closest point of origin possible. How can this happen?

ELECTRONIC FORMS

Our culture is already accustomed to the quick turnaround environment made possible by tech and automation - and this includes finding ways to accommodate both internal and external customers.

(Continued over)

WORKFLOW AUTOMATION

THE FUTURE OF WORK *(From previous page)*

People expect to come to one centralised place, a well organised hub, to not only seek out information, but to quickly and painlessly submit their information and documentation for their needs - for example: submitting an employment application, presenting a P.O. or check request, or altering a class schedule by adding/dropping courses.

This hub needs to have a flawless user experience and be available on any device, anytime from anywhere (yes, even off-line). That means this hub needs to be quick, comprehensive and secure. E-forms are critical to achieving this trifecta.

WORKFLOW AUTOMATION

To adapt to changes in technology, as well as balance increasing workloads, employees need a surefire way to streamline duties, collaborate, automate, and add transparency to everyday tasks.

Workflow simplifies the path that documents take, creating transparency while simultaneously automating notifications/escalations and allowing users to segment information by permissions. Smart workflow uses technology to eliminate bottlenecks, foster collaboration, encourage accountability, and improve processes by creating efficiency and accuracy where there was once chaos.

Automated, full documentation means happier employees, customers, and auditors/outside collaborators.

PREDICTIVE ANALYTICS

Most businesses are awash with data regarding their processes, yet they don't make real use of this information in a focussed, forward-thinking way. Realtime, predictive analytics and customised reporting capabilities are a feature built into automated solutions.

Used well, the data provided by these analytics can improve strategic decision making and help an organisation learn from inefficiencies to improve their processes in a lasting, meaningful way.

Coupled with workflow automation, the insights from analytics will drive continuous optimisation and improvement of processes.



MOBILE MESSAGING

As current and future generations come of age in this data-centric, text-first era, the de facto communication method for the new workforce will be text messaging. Various studies show 90 percent of text messages are read within three minutes, and have a 98 percent open rate (versus email, with a 20 percent open rate).⁶

Clearly, enabling text messaging and text message-based workflow will be a huge driver for the next generation of productivity gains in the enterprise.

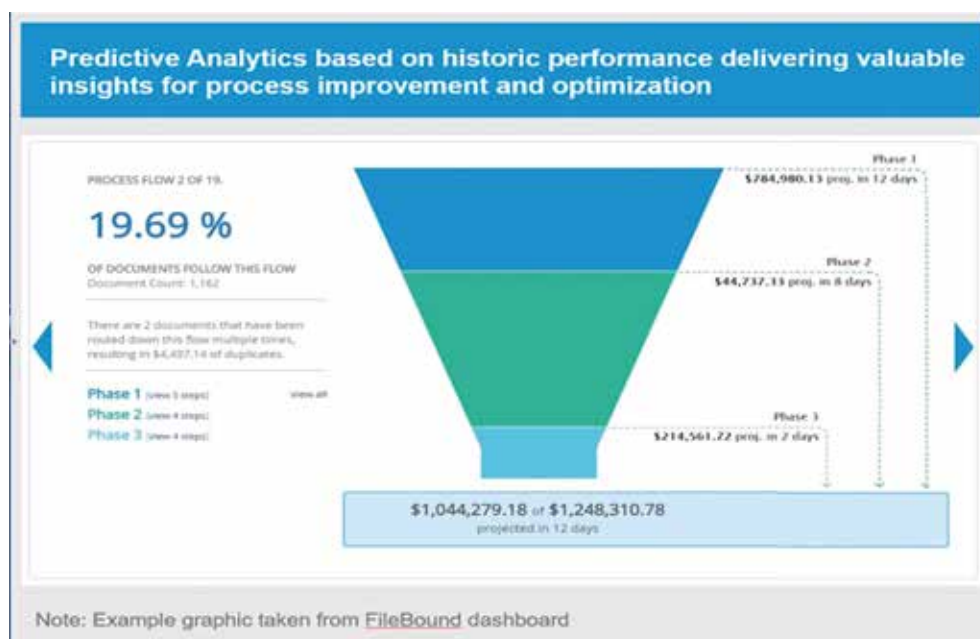
SECURITY

Data is a new form of currency in our brave new world. And this means whatever the data is - proprietary, personally identifiable or otherwise - it needs to be unflappably secure. Yet paired with the new standard of a workforce on the go, data simultaneously needs to be available to permissioned users from anywhere.

What does all this mean? Essentially, it means whichever automated solution(s) organisations decide upon, it's essential that it can be rapidly deployed, provides reliable, intuitive tools for collaboration, and of course, fixes the broken enterprise.

Implementing an automated solution is all about saving time, providing transparency, and maintaining - or improving - accuracy of processes. Doing all of this while engaging the next generation workforce and customers is admittedly a challenge, but it will be the differentiating factor for those companies that succeed in extending their average life span — and those that don't.

In this increasingly intricate business environment where technology changes seemingly daily, the ability for employees to collaborate and remain flexible (while retaining accuracy, efficiency, and security) is paramount for success.



Though the future of work is still solidifying, the fact that businesses need to brace for the upcoming adaptations is certain.

With this changing dynamic, we are seeing the move from a stable hierarchy to a fluid, self-motivated organisational structure.

Again, this entails considering details like:

- Internal & External Teams (decentralised/transient) — processes and systems must accommodate both sets of workers equally
- Subscribed Applications — reliable, secure cloud-based systems & tech is a new standard, not just a perk.
- Solutions built for purpose — rapid implementation and adoption demand those built-for-purpose solutions that provide just enough flexibility.
- Time to Value Focused (time > ROI) — as employees feel more burdened with daily tasks (mountains of email, anyone?), automation empowers them to free up time for more meaningful endeavours.
- Outsource Domain Expertise — ability to capitalise on transient or external expertise for competitive differentiation increases the need for new types of systems and processes with flexible licensing models.
- Re-imagined Employee Engagement — per the same global study by Ernst & Young mentioned earlier, the top five reasons people quit their jobs are: minimal wage growth, lack of advancement opportunity, excessive overtime, a work environment that does not encourage teamwork, and a boss that doesn't allow you to work flexibly.⁴ Automation can correct several — if not all — of these factors.

In this new era, we must acknowledge the move from a stagnated concept of enterprise content management (ECM) to the new standard of more intelligent information management (IIM). Data is now considered a living, breathing entity that includes both data and content.

It follows that implementing standardised automation and transparent workflow processes allows us to seamlessly move this data in a more reliable way, while accommodating knowledge workers and their growing list of demands in the workplace.

MAKING THE MOVE TO AUTOMATION

However, your organisation decides to implement an automated solution, there is a laundry list of important items to consider. But let's start the conversation with ten items:

1. Does this solution require extensive training?
2. Can users quickly create new forms and workflows, and add new users and projects? Is it easy to manage, store, and retrieve multiple versions of documents?
3. Does this solution extend functionality beyond traditional enterprise walls, fostering interaction with clients, prospective employees, contractors, separate divisions, and so forth? Can my knowledge workers work from anywhere, anytime with no issues?
4. Does this solution easily integrate with other existing systems?
5. Can we easily (or automatically) create consolidated files/records with documents of any kind (PDF, e-forms, Word) without changing the format of those documents?
6. Does this solution allow for collaboration, or lockdown - depending on need or user role?
7. Are there predictive analytics capabilities to allow us to strategically analyse and find solutions for any internal issues or capitalise on areas of opportunity?
8. Can we empower business users to modify automated workflows, create e-forms, add users, or perform other tasks on the fly?

9. Is this a licensing model that supports engagement for unlimited users?

10. Is this solution supported by cutting-edge cloud facilities?

By understanding the demands of the future workforce and business climate, then coalescing this with your specific demographic details, you should be able to map out the best way to implement a solution.

Consider your current company size, your projected growth rate and strategic plan, and make sure you have a comprehensive understanding of the amount of data entry reporting requirements your staff is currently undertaking during their average workday.

After discussion with others in management and various departments, come up with a comprehensive list of needs in order of priority. This will help your organisation make the right decision when implementing workflow automation to innovate and accommodate for the changing workforce and demands of the new era of ECM - or as we now know it - Intelligent Information Management.

THE NEW ENTERPRISE ERA

In short, all the negative buzz around the future workforce and millennials is just that - buzz. Clickbait.

The naysayers criticising the new generation of workers (for whatever — entitlement, work ethic, new expectations) are following a time-honoured tradition of simply not being ready or capable of change.

The writing is on the wall, and if you can't evolve ... well. There's no denying reality, the next generation of the workforce is eager to work, and their skillsets are broad, yet specially attuned to approach their duties in a different way than generations of workers we've seen before.

I see this new enterprise era as full of promise. Organisations should feel optimistic about finding new ways to innovate and automate, and to rethink ways of doing things within the enterprise and for their clientele, whether internal or external. We're now able to uniquely partner the latest technology to innovations and staff needs in a way that provides opportunities for a better, mightier workforce with the ability to accommodate more meaningful, specialised services to delight clients and end users.

Adaptability is key for organisations striving to take their place on the podium. Welcome to the new era; it's time to embrace the differences and evolve.

Sean Nathaniel is Senior Vice President and Chief Technology Officer for Upland, Inc., where he oversees Upland's Workflow Automation products, including FileBound Document Management. This article originally appeared in the September 2017 issue of Workflow.



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The 7 Key Process Mistakes

By Kate Fuelling

I've recently been working with an organisation to digitise their internal approvals process for everything that needs the CEO's signature. Their current system is mainly paper-based (think in- trays, tracking spreadsheets, and missed deadlines because paper goes missing) and is certainly ripe for digitisation.

However, when we mapped out the current process, paper was the least of their problems. There were so many other issues contributing to the challenge of getting documents approved that we put the digital transition on hold and worked through the process problems that were at the heart of the problem first.

Here are the Top 7 Process Mistakes to help you identify where things are going wrong in your organisation.

When I talk about reviewing your processes, it's not just about going digital and removing paper, but removing all types of waste, which is what Lean process improvement focuses on. Lean purists will tell you there are only seven types of waste (and I refer to their type names slightly differently too), but they miss out on one of the key wastes caused by poor process (especially by poor IM process) and they miss out on an edgy acronym: DOWNTIME.

I once read that 'process work is social work'. I think that is a useful way of looking at process improvement. Successful process improvements don't just lead to financial gain, but also improve the experience of your staff, customers, donors, or members - all the people you care about.

1. You believe things are working fine

My shoulders droop about 10cm every time someone says, "It's working OK," or, "It's fine, we don't need to fix it," and you shouldn't be happy with this response either. You are out to make a real difference in the world.

Your processes should be superb, extraordinary, super-slick. Anything else wastes resources and causes disruption, preventing you from doing even greater things in the world than you are doing now.

I guarantee that if your process hasn't been reviewed and refined in a systematic way in the last six

months, there is room for improvement.

I always ask the same question when someone says that a process doesn't need to be reviewed, "So, your process is perfect? There is nothing you would change about it?" Funnily enough, there's always something that they would change.

2. You focus on Technology and forget about Process

While you are looking at transitioning your organisation to digital ways of managing information, it seems ridiculous not to have a close look at your current ways of working and see what you could

improve, but that's what a lot of organisations do. It comes back to the view of technology as the magic pill. People assume that technology is the whole solution, and there is no need to analyse the process as well.

It's true that in some ways technology will modify your process, but that gives you even more reason to ask hard questions about each step in your current process.

3. You digitise an analogue process verbatim



You've heard the term 'garbage in, garbage out', haven't you? But have you ever heard of Kentaro Toyama's 'Law of Amplification'?

In his book *Geek Heresy: Rescuing Social Change from the Cult of Technology*, Toyama concluded that "Even in an age of amazing technology, social progress depends on human changes that gadgets can't deliver."

Toyama's Law of Amplification suggests that technology only amplifies the existing process, so if the process is poor, technology can't deliver improvements, and just makes everything worse. It's a much more elegant way of saying garbage in, garbage out. He goes on to say that instead of investing in technology to create change, we should invest in people. My take on this is to suggest that we invest heavily in people, then create good processes and technology around them.

If you simply digitise your existing paper-based process you bring the wasteful parts of the process along and amplify them, while at the same time you are probably missing out on some

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

of the incredible capabilities that digital technology can bring. Think about a staff leave request form as an example. If you digitised the analogue process, you would probably:

1. Fill out the form in Word
2. Save it to your desktop
3. Email it to your manager/HR for approval
4. Receive approval via email
5. Save the form in a document management area
6. You, HR, and your manager all update your calendars
7. HR updates their staff files.

Let's look at the inefficiencies in this process. You now have at least two copies on your computer. Your manager and the HR department have either one or two copies (depending on how effectively they manage documents), and there are probably some extra copies attached to the email. In

addition, there's all that work with calendars, files, and so on. It's clunky and creates multiple duplicate files. And while the process itself doesn't require any paper exchange, how many people do you think print it out for their own records?

Instead of just thinking within the confines of analogue and paper, you need to be open to the possibilities technology can

enable and the purpose of your process.

In this example, the staff member requesting the leave is the first person in the process, and any data they enter should be pulled through your digital solution without further manual entry of the same data.

The only other requirement for staff involvement is the manager/HR approval. All the rest could easily be automated and the process would only be three or four steps, rather than seven.

4. Your Processes are too rigid

There is a time and a place for rigid process (for example, workplace health and safety), but generally internal organisational processes should allow a level of flexibility that enables all staff to engage willingly in the process. If not, they will find a workaround. Guaranteed.

5. You are blind to Improvements

Have you ever noticed that when something needs to happen urgently, corners can be cut with impunity? If parts of the process can be skipped over in an emergency then you need to ask why they are there in the first place.

I was working with an organisation that had a cumbersome internal approval process whenever the

CEO's approval was required. First, it went through every layer of the organisation, and each of

those people had to sign the request before it got to the CEO's desk. However, the level immediately below the CEO was a single Director, so when he was away, his signature could be omitted. When I asked why it was required in the first place, the team was surprised. They hadn't thought about it this way before.

Part of the re-engineering process then involved finding ways of allowing relevant people to contribute without necessarily requiring their signature.

Sometimes you can be too close to the process to see where improvements can be made.

6. You aren't involving enough People in your Process review

You may be surprised how great an impact a seemingly small process can have on many aspects of your organisation. Business processes are far more complicated than most people realise and when process improvements are initiated they are often run by a small group of staff who are responsible for the process, but who forget to talk to other customers or stakeholders about what the process needs to do in the first place.

The people who run a process improvement assessment are generally the same ones who originally designed them, so the outcome is often more closely aligned with their metrics and motivations rather than the overall requirements and purpose of the process within the organisation.

You should avoid the trap of working from a single perspective



by asking different types of users and stakeholders for feedback and requirements before you finalise your process design.

A successful process re-engineering project relies on including the perspectives of all of those involved, not just the primary stakeholder and the process administrator. The more input you get, the better designed your solution will be, and the greater your chances for widespread uptake and successful outcomes.

7. You aren't taking any real action

One of the worst things you can do is to see problems with your processes, ignore your discoveries, and expect things to get better (Einstein defines this as insanity).

But I think there's something even worse: conducting a process improvement activity, consulting with stakeholders, documenting the current process and the new process, and then doing nothing to implement it.

One of the loveliest things my clients say about me on a regular basis is that when I'm around stuff gets done. I know it takes time and resources to analyse your processes and it may be difficult to change them, but if you have done all this work and still have nothing to show for it, it's depressing.

It's also insulting to all those people who gave you their time and insight so that you could develop the new process when nothing changes. I believe that this sort of experience can be the reason for the glassy stare you get when you talk about taking time out of people's busy schedule to discuss this kind of stuff. It's also another big contributing factor to 'change fatigue'.

Process improvement isn't easy, especially in a Digital by Design context where it includes the use of technology. You've got to be brave, willing to endure the discomfort of it all, willing to put resources into it, and willing to implement your new processes when you've designed them.

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.

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Putting customers at the centre of a digital transformation strategy

By Damian Aivaliotis

While most digital transformation projects are aimed at making internal workflows more efficient, it's important not to overlook their potential for having a positive impact on customers.

Rather than looking inwards when identifying opportunities for streamlining processes, increasing numbers of organisations are looking outwards. They are harnessing digital technologies and strategies to improve service levels and remove inefficient work practices. For example, a high-profile Australian insurance company recently implemented a claims processing solution designed to significantly reduce reliance on paper documents. More importantly for its customers, the company was able to slash the time required to process claims from more than 20 days to less than 10 - a 50% improvement.

Now, when a customer rings the company to check on the progress of a claim, staff can instantly access all their records and data which is stored in a single location. The customer can be quickly informed of the status of their claim and when a resolution is likely to be completed.

Meanwhile, a large financial planning business has undertaken a digital transformation project designed to allow better management of large volumes of paper records by converting them into digital form. The project has resulted in a significant improvement in customer satisfaction levels as queries can be handled much more quickly. Projects such as these typically enjoy a return-on-investment within a six to 12-month period.

Paper-heavy processes

Despite such positive examples, there are still many organisations that remain heavily reliant on inefficient, paper-based processes when dealing with customers. They may need customers to manually fill in paper forms with their details or require agreements and contracts to be physically signed and returned.

The costs associated with these laborious manual processes are significant. As well as the customer's time required to deal with them, staff must also process large volumes of paper as they move through the company's workflows.

There are also costs associated with transportation and storage. A large organisation can process tonnes of paper in the course of a year which must be filed for short-term access and then transported to off-site storage for longer term retention. Should those documents be required in the future, the time and cost associated with retrieval can also be significant.

Transforming workflows

A successful digital transformation journey comprises a series of key steps. By following them, an organisation can boost customer service levels and also significantly improve internal workflows. The steps to follow are:

- **Understand** – The first step is to gain a thorough understanding of exactly what it is you are trying to achieve. How can customer-facing processes be improved? Where can inefficiencies be removed? How might existing workflows be streamlined? By consulting with all parties involved, it becomes possible to map business process and information flows. Each can be examined in the context of the organisation's long-term strategic goals and key performance indicators created to monitor progress.



- **Improve** – Once the strategy has been formulated, attention can then shift to designing a new information infrastructure. Consider using external consultants and experts who are able to recommend technologies that are the best fit for your organisation. Making the best investments at this stage will ensure long-term value is achieved.

- **Transform** – Working with your partner, deploy the selected technologies across the organisation. Take time to confirm they are streamlining workflows and improving customer service levels. This step should also involve the training of all staff to ensure they understand the new systems and how they can get the most value from them.

- **Govern** – With the new digital platform in place and operational, it's time to monitor the adoption of new business practices against the previously defined KPIs. The performance of new workflows should be monitored and any bottlenecks or inefficiencies identified for action.

- **Optimise** – Digital transformation is not a set-and-forget activity. All workflows and processes must be continually improved to ensure maximum value is obtained across the organisation. Obtain feedback from both staff and customers on what is working - and what isn't - and make any changes required.

Undertaking a digital transformation project can have a rapid and significant impact on an organisation and the way in which it serves its customers. Taking the time to assess workflows, deploy suitable technologies and then monitor progress will ensure maximum value is realised.

Damian Aivaliotis is Product & Marketing Manager Application Services at Ricoh Australia.

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Forensics to remediate problem data

A new tool to help corporations and government agencies combat problematic or sensitive data has been launched by AccessData Group, a provider of integrated digital forensics and e-discovery software. AD RTK (Risk Toolkit) locates potential information risks -- very often, authorised data residing in unauthorised locations, such as classified information on an unclassified network -- and remediates it across the enterprise.

AD RTK is operated from a very simple user interface, which means that technical and non-technical teams alike can act quickly to initiate a first-pass scan, flag potentially problematic data and take immediate action to remediate or destroy the risk.

This enables all teams across an organisation -- such as HR, Legal and Compliance -- to take a more pro-active role in helping to protect the company's sensitive data and reduce the risk of data loss and potential breach. The tool also functions as a more easily deployed and more affordable solution for organisations that lack the IT budget for an expensive data loss prevention software product.

The primary examples of common information risks residing on enterprise IT networks unbeknownst to the organisation's leadership include improperly retained Personally Identifiable Information (PII), such as credit card numbers, Medicare numbers, classified data (for government agencies or suppliers), and unapproved software applications stored on the network. In addition, the new General Data Protection Regulation (GDPR) that goes into effect across the European Union in May 2018 identifies strict guidelines for how personal data can be processed, shared and stored by organizations.

AD RTK can run scans of thousands of computer endpoints and network share repositories once at a time or it can be scheduled for recurring jobs to ensure ongoing vigilance.

Basware speeds up invoice processing with machine learning

Basware has announced the availability of smart coding to help further automate invoice processing of non-PO invoices through machine learning.

Smart coding eliminates the need to manually code invoices when there is no purchase order (PO) associated with the invoice. The system does this by automatically identifying where the costs should be allocated to speed up invoice processing and improve productivity.

"Traditionally, non-PO invoices are automated with business rules that are laborious for customers to manage. To create a more touchless process, we developed an intelligent algorithm to determine the most accurate cost allocation for non-PO invoices.

"The solution uses machine learning to analyse customer's historical transactions and then provides a highly reliable recommendation to the user," says Sami Peltonen, VP of Purchase to Pay Product Management, Basware.

Finding a correct cost allocation is typically a challenging task for employees who are not familiar with bookkeeping rules, especially when there is no purchase order to copy information from. Smart coding automates those manual steps, so employees can easily code an invoice with a click of a button. The smart coding algorithm searches through transaction history, automation rules and shared coding templates to determine the most logical cost allocation. The only step required of the user is to review and confirm the suggested cost allocation. Not only does this simplify the process for the user and save time in processing the invoice, it also reduces the need for the AP department to rectify erroneous coding lines.

"Through the years, we've worked closely with our customers to simplify their operations and help them spend smarter through

forward-thinking approaches to automating finance and procurement processes," said Ilari Nurmi, SVP of Purchase to Pay Business Area, Basware.

Yass Valley Council chooses MAGIQ

Yass Valley Council located in the Southern Tablelands of New South Wales has chosen to implement the MAGIQ Enterprise council management system.

MAGIQ Enterprise is a fully web-based, cloud deliverable suite of financial administration and council management systems. The product suite features comprehensive Finance, Payroll, Regulatory & Compliance, Revenue & Property, Community Engagement and Human Resources systems.

Council's decision to implement new business systems was driven by dissatisfaction with the customer service and product development provided by its existing vendor; leading to a lack of confidence in the vendor's ability to meet Council's future business needs.

"As an organisation we've recognised that we need to be progressive and fully embrace change in order to achieve best practice and meet our community's increasingly high service expectations," said Sharon Hutch, Director of Finance and Corporate, Yass Valley Council.

"In selecting a business systems vendor, we were looking for a similar commitment to best practice and innovation. We're confident MAGIQ Software is the right vendor for Yass Valley."

Yass Valley Council has used the MAGIQ Documents software suite for several years.

"We're incredibly excited to be the first council in NSW to implement MAGIQ Enterprise. We see this as a fantastic opportunity for all of our stakeholders; our community, our staff and our elected representatives," said Hutch.

"Frankly there has been a real lack of viable alternative system options available and we see MAGIQ Software presenting an enormous opportunity for the local government industry, particularly for smaller councils like Yass Valley."

Council will also implement the MAGIQ Performance Suite of Budgeting, Reporting and Analytics and Strategic Planning software to improve the efficiency of Council's strategic, operational and statutory reporting processes.

compareDocs & iManage Work 10

DocsCorp has announced that its document comparison tool, compareDocs, now integrates with the new iManage Work 10 Professional Experience on Windows desktop and in the cloud.

The device-independent "smart" integration style provides iManage users quick and easy access to desktop and cloud versions depending on the device. Using new compareDocs Smart Integration, when iManage Work 10 users select the compare button in iManage, they can choose to open the desktop version installed on their Windows machine or compareDocs cloud* if they are working from a Mac, Windows or mobile device that does not have compareDocs Desktop installed.

The compareDocs cloud app is compatible with macOS, iOS, Android, and Windows and works with every browser that supports iManage Work 10. When using compareDocs on iPad, documents can be loaded in from available drives including Dropbox and Google Drive.

Commenting on the release, DocsCorp President and Co-Founder Dean Sappey said, "Using Smart Integration iManage Work 10, users can seamlessly switch between desktop and cloud versions of compareDocs. "This means that fast, accurate and reliable document comparison is no longer limited to the desktop -- it's available wherever you choose to work."

**This requires a compareDocs cloud license*

Electronic invoicing sweeping across Europe

by Carsten Heiermann, CEO of Foxit Europe

This may be the first time you've heard the word ZUGFeRD, but those working with the European market probably already know of it. ZUGFeRD, a HGerman acronym for the "Central User Guide for Electronic Invoicing in Germany", was developed to add long-needed standardisation to the e-invoicing format.

Flat PDF invoices are easy for humans to read, but it's not an easy task to input the information into ERP, accounting or archiving programs. In contrast, Electronic Data Interchange (EDI) has been used to transmit invoice information between large companies – but the format is incomprehensible to a human reader. EDI uses structured data to move the invoice information from machine to machine, with little human involvement necessary. However, to implement it requires a bilateral agreement between two companies, agreeing what data is to be shared and how it will be structured. As the data is not for a human reader, software to process the invoice must be developed or purchased.

The ZUGFeRD standard aims to bring the benefits of EDI – lower processing costs, reduced human error, ability to automate processes – within the reach of companies that may only need to process invoices sporadically, or don't have the resources to implement EDI systems. It does this by aiming for the best of both worlds. An XML file containing the structured invoice data is embedded within the PDF. The XML data can easily be pulled out by machine, and as it follows a standard

format, no bilateral agreement is needed. For those who want to manually check an invoice, the PDF shows all the information in clear, human-readable form.

Another important benefit is that the ZUGFeRD standard makes use of PDF/A format for long-term digital archiving. PDF/A is already widely used to store digital invoices, and with the PDF/A ISO standard part 3 (PDF/A-3), embedding of any file type was introduced as a PDF/A feature.

ZUGFeRD uses that file embedding by attaching the invoice data XML file, meaning both the human and machine-readable parts are stored together for records in just one file. Similar to the PDF/A and PDF/A-3 format itself, the embedded ZUGFeRD XML is a non-proprietary standard either.

ZUGFeRD's final version was released in Germany in June 2014, and work is already underway to make it a national standard – but its international ambitions have been clear from the start. ZUGFeRD is based on existing EU and international standards, so get ready to see it adopted at least continent-wide before long.

The German e-invoicing forum has worked hard to ensure that the ZUGFeRD standard will not rely on any third-party software. The full specification is freely available from their website at http://www.ferd-net.de/front_content.php?idart=940.

Of special note, when it comes to B2G (business to government) invoicing, the EU Member States are required to implement European e-invoicing between the public sector and its suppliers by November 27, 2018.

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An Intelligent Blueprint for Managing Document Workflow

By Ken Neal, Canon Business Process Services(US)
The Dow tells you how stocks are performing this very minute. Your dashboard tells you how your car is performing this very second. An electrocardiogram tells you how your heart is performing beat by beat. Yet when it comes to measuring the performance of document management activities (such as mail/shipping and print/copy centre operations), many businesses rely on quarterly results in spreadsheets and PowerPoint presentations. By most standards, monthly is very aggressive.

Unfortunately, real-time or near-real-time performance management is elusive in business and nearly nonexistent outside of one's core competencies. Although a manufacturing company, for example, may use a dashboard to monitor the production line in real time, it can rarely monitor the supply chain so closely, much less operations like document processes. But support operations cost money and affect results almost as directly as the core business.

There is a fresh approach to meeting these challenges; one that I will explore in this article. This approach leverages the potential of applying business performance management (BPM) principles to advance document performance management (DPM) workflow in a way that enables organisations to reduce costs; better manage documents as vital strategic, financial and information assets; and secure positive returns on investments from outsourcing.

A New Blueprint

DPM can be seen as a subset of business performance management. BPM itself is a business and technology approach for setting strategic objectives, identifying the activities to reach them, quantifying performance of those activities, measuring success (or failure) in near real time and systematically improving deficiencies until the strategic objectives are met.

BPM is most prevalent in industries with performance metrics that are easy to define, quantify and collect. One such industry is manufacturing, where automated devices churn out quantifiable production data. BPM, however, offers a relatively new blueprint for managing and measuring such document processes as mail distribution, copy, print, imaging, records management and e-discovery.

One reason BPM is new to these areas is that companies tend to see document processes as a fixed cost of doing business - a monolith of red tape. And unlike a production line, document processes don't overtly and obviously generate data that is plainly measurable against strategic business objectives. Whatever mail comes in just gets processed. Whatever time it takes to manage records archives is the amount of time it takes. The number of printers you own is how many you probably need, and how many copies they pump out is driven by one thing: somebody's need for a copy.

That view is evolving as forward-looking companies find ways to translate document processes into hard numbers that inform a "balanced scorecard." And to address deficiencies, more organisations are beginning to use systematic quality initiatives like Six Sigma, Lean and 5S.

Let's take a closer look at the balanced scorecard, which provides a framework for measuring business performance that transcends shortsighted financial considerations. As its name

implies, the balanced scorecard envisions organisations balancing today's financial performance with perspectives like the voice of the customer, human resources (HR) and operations. A company might want to know whether customers are satisfied, employees are continuously learning and improving, and operations reflect best practices.

Each of these four perspectives encompasses strategic objectives as well as the set of activities required to reach the objectives. Each activity is discretely quantified, measured and monitored in near real time in terms of volume, accuracy and timeliness. These activities roll back up into the four perspectives of the balanced scorecard — financial, HR, operations and voice of the customer — enabling any organisation to instantly and objectively assess performance from the macro to the micro levels. It's important that the BPM system encompass all document processes across all divisions and geographies, whether activities are insourced, outsourced or a combination of both. Otherwise, the organisation is simply building new silos that will eventually need to be integrated with the rest of the enterprise.

Defining Objective Metrics

Since there are many ways to talk about document performance management, let me spotlight a few terms for clarification:

- A service level agreement (SLA) is the contract an organisation has with a service partner requiring the partner to perform certain functions at a predetermined proficiency level; e.g., process all incoming mail within four hours of receipt, ensure 98 percent uptime on all print/copy/fax machines or produce any archived record within 30 minutes of a request. Very often, incentives are included in an SLA if the service provider meets or exceeds certain excellence benchmarks. Conversely, there are penalties for underperformance. These provisions equate to a performance guarantee.
- A metric is typically a percentage or ratio, such as on-time performance percentage or accuracy percentage.
- A measure is a data point; e.g., 1,000 mail pieces.
- A key performance indicator (KPI) is a metric that an organisation monitors through a DPM system to gauge compliance with an SLA and to make progress against a balanced scorecard. KPIs should be specific, measurable and results-oriented.

Which KPIs do you Use?

Although the terminology is easy enough, several challenges arise with KPIs. One is deconstructing a KPI into the right set of metrics, or truly relevant SLAs, to clearly chart progress toward strategic objectives. A second challenge is finding indicators that can be "rolled up" into a DPM dashboard that enables a senior manager to view, at a glance, current overall performance against strategic objectives. The wrong KPIs can steer an organisation off course.

Whichever KPIs you choose, you can't etch them in stone. KPIs must be dynamic. Years ago, a bank, for example, might have set as a key performance indicator the percentage of paper statements mailed on time. Technology has made that KPI virtually obsolete. A better metric for today might be the percentage of accurate electronic statements posted.

It also makes sense to rank KPIs in terms of importance. The same bank during an economic crisis might place a special focus on three or four critical KPIs in addition to the metrics it monitors during stable business conditions.

In general, you should have only as many KPIs as you need for a clear and effective view of your performance that leads to actionable results. By definition, a few KPIs tell the story of the rest. Just as a person driving a car can read only so many gauges — speed, RPMs, engine temperature and fuel level — a business can only monitor so many performance indicators before they are no longer key but superfluous. Cost per mail piece, for example, has implications for financial performance and volume management, so additional KPIs on these counts may be redundant.

Once you understand the building blocks of DPM, the trick is putting them to good use. Following is a brief case history illustrating how an insurance company examined its processes, developed KPIs and a balanced scorecard, and improved performance.

A life insurance company receives 40,000 claims per month on individual life, group life and annuities. It scans the claims into images, making them easy to process. Quick claims processing is a critical differentiator for the highly competitive, word-of-mouth-driven insurance industry. Processing claims in hours instead of weeks makes a big impact on customer satisfaction, market share and profit.

Despite suspected overstaffing, the insurance company was reporting substandard turnaround for receiving mail and scanning it into the database. Poor grades were based on anecdotal feedback from internal departments, which had no view into the scanning process. No metrics were in place to judge scanning timeliness or accuracy against service level agreements.

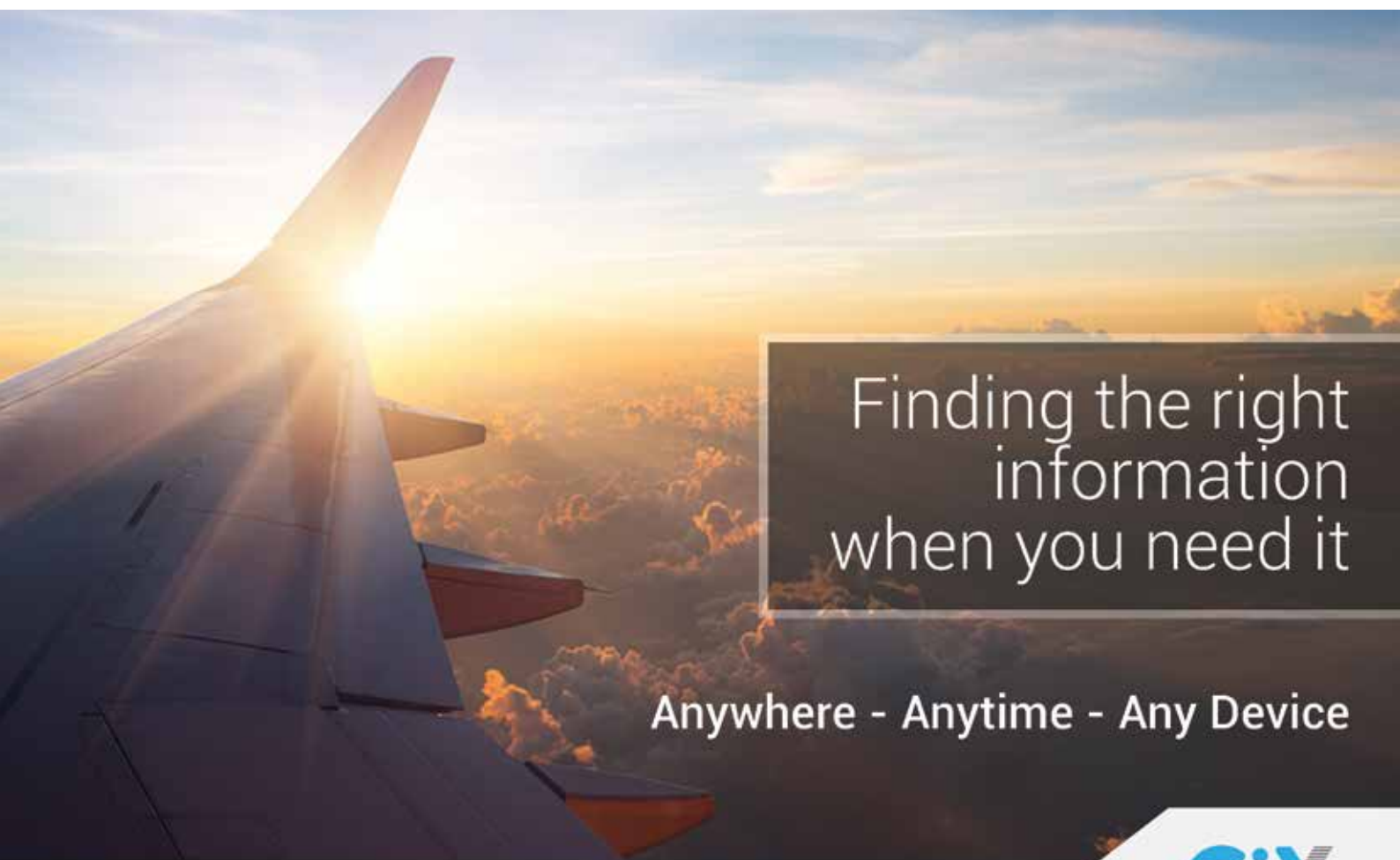
The insurance company engaged a firm to manage the scanning process and deploy a best practices team. Led by a Six Sigma master black belt, the team applied BPM principles to the problem and documented all processes, implemented performance tracking and reporting, helped the client define an objective scorecard and associated metrics, analysed true cycle time performance, recommended changes and kept the client apprised of progress.

Objective measurement of KPIs indicated that work was in fact occurring within deadline, but that there were more efficiencies to be gained. Productivity could increase without redesigning workflow. Rather, the organisation could better align staff with mail volume and eliminate interruptions.

Better staffing saved the insurance company more than \$150,000 annually in labor expenses. Staffing was reduced from 28 to 21 full-time equivalents. Cycle times were reduced from four hours to two hours. The client is now able to manage using an objective and balanced scorecard and has decided to outsource all of its document processes.

Whether survival or shareholder value is at stake, organisations can make surprising advances in meeting strategic business goals by driving continuous improvement in their document processes. Gone are the days of making decisions about these processes without a deep view into them. Using innovative DPM systems, tools and methodologies, businesses can feel confident that they are measurably improving operational efficiency.

Ken Neal is director of corporate communications for Canon Business Process Services (US). This article originally appeared in the May 2017 issue of Workflow.



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When two councils come together

They say that breaking up is hard to do, but sometimes the joining up thing can be even harder, especially when this involves bringing together previously distinct and separate organisations - combining people, processes and platforms. More than 80 local government authorities across NSW faced this dilemma in 2016 following the state government mandate to force council amalgamations

Two regional councils combined as part of the sweep were the City of Dubbo and Wellington Council, located 50km apart on the fertile western plains of NSW. Both were fortunate to have many IT systems in common, but still faced the issue of having different software versions and data sets.

The former Dubbo City Council was running HP Records Manager 8.1, while the former Wellington Council was running HP TRIM 7.3. Along with the data merger Council chose to upgrade to the latest version available, HP Content Manager 9.1

The merging of Council's major business systems including the EDRMS was a key priority identified shortly after the amalgamation was announced. The City of Dubbo was dominant in terms of staff numbers, with 320 networked users versus 90 at Wellington, which allowed for a simple decision made early on to use its platforms and processes as a base.

Matthew Green, Manager Information Services at the merged Dubbo Regional Council, said "We were lucky that both councils

The beautiful tree-lined Macquarie River that runs through Dubbo and the lush farmland of the Great Western Plains.

ran the same EDRMS. Both systems at the former Councils were integrated with Council's ERP (Civica Authority). A key challenge in the project was to maintain linkages in the merged dataset."

"The main drivers to merge datasets was to ensure all staff had access to all available information and to ensure business processes could be harmonised across both branches of the newly formed Council.

"Staff need to be able to instantly view all documents associated with a property or person," said Green.

At the outset of the project, solutions provider Information Proficiency was engaged to provide assistance with Scoping, Design, Technical Implementation, Documentation and Training.

Every record in the new EDRMS must be linked to a Name and Address Register (NAR) or Property record in the merged Civica Authority ERP, or council day to day operations would be unworkable. This challenge was multiplied across different modules in Authority for Property and Rates, Water Billing and Customer Requests.

These modules could all have been tackled individually but Council chose to bite the bullet and do all at once, which took a team of 35 ERP subject matter experts across the combined council nine months to achieve, in tandem with Information Proficiency. There were another 10 staff working on the EDRMS merger in parallel.



"Information Proficiency was particularly helpful here as their consultant Simon Blunt has extensive local government experience and has worked for Civica, so having the knowledge of both the TRIM product and Authority was fantastic," said Green.

"We began the migration in September 2016 and achieve go-live on July 3, 2017."

For other organisations facing the merger challenge, Green recommends ensuring having the appropriate resources on hand.

"Using existing resources can be troublesome if staff are required undertaken their usual role as well as project work. In our case, this lead to very high workloads for some staff," he said.

With the newly merged dataset, HPE Content Manager 9.1 is now hosted in Council's Dubbo-based data centre. Wellington staff access the consolidated system over a high speed microwave link that was also constructed as part of the amalgamation.

Simon Blunt, Service Delivery Manager - Eastern Australia, for Information Proficiency, said, "The main challenge was combining the two production datasets into a single dataset to achieve a 'single source of truth.'"

"This phase required that we examine the record types in both datasets, as well as the classification structures.

"We combined and rationalised these with input from both records management teams."

Dubbo/Wellington Amalgamation Hit List

Harmonisation of Council's ERP (Civica Authority) including modules such as Property, Rates, Water Billing, Accounts Payable, Accounts Receivable, Payroll, Assets, Purchasing, Applications and Customer Request Management.

Harmonisation of the two Councils EDRMS to HPE Content Manager 9.1

Harmonisation of GIS – Standardised on Geocortex and a ESRI backend

Harmonisation of Email – Moved from on premise exchange servers to Microsoft Office 365

Consolidation of data centres - Wellington migrated to the former Dubbo facility.

Broadband Connectivity – A 1Gbps Micro-wave link was established between the offices.

Standardised Operating Environment – Moved from traditional desktops to virtual desktops.

Standardised Communications Systems – New Unified Communications System (Phones) and Two-way system are being installed.

The two collections of Locations data were deduplicated, and related records managed, while additional fields were rationalised and the data migrated.

External link data was migrated, and re-mapped in conjunction with the amalgamation of the two target line of business systems.

Also, as the two EDRMS implementations used different security models, security relationships for locations and records needed to be migrated while record relationships were maintained.

With the merged business systems now bedded down, council can now address the challenge of digital transformation.

"I'd say both Councils had a long way to go in terms of eliminating paper.

"The primary objective was to "merge" the systems. Improvements to business processes were put in if the opportunity presented itself, however this wasn't the priority," said Green.

"We still have a lot of internal processes that result in a form that must be scanned and placed into the EDRMS.

"In Phase 2 we are now looking to implement new Civica modules that will address internal paper-based processes in timesheeting and leave applications."

"We also have a lot of work to do importing a lot of unstructured data that lives in shared drives used by both councils."

Cloud users in the dark about Data Governance, Study finds

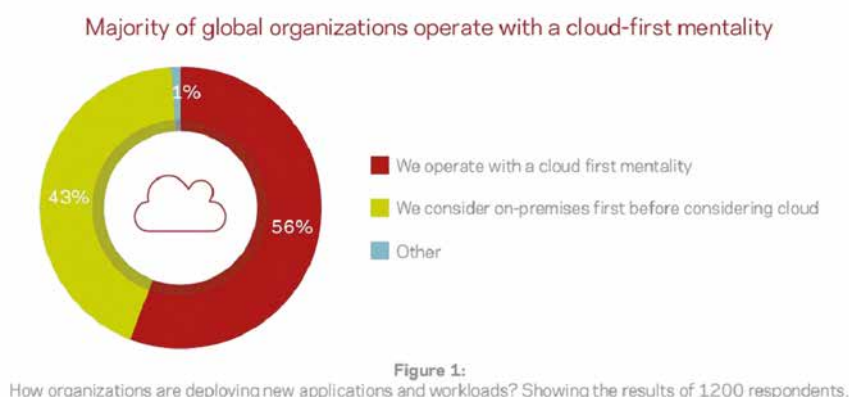
Veritas Technologies has announced the results of a global survey spanning thirteen countries indicating that the majority of global organisations (56 percent) operate with a cloud-first mentality when it comes to deploying new applications and managing workloads.

However, the study reveals that significant misconceptions exist on the responsibility for data management, with 69 percent of organisations wrongfully believing data protection, data privacy and compliance are the responsibility of the cloud service

cloud service provider to back up workloads in the cloud.

More than one in two (55 per cent) of organisations also believe that application uptime is the responsibility of the cloud provider.

"Our legal teams reviewed contracts from multiple public cloud service providers to help Veritas understand what customers and cloud service providers are responsible for with respect to data management in the public cloud," said Mike Palmer, executive vice president and chief product officer, Veritas.



provider. Only one percent of organisations reported that they will not be adopting cloud over the next two years.

The Truth in Cloud study, conducted by Vanson Bourne, surveyed 1,200 global business and IT decision makers revealed that customers are embracing the multi-cloud as a key component of their business strategies.

Within the survey, customers indicated they use a variety of cloud service providers, including public clouds and hosted private clouds.

With respect to Infrastructure as a Service (IaaS) specifically, over two-thirds (67 percent) of organisations state they use, or plan to use, two or more cloud providers.

Forty-two percent say they are using, or plan to use, three or more cloud providers, with common goals of improving resiliency and data security as well as reducing capital expenditures (Capex) and operating expenses (Opex).

Although organisations are adopting a multi-cloud approach, the research shows that when it comes to public clouds specifically, there are likely misconceptions around which party holds the ultimate responsibility for data management: the customer or the cloud provider.

Key findings include:

- More than eight in ten (83 percent) of organisations that use or plan to use IaaS believe that their cloud service provider takes care of protecting their data in the cloud.
- More than two-thirds (69 percent) of respondents believe they can place all responsibility for data protection, data privacy and compliance on cloud service providers.
- Over half (54 percent) of organisations believe it is the responsibility of the cloud service provider to securely transfer data between on-premises and cloud.
- Over half (51 percent) believe it is the responsibility of the

"Despite customers' belief that cloud providers hold the responsibility of data management, cloud service provider contracts usually place data management responsibility on customers. Our research backed up our assumptions that the primary responsibility for data management lies with the customer," Palmer added.

"Veritas fully embraces a multi-cloud approach and is partnering with many leading cloud service providers to help customers manage and extract maximum value from their applications and data."

Rise in Multi-Cloud Adoption

The Truth in Cloud research also shows that on average, organisations are using, or plan to use, multiple cloud platforms, ranging from public clouds to hosted private clouds. However, many organisations continue to face challenges getting to the cloud regardless of whether it is a public cloud or a hosted private cloud. The common barriers are:

- Complexity with cloud migration (37 percent).
- Legacy technology limitations (36 percent).
- Lack of in-house skills (38 percent).
- Lack of a clear strategy (32 percent).
- Data silos (27 percent).

Currently, 75 percent of organisations work with an IaaS public cloud provider and surprisingly, 16 percent of respondents say that they use, or plan to use, five or more cloud providers. Respondents stated that data privacy, security and compliance, workload performance and uptime are the top deciding factors impacting cloud provider selection.

The full *'The Truth in Cloud'* study is available at <https://www.veritas.com/content/dam/Veritas/docs/reports/veritas-truth-in-cloud-results-analysis.pdf>

Meeting The Omni Channel Challenge

By Mark Grimes

Other than sounding like a new reality television gameshow all organisations are facing a barrage of incoming and outgoing documents through many channels.

One area which is coming under increasing pressure is that of complaints management. In the past, these were typically received in the mail or via telephone however now customers can use social media, apps, phone, email, paper and the list goes on. What was once a one-to-one relationship is now potentially one-to-many.

This Omni channel approach poses significant challenges for businesses not least identifying who should be dealing with the incoming item. In order to alleviate this issue, the key is intercepting the incoming content early, interpreting it and driving a case management approach off the back of this.

Artificial intelligence and machine learning is one way to help your business determine how better to deal with incoming requests. Not only in complaints but also across multiple facets of your business including account opening, queries, claims management etc.

Intercepting content early and using the natural language processing capability of today's software allows you to focus on dealing with the issue rather than determining if an issue exists and who should deal with it. Once the software has determined where the complaint should be directed solutions can now create rich case management objects. Your knowledge workers can work in this case model to determine a resolution and enrich your knowledge base of solutions to customer issues. This drives efficiency and ultimately reduces cost.

Most organisations are still struggling with being able to deliver a smooth content experience

If your organisation deals with multiple incoming content types which is used to drive your business process, then looking at AI enabled technologies to drive more efficiency is something which you should be looking at.

An Omni channel approach also provides the ability to receive incoming content no matter what the mode or form factor, and respond back in context using the same mode or form factor in a way that is consistent and clear to the customer.

For instance, most consumers have at least eight ways that they can interact with their bank, or insurance company or government agency: go to a branch or office, send a letter, send an email, scan and send a document, send a fax, call the contact centre, chat on-line or use a Mobile App.

Today, most organisations struggle with this. It's usually a poorly integrated set of different capabilities that operate at different speeds with different gaps and bottlenecks.

In many cases these processes are not connected. Digitally-born process are far faster than paper or Digital Document processes and all these gaps are problematic.

To plug these gaps requires an integrated back office process, actually a Digital Business Platform (What we used to call Enterprise Content Management!).

This contains Document Capture to handle paper and electronic documents, ECM repositories for the storage and retrieval, Case Management for managing processes and customers, and a public-facing Content Repository.



Traditional capture systems are great at capturing known and predictable document types such as forms. They create an image, extract values from some pre-defined areas on the form and store it all somewhere. But much of the really important information entering an organisation is not on a form but is in a letter, in an email message or in a PDF file. And traditional document capture systems just can't handle that sort of unstructured data.

Unlike traditional document capture systems that rely on human intervention for unknown or variable documents, cognitive capture automates the processing of document transactions using a combination of advanced document imaging, content analytics and machine learning techniques to process all document types, including those with highly variable content and unknown formats.

And – very importantly - Records Management and Governance solutions are required for a Certified Records Chain of Custody throughout the life of each document.

Most organisations are still struggling with being able to deliver a smooth content experience and those that do have a higher customer satisfaction. Recent analysis by Forrester has found that cost reduction is becoming less of a driver for business process improvement efforts today, which are instead being devoted to providing a Digital Business platform that is better able to manage customer servicing and on-boarding.

Many struggle with bespoke document management solutions that are created with a process specific metadata model, and so the documents are invisible to other process solutions.

There is no link between customer and document (documents are typically indexed to an application or product id. So, nobody knows what is stored in the enterprise and as a result customer service is poor. Acquiring true Omni channel capability requires a unified customer view, regardless of which product, channel or employee a customer engages with.

Mark Grimes is Managing Director of Australian content management consultants Blumark

www.blumark.com.au





Plug your data gaps before the 2018 Data Breach deadline

By Seth Butcher

Deadlines tend to creep up on you. For many Australian organisations the effective date of 22 February 2018 for new Mandatory Data Breach Notification Laws is getting scarily close, while those who ignore it in 2017 will need to hit the ground running in the new year to be prepared.

While the legislation does not apply to local councils and state government agencies, it hits hard in the private sector. Any organisation with an annual turnover greater than \$A3 million is covered which means it's not just an enterprise issue, many SMBs are caught in the net.

It's not just the Big Banks, utilities and large federal government agencies that need to be concerned, the impact will be felt at many schools, universities, surgeries and Not For Profits (NFPs).

And concerned they should be, given the severity of fines able to be applied under the Act: up to \$A360,000 for individuals and \$A1.8 million for companies. Australian Privacy and Information Commissioner, Timothy Pilgrim provides some helpful advice here, saying, "agencies and businesses should continue to take reasonable steps to make sure personal information is held securely - including being equipped with a clear response plan in the event of a data breach."

But how can your organisation be sure that "information is held securely" as Commissioner Pilgrim advises?

Especially when submitting credit card details via a paper form is still a fundamental way of doing business across the spectrum.

Even with the most secure systems in place, your biggest risk still lies in human frailty. It's widely recognised that most data loss occurs due to staff negligence or bad practices.

Just look at the most recent example where a misconfigured database backup to the Amazon cloud exposed the details of more than 50,000 Australians, including credit card numbers.

At Toshiba Australia. Electronic Imaging Division we have encountered widespread concern over the new Data Breach regime. This concern is justified with many still holding paper archives containing credit card details and other personally identifiable information (PII) data such as Tax File Numbers (TFNs). Submitting these details on paper is still a common practice for organisations both large and small across the

business spectrum. Even for those who have progressed to scanning the paper forms and implementing digital processes, these PDF forms then sit on a fileshare or in an EDRMS where they still represent a threat and a real risk under the upcoming Data Breach regime.

To help organisations deal with this threat up front rather than after an embarrassing breach, Toshiba Australia has developed a solution offering to help redact or hide sensitive data such as credit card numbers.

The solution is able to automate the task of discovering and redacting PII data such as credit card numbers or TFNs in a repository of PDF or Word documents. blacking them out so they cannot be read. It's fully-automated, meaning that CCNs/TFNs are automatically discovered in source documents, regardless of their location

Once the sensitive data has been redacted, you can choose whether to replace the original files with redacted PDF/Word versions, or keep the original files somewhere more secure and out of reach of your business daily operations, while maintaining the same name for the new redacted file

Security and privacy are increasing in importance and becoming more political; a challenging situation that has been compounded by frequent news of data breaches.

Organisations are facing increasing pressure to securely and intelligently manage all the data they hold, to ensure regulatory compliance, as well as protect against the very real reputational (and financial) risk that data loss or breach presents.

According PricewaterhouseCoopers (Australia), the new Data Breach regime, "present companies with an opportunity to engage with their customers on privacy protection and to build/maintain trust in an increasingly digital world. This is an ideal time to review how your company manages its information (and manages itself) to take stock of its information assets, its data protection measures (including response activities) and to ensure it minimises the risk of a breach in the first place."

For more information on how to prepare your organisation for Data Breach D-Day on Feb 18, 2018, contact eidmarketing@toshiba-tap.com.

Seth Butcher is National Solutions Group Manager at Toshiba Australia.



Does PDF/A pass muster for archiving?

Is PDF/A the right solution to long term archiving?

A German academic has published a detailed paper criticising aspects of accessibility and reusability of the format and considering the alternatives.

PDF/A differs from PDF by prohibiting features ill-suited to long-term archiving, such as font linking and encryption.

Marco Klindt of the Zuse Institute Berlin, a research institute for applied mathematics and computer science, believes the PDF/A format has shortcomings and potential pitfalls that may create problems for present and future content users. He says, "Converting "normal" PDFs to PDF/A a-level conformance automatically is not advisable as a lot of information may already be lost during the creation process of the document.

"The benefit and convenience of PDF to easily capture all kinds of textual and graphical information in an electronic equivalent of a stack of paper comes at a cost for digital archives. In the digital preservation workflow technical validation is an essential step to ensure files are valid with respect to the specification of the file format they claim to be. This process will always be costly as it involves manual assessment as the tools are not yet usable for a fully automatic workflow ..."

"Despite the reusability issues, exporting to PDF sometimes also results in significant loss of information apart from text structure. Two examples: Spreadsheet formulas and numerical precision are lost, making testing data sets more difficult. Storing OCR results as invisible text over the digital facsimiles loses the confidence values for characters of the recognition software."

However, he concedes that "there is no viable alternative to

PDF as a universal digital container of everything that can be flattened to printed pages. "PDF/A is perceived to be an archival solution for digital documents. Discussion within the community revealed the reason for that is three-fold: Firstly, it is marketed as an archival format. The A in PDF/A might stand for "Archive" or "Archival" or simply for the letter "A"; I haven't found any official explanation for the choice of A in the acronym.

"The second reason may be that it is used by so many institutions to a point where a critical mass is reached. They cannot altogether err in their risk assessment, so the reasoning is that you simply cannot be wrong when you run with the flock. And thirdly, there does not seem to be a better alternative available."

One of the strategies he suggests is to employ PDF/A-3 which allows the original source documents to be embedded and linked alongside the PDFs for full text and structure retention.

The full paper is available online at <https://ipres2017.jp/wp-content/uploads/15Marco-Klindt.pdf>

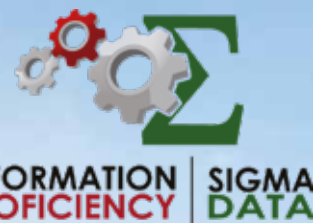
Carl Wilson at the Open Preservation Foundation has responded to the paper with *PDF/A and Long Term Preservation* located at <http://openpreservation.org/blog/2017/10/26/pdf-a-and-long-term-preservation/>

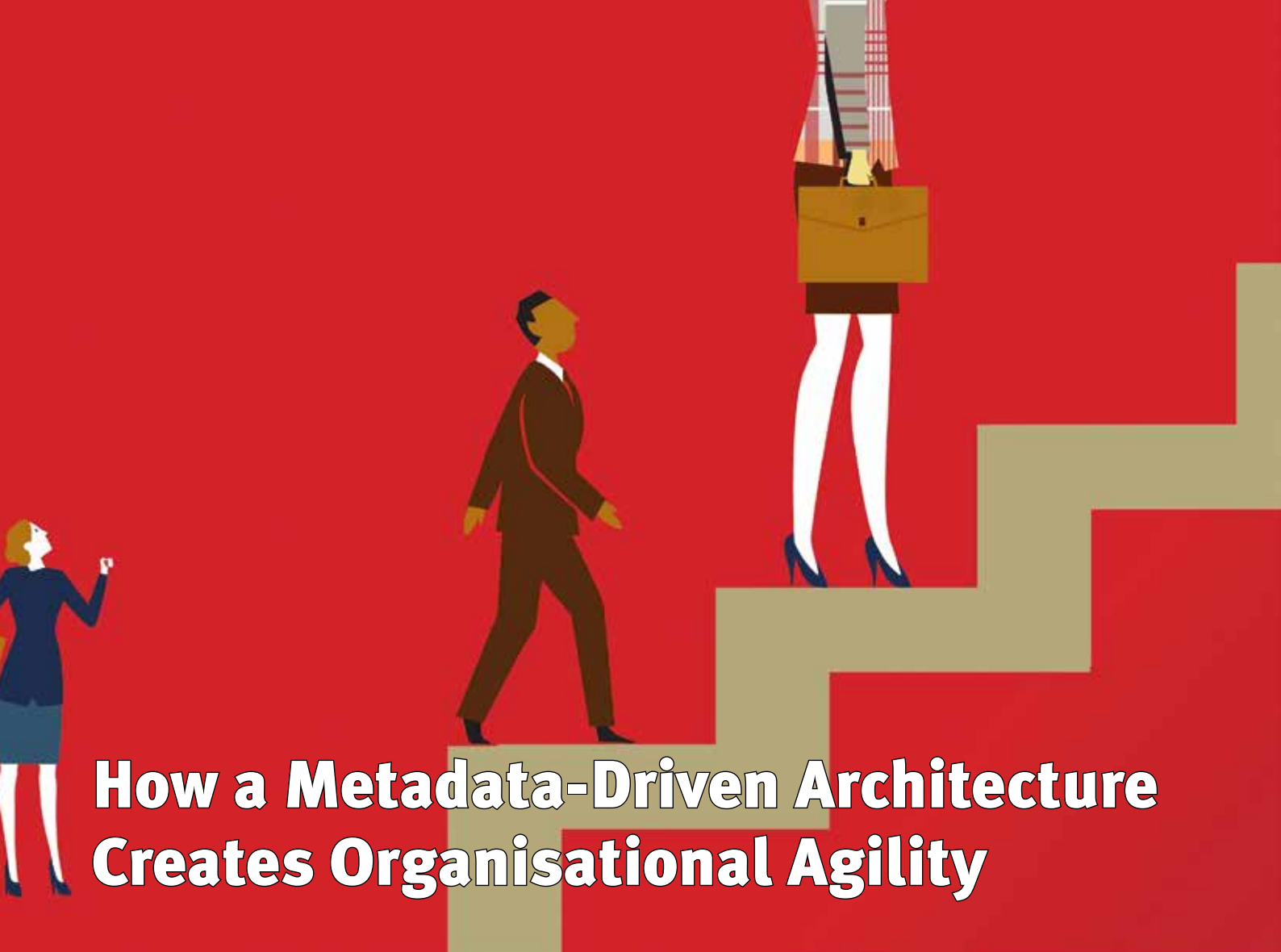
He notes that "PDF/A is not a standard you'd have designed with long-term preservation in mind. It's also significantly more complex than necessary in many cases." However, "Regardless of opinions regarding the format, a major consideration for memory institutions with a mandate for preservation is pragmatism. Governmental and commercial organisations currently make wide use of the PDF format and there seems little prospect of that changing in the short to medium term."

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How a Metadata-Driven Architecture Creates Organisational Agility

By Charles Araujo

There is an application gold rush taking place within enterprise organisations. Business leaders in every industry recognise that automation is the key to both survival and competitive advantage. And they don't want to get left behind.

The unsurprising result is pent-up demand for both new applications and functionality updates to the existing application stack. And also, unsurprisingly, IT is having trouble keeping up.

Enterprises have responded in a number of ways including increasing development resources, engaging outsourcers, and adopting both low-code and no-code development platforms to speed IT development and enable so-called citizen developers, respectively.

While this gold rush of development has helped organizations meet their short-term automation needs, it is also perpetuating an age-old problem when it comes to the proliferation of applications in the enterprise: each new application actually limits an organization's ability to be agile, increases its security risk profile, and decreases IT's ability to support more automation in the future.

The Problem with the Application Stack

There has been a mostly unstated, but very real inverse relationship between the size of an organisation's application stack and its ability to introduce further automation and innovation over time.

This conflict is because each new application that it adds to the environment brings management overhead with it in the form of

on-going maintenance and security needs.

With each new application added to the stack, the IT organisation must spend more and more of its time and resources merely maintaining the underlying architecture and identifying and closing security vulnerabilities — leaving less time to respond to new application needs or add new functionality to the existing application stack.

The latest generation of low-code and no-code application development platforms are part of the solution – but also part of the problem. They have helped organisations respond to the need for more automation and faster development, yet they continue to add to the enterprise application stack and have done little to solve this more foundational problem.

Metadata for an Agile World

Some technology companies, however, are re-exploring an approach that has been developing in the industry for some time: metadata-driven application development architectures.

This type of development architecture abstracts an entire application into a single metadata file that defines all attributes of the application and executes on a purpose-built delivery platform.

While not new, these types of metadata-driven application architectures — mostly in the form of no-code development platforms — have primarily been limited to creating stand-alone applications, as they lacked the sophistication necessary to develop enterprise-scale applications.

A new generation of such platforms, however, is extending the approach and promises to help enterprise organisations take advantage of this architecture and apply it at enterprise scale. Metadata-driven architectures, from companies like ClaySys,



enable organisations to separate application functionality from the underlying application architecture — where most of the maintenance and security challenges exist.

This abstraction allows organisations to simplify and centralise their management efforts and also enables intrinsic version control, automated rollback and extensible and reusable integrations at the platform-level — all essential elements that drive organisational agility from within the application stack.

The Significance of Abstraction

It is easy to miss the significance and lasting impact of this abstraction process — particularly its impact on the IT operational model. According to numerous studies, enterprises spend the vast majority of their resources on maintaining the organisation's technology stack.

A large percentage of that commitment is in the form of identifying and patching security vulnerabilities and maintaining the application infrastructure — critical tasks, but which add no incremental value to the organisation.

The use of a metadata-driven application architecture helps organisations overcome this operational paralysis through abstraction. When the security team identifies a new security vulnerability, they patch the delivery platform once in a central location, and all deployed applications automatically benefit from it. Likewise, when the organisation requires an update to the underlying application architecture, they update it once centrally and without any additional application maintenance — as the abstraction enables full and on-going backward compatibility.

The result is an end to the continuous stream of resource-intensive IT projects that do nothing but maintain already-deployed systems, add no incremental business value, and do

nothing to help the organization respond to changes in the market or seize new business opportunities.

Low-code and no-code platforms hold much promise for enterprise organisations. On the surface, they help them address the need to increase automation and empower business users to create applications for themselves.

But creating more automation only solves part of the problem. Enterprises must also address the need to reduce their maintenance and security overhead if they hope to increase their organisational agility and seize emerging opportunities.

A new generation of development platforms built on metadata-driven architectures, such as Claysys, help organizations solve this hard problem.

Using this type of architecture, organisations can create complex, enterprise-class applications in an entirely no-code environment. Moreover, this architectural model enables organisations to both update core functionality and patch security vulnerabilities within the delivery platform itself, rather than within individual applications — eliminating two of the most significant challenges they face as they exponentially increase automation.

Enterprise organisations are caught between the proverbial rock and a hard place. They must relentlessly increase the use of automation in every aspect of the business, yet somehow try to manage the increased risk profile and maintenance headache that comes with the increased complexity of the resulting application stack. Metadata-driven application development architectures hold the promise to help organizations finally find a way out of this conundrum.

Charles Araujo is Principal Analyst at Intellyx, an industry analysis and advisory firm focused on agile digital transformation.

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



Blumark

Contact: Mark Grimes Phone: 07 3010 9515
Email: sales@blumark.com.au Web: www.blumark.com.au

Most businesses look to technology to support their activities but as they grow and change, more systems are added and more employees create a greater number of emails and documents. Not surprisingly, IT becomes more complex and there is a risk of workflow becoming hampered by the distraction of managing essential business functions. Blumark are experts in ECM and process improvement, assisting organisations with the difficult task of managing business processes and content in an efficient and cost effective manner. Blumark becomes the organisation's trusted partner as an advisor, implementer, trainer and support provider. Blumark specialise in the content lifecycle and provide solutions for the diverse electronic and physical content types which organisations work with today. Leveraging technologies such as IBM FileNet and OnBase by Hyland, Blumark focus on delivering ECM solutions which support the way that organisations do business minimising change management, enabling users, ensuring compliance and empowering records specialists.



Kodak Alaris Information Management

Contact: Francis Yanga
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Web: www.alarisin2.com

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.

Kapish

Tel: (03) 9017 4943
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Web: <http://kapish.com.au/>

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

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

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

Phone: 1300 375 565
Email: sales@filebound.com.au
Web: www.filebound.com.au

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

Kodak alaris



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Australia

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

Contact: Byron Knowles, Business Development Manager - APAC
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Email: bknowles@opex.com
Web: www.opex.com/contact/sales-contact/

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

Contact: Clyde Rodrigues
Phone: 0429 487 013
Email: crodrigues@epson.com.au
Web: www.epson.com.au/products/scanners

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

Phone: 1300 790 360
Email: info@upflow.com.au
Web: www.upflow.com.au

PSIGEN, PSICapture is an innovative document capture platform engineered to combine automation, efficiency, stability and Enterprise-class scalability. PSI:Capture provides unmatched integration with just about any ECM 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, PSI:Capture provides a solution to meet your specific needs. Document Capture and Scanning is a challenge in any organization. With an array of scanning devices, capture needs and backend content management systems, it is ineffective to settle for multiple applications to accomplish one goal. PSI:Capture provides a single capture platform that can meet all the needs of an organisation. UpFlow is the Asia Pacific distributor for PSIGEN, PSICapture.

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How to succeed, not fail, with your social media presence

By Stewart Hollingdrake, Citadel Group
Is your organisation keen to avoid being listed as one of the Top 10 Worst Social Media Fails of 2017? Celebrities and politicians are not the only entities on social media to conduct monstrous fails. Corporations and government agencies aren't far behind.

With the rapid rise in the number of social media channels the average organisation must keep track of is it any wonder? LinkedIn, Facebook, Twitter, Flickr, Instagram, Google+, YouTube, Pinterest, RSS feeds – are you sure you are totally across what is happening across all these channels at any time of the day or night?



And how are you recording what is happening in the interactions between your organisation and the public via social media? Will you be able to defend yourself in case things turn bad, remembering that in the online world events can get out of hand very quickly!

As a specialist in providing Secure Information Management Services for the government and healthcare sector in Australia, Citadel Group realised the need for a dedicated social media scanning and logging solution.

We have worked with specialist vendor Social Safeguard to devise a solution that will integrate with Micro Focus Content Manager.

Citadel has built a reputation of managing complex and sensitive information securely and ensuring it is available

anytime, anywhere on any device. Citadel's key contracts include running Defence's Objective ECM Managed Service for over 12 years and hosting 42% of Australia's Public Hospital Pathology Transactions within our hosted Laboratory Information Management System (LIMS).

Citadel acquired Kapish in 2016 and together became Australia's only Platinum Micro Focus Content Manager (TRIM) Partner. Kapish has a strong history of building Commercial off the Shelf products that integrate into Content Manager and provide a richer user experience and facilitation of business workflows.

Citadel and Kapish have now worked together to integrate the Social Safeguard social media scanning and logging solution into the Citadel IX cloud-hosted Micro Focus Content Manager platform. The same solution is also available for customers running Content Manager on premise.

The system logs all activity within a client's Social Media channels including text, pictures, videos and screenshots of any links. This content is then seamlessly integrated into Micro Focus Content Manager through a Kapish Connector.

This seamless integration with Content Manager ensures that social media interactions are treated as official records and are categorised and stored securely with the appropriate metadata tags and disposal schedules applied. This allows access across an organisation to these records through search and the ability to link social media records with other corporate records (i.e. for a single view of a customer).

The Social SafeGuard solution also has a pre-configured rules engine with hundreds of industry-specific risks. It scans for inappropriate or risky content and quarantines the content for review and deletion. This capability protects against hacking of social media accounts by intervening when inappropriate content is detected and sending alerts if there is unusual activity (i.e. if a site is being hacked).

The solution has a threat scanning capability that looks for fraudulent or malicious social media sites, that seek to impersonate or damage an organisation or individual. The system scans social media channels each minute looking for fake accounts and can

bring to a client attention that activity almost immediately.

For further information contact sales@kapish.com.au.

Stewart Hollingdrake is the Sales Director for the Citadel Group. Stewart's recent experience has been working closely with National Security and Police to implement Mobile Technology (QLite Ipad application), G20 Geospatial Capability and Technology Refresh Programs.





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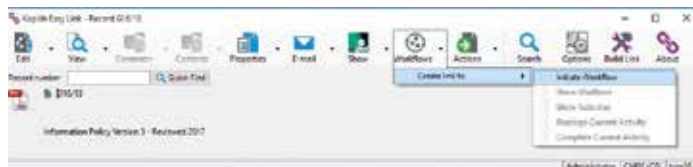
OPEX[®]
www.opex.com

Kapish CM/RM/TRIM software trio

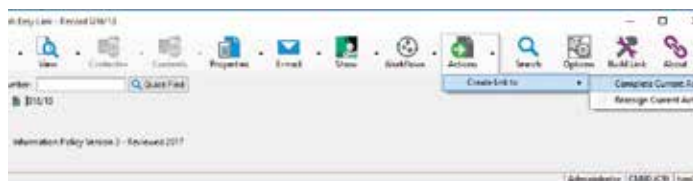
Kapish has announced a trio of new updates in its Software Product Suite, with new versions of Kapish Easy Link, Kapish Folder Wizard and Kapish Record Remover for users of Microfocus Content Manager (CM)/Records Manager (RM)/TRIM.

Kapish Easy Link 3.4 now supports Workflow, Activity & Action Links. Kapish Easy Link has always been able to be used to create hyperlinks directly to documents in Records Manager and Content Manager. Now this has been extended to enable users to create links to Workflows, Activities and Actions.

Previously, there was no way to tell Easy Link that you wanted to create a link to these elements in Records Manager. Kapish Easy Link 3.4 opens up the entire area of Workflows, Activities and Actions making it easier than ever to link to content.



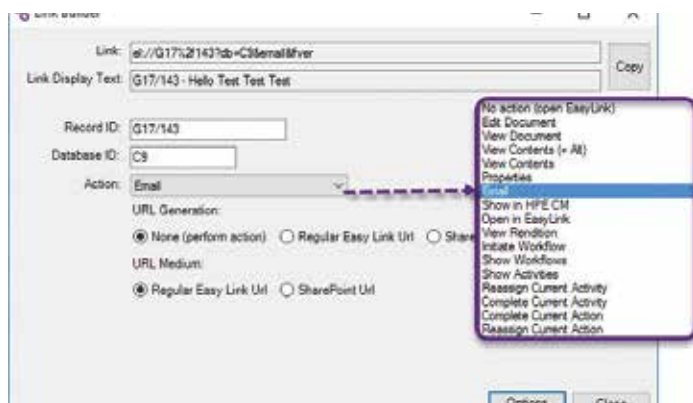
Create Workflow links in Kapish Easy Link 3.4



Kapish Easy Link 3.4 introduces Action links

Think yourself as a bit of a wiz with the code and wish you could type in the syntax to create your own complex links? If yes, then get excited because Kapish Easy Link 3.4 allows you to "Build Your Own" link.

A lot of users said they had begun to learn to compile the links themselves and wish there was a place to create these quickly and easily. "Link Builder" is now included.



Kapish Easy Link 3.4 allows you to Build Your Own Link

Kapish Folder Wizard 3.5 now directs to newly replicated structures after their creation. When replicating a folder structure, you can be taken directly to the new structure automatically after it is created. You can replicate either an existing record structure or a structure created by Kapish Folder Wizard, then once the structure is magically replicated you have the option to be directed to the new folder structure or stay with the original. Previously, Folder Wizard notified you that the structure had been replicated and provided the Record Number but the focus stayed on the record structure you were originally on. Now you can decide after replication to stay on the original or be automatically taken to the new structure.

HPE Content Manager 9.1 is also now officially supported in Kapish Folder Wizard 3.5. Customers should always consult the Software Compatibility Matrix before ever upgrading to ensure full functionality and support is available for your software version. Kapish Folder Wizard 3.5 has been updated to ensure the appropriate system name, either Records Manager or Content Manager is correctly displayed depending on which version your organisation is currently using to provide consistency for your users.

Finally, Kapish Record Remover 1.6 now supports HPE Content Manager 9.1 and the User Interface has been updated to accommodate the appropriate version of Records Manager/Content Manager. This ensures users experience a consistent and accurate encounter with the application to further enhance user engagement. Enhancements include window dialog boxes set to resize automatically and maintain appropriate ratio constraints, as well as referencing the system with the relevant product name.

If you would like to find out the new updates contact sales@kapish.com.au to arrange a FREE 30 day trial.

Foxit Software Releases ConnectedPDF

Foxit Software has announced ConnectedPDF 2.0 for the enterprise. The company also introduced version 9.0 of its PhantomPDF editor software.

ConnectedPDF features include:

Document Intelligence - Enables knowledge workers to understand how readers are using their documents after publication.

Document Security - Protects valuable document information that follows the document everywhere it goes.

Document Collaboration - Allows multiple users to be part of a single document review, spurring innovation and enabling all users to see and respond to comments in real-time.

ConnectedPDF 2.0 introduces both single-tenant private cloud and on-premise versions of the solution, with both including integration with enterprise account management systems like Active Directory to provide single sign-on.

ConnectedPDF continues to be available in a multi-tenant cloud version as well.

The latest version of Foxit's technology also includes a variety of other usability enhancements such as Document Share, which allows users to quickly, easily, and securely share information via a file link, social media, or privately to a select group of recipients.

Some of the new features available in PhantomPDF 9.0 include:

PhantomPDF Online- Bundled with Phantom Business, Standard and Education editions, this new feature enables users to access PhantomPDF functionality through a browser from any computing device.

Section 508 Compliance -The software is compliant with Section 508 of the US Workforce Rehabilitation Act requiring access for the disabled.

PhantomPDF can also assist authors in generating 508-compliant documents by allowing them to insert tags to determine reading order, set alternative text, check documents for 508 compatibility, and help fix compatibility issues that are discovered.

The solution includes integration with JAWS (Job Access With Speech), the screen reader program for Microsoft Windows that allows blind and visually impaired users to read the screen either with a text-to-speech output or a refreshable braille display.

Advanced editing - Improves editing efficiency by linking all text blocks throughout a document so users can edit text without worrying about text reflow and image overlaps.

<https://www.foxitsoftware.com>

Simple setup the key to scan strategy

While it's fair to say that BYOD and the wider use of mobile devices resulted in a steady decline in paper usage - the reality is that the paperless office is still a pipe dream for most.

It's not that we are lacking the technology to go paperless, it's that we don't want to get rid of paper in our day-to-day activities. One of the biggest barriers to transforming from paper-based to paper-free processes is a resistance to change, and despite the contention that hard copy workflows are an inhibitor of efficiency and growth, people keep using paper because that's what they have always done.

In fact, one of the key findings of a digitisation and workflow automation study by Quocirca was that paper remains a key element of many businesses. Quocirca interviewed 200 organisations in the USA, UK, France and Germany, and respondents reported that 27 percent of business processes are paper-based. The top reasons cited for paper were: physical signatures (55 percent), customers/suppliers require it (48 percent), and most notably, that staff prefer paper (41 percent). And while a clear majority of organisations recognise that the digitisation journey is one they are keen to begin, 62% cite complexity as the main barrier to deploying information capture.

The Kodak Alaris strategy begins with making the scanning process simple to setup

Configuring scanners can be a time-consuming task for reseller personnel and IT professionals, especially when there are multiple devices that need to be set up. And often end users will change device settings, which can impede productivity for subsequent users. Kodak Alaris' EasySetup feature, which debuted on the i1190WN and i1150WN models, alleviates these hassles with a first-of-its-kind automated configuration process. The technician tasked with deploying the scanner simply enters the desired settings information on Kodak Alaris' online EasySetup portal, prints the resulting configuration page, and scans it on the target device to enter the settings. Moreover, EasySetup sheets can enhance network security by allowing the administrator to enable password access on the scanner without the user ever knowing the password

Kara Rayburn, World Wide Portfolio Manager, Information Management at Kodak Alaris, said "Our latest generation of scanners the Alaris S2000 Series are compact and easy to use and they allow our users to more than just capture text and push it on through somewhere. People need to be able to create usable data and have the ability to automatically send it where it needs to go."

All of the new S2000 Series scanners include a Limited Edition (LE) of Alaris Info Input Express software to provide the ability to initiate intelligent workflow and provide a personalised interface. Previously, only the high-end i5000 series of scanners had the inbuilt ability to use a separator sheet with a QR code to initiate processes with scanned documents. Using the bundled Info Input Express LE or Capture Pro Software now provides this capability to every S2000 Scanner model.

The scanners also include Intelligent Exception Processing to handle immediate validation of forms so any missing information can be identified and fixed at the point of transaction. Imagine the scenario of a loans officer and a mortgage applicant working through dozens or hundreds of pages in a lengthy application form that require signatures or ticks in multiple boxes, using Capture Pro software the scanner can watch for exceptions and immediately issue an alert.

A new cataloguing capability with Info Input Express makes a list of everything scanned and where it was sent so if you later on can't remember where it is you can find a scanning job by date and name and get a link to where it is. Also included with Info Input Express LE is the ability to provide up to 20 individual buttons for unique workflows via the S2000 Series Scanner control panel

Intelligent Job Select is a new feature in Capture Pro and Info Input Express Software that works in conjunction with scanners to automatically index documents and reconfigure the scanner with the best settings for a particular document type.

Separator sheets coded with job configurations are inserted between jobs within the same stack, and the software automatically switches properties as the pages are scanned. This feature works across multiple sized batches and multiple types of documents, up to the capacity of the scanner's feeder. This completely automates some of the activity spent prepping documents for scanning, and reducing manual steps in the process. Kodak Alaris is seeking to engage more partners that can build unique solutions based on its software APIs and SDKs, rather than just sell scanners.

The company has also begun rolling out a new Managed Service offering for direct sales accounts in the US, UK and German markets which will soon be offered worldwide.

<https://www.kodakalaris.com/en-au/>

ManageEngine adds SharePoint/O365 migration capability

US firm ManageEngine has enhanced its SharePoint management, auditing and reporting solution, SharePoint Manager Plus, with the ability to migrate on-premises SharePoint components to an Office 365 environment while monitoring the entire process.

With one console for migration and management, an intuitive interface and scheduled migration options, SharePoint Manager Plus empowers administrators to plan effectively, thereby avoiding business disruption and downtime during the migration process.

SharePoint Manager Plus:

- Migrates contents from on-premises SharePoint (versions 2010, 2013 or 2016) to Office 365.
- Granularly migrates SharePoint objects — including sites, site collections, users, groups and site content such as lists and documents libraries — from on-premises servers to Office 365 in a single action.
- Performs migration tasks at convenient times with the migration scheduler.
- Closely monitors migration tasks and quickly identify the reasons for migration failure with on-the-fly status reports.

<https://www.manageengine.com>

OnePlace Solutions Launches add-in for Outlook on Android

OnePlace Solutions has launched a new add-in for Microsoft Outlook on Android that enables Android users to seamlessly connect Outlook to Microsoft SharePoint.

Users have the ability to save emails, attachments and capture email metadata to SharePoint. This extends OnePlace Solutions' existing add-in available for Outlook on iOS, web, Windows and Mac. The Outlook add-in is available globally and can be downloaded from the Office Store or Microsoft AppSource.

James Fox, CEO of OnePlace Solutions commented, "Adding Android support complements the OnePlaceMail Outlook for iOS launch earlier this year and extends our vision of bringing Microsoft SharePoint to where you work.

"With OnePlaceMail now working across Microsoft Outlook on iOS, Android, Mac, Windows and Outlook on the web, users can have a consistent Outlook experience across all devices."

OnePlaceMail improves collaboration, business productivity and records management.

<https://www.oneplacesolutions.com>

Next-generation PDF format for imaging unveiled

The TWAIN Working Group (TWG) and the PDF Association, both not-for-profit organizations designed to foster universal public standards, have announced the joint publication of PDF/raster 1.0, a subset of the PDF specification suited to the needs of resource-constrained imaging systems.

PDF/raster is a strict subset of the PDF file format. It was designed for storing, transporting and exchanging multi-page raster-image documents, especially scanned documents. PDF/raster provides the portability of PDF while offering the core functionality and support of TIFF.

Bitonal, grayscale and RGB images are supported.

Compression options include JPEG, lossless CCITT Group 4 Fax and uncompressed.

PDF/raster was created via a collaboration between the TWAIN Working Group, which originated the PDF/raster concept, and the PDF Association, which provided PDF technology expertise and perspective as well as means of communicating with the PDF software industry to ensure a diverse range of relevant viewpoints was represented.

PDF/raster is part of the TWAIN Working Group's new TWAIN Direct specification — the first zero-footprint, cloud-based version of its royalty free open standard protocol that allows applications to talk directly to document scanners without the need for vendor specific drivers.

PDF/raster provides image-only file format guidelines that can be implemented across a wide range of scanners. It is designed to be efficient to implement on any scanner, to be easy to parse by applications, and to be 100% compatible with PDF and PDF-consuming applications.

"Working with the experts from the PDF Association helped us to avoid many development problems and ensured the standard's quality," said Jon Harju, CTO of Visioneer and the TWAIN Working Group's Chair and lead on the project.

"We have now developed a new PDF file format that can be easily implemented across a wide range of scanners, and is featured as the preferred file format in our new TWAIN Direct specification.

"Working with the PDF Association on this project was an amazing experience and allowed us to turn out a solid PDF/raster specification for adoption in the imaging market."

"We're very pleased to have worked with the TWAIN Working Group on this project," said Olaf Drümmer, a Managing Director of callas software and the PDF Association's technical lead on development of PDF/raster as well as the organization's former Chairman.

"We think PDF/raster is a critical step in paving the way to adoption of PDF as the native file-format for image acquisition," he said.

Although for imaging purposes PDF/raster imposes many restrictions on PDF content and layout, implementers gain from the following benefits:

- files can be read and written without a full PDF parser or generator
- files can be created efficiently from raster images
- files can be generated using a fixed-size raster data buffer
- less than 1KB is required per page in order to generate a multi-page file
- images can be located and read efficiently with comparatively simple code
- PDF/raster files can be quickly and easily identified as such by software

- PDF/raster supports effective and readily available compression algorithms

PDF/raster has important advantages over the full PDF format for storing scanned documents:

- the exact original raster image data can be recovered
- a complex rendering engine is not required
- it provides a precise, well-defined target, simplifying engineering design and testing

PDF/raster retains optional PDF security and authentication features useful for protecting content in a variety of implementations:

- encryption is allowed, useful for access-control purposes
- digital signatures are allowed, useful for authenticating content and for applications that require verification of the document origin, authenticity, date or time of creation, and so on

PDF/raster has important advantages over TIFF and JPEG for storing scanned documents:

- Compared to TIFF, it has far fewer and simpler variants.
- Compared to TIFF, compression is simpler and better standardized and supported.
- Compared to TIFF, PDF files can be natively viewed and printed on more platforms.
- Unlike JPEG, it is natively multi-page and handles bitonal images

An open industry standard, PDF/raster is available royalty-free, and may be freely download from both the PDF Association (pdfa.org) and the TWAIN Working Group (pdfaster.org).

iManage Records Manager 10.0

iManage Records Manager 10.0, the newest version of the Information Governance and Records Management solution, offers a new integration with iManage Work 10 and a complete redesign of its user interface.

Administrators can set governance policies, including trigger events, retention periods and disposition rules, as well monitor and enforce compliance on both records and non-records without introducing burden or overhead for today's busy professional user.

Additional features of iManage Records Manager 10.0 include:

- Seamless Integration with iManage Work 10: Control risk by managing all iManage Work content in place. Nothing is taken out of iManage Work and stored somewhere else. This helps to reduce storage costs and increase user adoption because professionals know there is only one place to go to find the information they are searching.

- Single Access for Electronic and Physical Records: Lawyers can work with both electronic and physical content through an intuitive browser based interface.

- Manage-in-place capability: Administrators can apply and action disposition policy onto electronic and physical client matter material consistently, regardless of location. Content no longer needs to be moved into the document management system in order to manage its disposition.

"iManage Records Manager 10.0 is a game changer for users that interact with electronic records and physical content," said Ian Raine, Director of Product Management, iManage.

"With this new release, users have a single solution to manage and interact with both types of content through a modern user interface.

"All these capabilities from a single vendor makes iManage Records Manager your only choice for managing content throughout its entire life-cycle."

Kapish unveils PDF Wizard 2.0

Australian solutions provider and software developer Kapish has launched Kapish PDF Wizard Version 2.0 which is now available for download from the Kapish website.

Version 2.0 provides HPE CM/RM users with the ability to add watermarks to PDF documents. Watermarks can be applied as either a Revision, Rendition or to the PDF before emailing.

Organisations can create Watermark Templates for the users to select from the dropdown menu or they have the option to input custom text to create the watermark specific to the current PDF. This provides consistency as well as the option for customisation when required.

The Saving Formats have been enhanced for Kapish PDF Wizard 2.0. There is now the option to save PDF's in a PDF/A format. This ensures compliance with archiving standards and allows organisations to simplify the archiving process from the point of creation.

Another time-saving feature developed for version 2.0, is the ability to finalise a PDF upon its creation. Organisations can choose this to be applied across the board or leave it for the individual to decide on a per document basis. This feature increases the ability to customise the product to suit internal processes. Further enhancements have been made to the Kapish PDF Wizard 2.0 menu items to allow certain functionality to be disabled by Administrators if required. This allows organisations to further customise the Kapish PDF Wizard 2.0 to suit business needs.

Work was undertaken to ensure Version 2.0 is compatible with the latest version of Content Manager 9.1.

If you would like to find out more, see the official Kapish PDF Wizard 2.0 Release Notes , or contact the Kapish team to arrange a demo or evaluation.

[http://kapish.com.au/doc-library/release-notes/Kapish PDF Wizard 2.0 - Release Notes.pdf](http://kapish.com.au/doc-library/release-notes/Kapish%20PDF%20Wizard%20-%20Release%20Notes.pdf)

Search and Redact added to pdfDocs

The release of Docscorp's pdfDocs 4.5 U2 has introduced a new way to find and remove confidential information from documents: Pattern Search. Now, instead of poring over documents with a fine-tooth comb, all kinds of potentially sensitive information can be redacted in just a few clicks.

Pattern search is offered in both redaction and regular document search workflows. You can use it to find a single word, phrase or pattern. Choose from a range of common patterns including phone numbers, credit card numbers and/or Tax File Numbers, email addresses, and dates.

Pattern Search options are region-specific, so US users will search for Social Security Numbers while those in the UK will see National Insurance Numbers in the drop-down menu.

Even though some patterns will depend on the user's regional settings, it won't restrict them to only searching for that exact pattern. This means that even if a user in London has their Pattern Search set to NI, a search will look for Tax File Numbers, Social Security Numbers, and any other regional equivalents they select.

Administrators can create default settings for local machines and push them out to all the users on the network. This set-and-forget method means users won't have to select which regional patterns are included in search results each time they use Pattern Search.

Once a search has found all instances of the word, phrase, or pattern selected you have the option to redact all instances or to pick and choose. Redaction in pdfDocs is failsafe and any text or patterns that are redacted will not be able to be recovered by the document recipient.

www.docscorp.com/products/pdfdocs-for-pdf-management/

Adobe Sign Enhanced for Salesforce

Adobe has announced enhanced integration of Adobe Sign with Salesforce to automate document processes and signatures.

Adobe Sign can now be embedded directly into an email, linked with Salesforce CPQ, and can be added to Salesforce Community Cloud.

Anyone in an organisation can send documents for signature from within existing Salesforce workflows, and recipients can sign those documents in a few quick clicks from any device no matter where they are.

The new capabilities include:

- Take action without leaving email— Adobe Sign now features a Salesforce Lightning component that enables e-signatures for contracts to be managed directly within Gmail and Microsoft Outlook. It shows up as a panel in the inbox and displays Salesforce agreements associated with contacts in the emails.
- E-signing from within Community Cloud portals —Businesses using Community Cloud portals can add e-signatures, so that anyone on their portals can sign contracts right from these portals, rather than needing to track down separate emails containing the contracts. Signed documents are automatically routed back to the team in Salesforce.
- Adobe Sign Agreement Templates now available for Salesforce CPQ —Create and manage contracts from Salesforce CPQ and seamlessly send these contracts from Adobe Sign within Salesforce. The templates allow sales teams to easily review workflows, policies, and offer additional security options.
- Sales teams can monitor the progress of proposals, quotes, and contracts out for signature, set business rules to ensure that the right information and right documents are used every time, as well as ensure high level authentication.

Data Governance from the top

TopQuadrant, a provider of standards-based data governance solutions has announced the release of TopBraid 5.4, a collection of web-based solutions for Data Governance and Vocabulary Management. TopBraid Enterprise Data Governance (EDG) 5.4 promises to deliver an integrated approach to data governance with customisable workflows, flexible governance operating framework options, enhanced visualisations, and advanced capabilities to create, manage, and view connections between technical and business metadata.

Major enhancements to TopBraid EDG, include:

Customisable Workflows - Users can now create and use custom workflows for various data governance and curation processes. Pre-built workflow templates are also provided.

Enhanced Operating Model – TopBraid EDG's data governance operating model options now provide access to business and data subject areas, associated governance roles, organisational structures, issues, policies, metrics, dashboard, and other governance assets.

Advanced Data Profiling - Data source profiling is implemented when its metadata is imported into TopBraid EDG. This enables automated reasoning about data and connections of technical metadata to business metadata.

Interactive Visualizations – Updated versions of TopBraid EDG's unique LineageGram and NeighborGram features with intuitive capabilities for flexible viewing and drilling down on focused areas of governance knowledge graphs.

Improved and Extended Access to More Data Sources – Additional capabilities for importing data lineage information and easier mapping of relationships with auto- suggestions.

A new connector is now available for integrating any CMS that supports Content Management Interoperability Services (CMIS). These include Alfresco, Documentum, and SharePoint.

Critical Efficiency Improvements in Document Management

When it comes to document management, productivity and accuracy are critical and require enterprise-class technology to ensure efficiency and traceability. EXL, a global operations management and analytics company based in New York, was able to improve efficiency by several hours per day and reduce resource requirements significantly using OPEX FalconRED and Falcon document scanners for a high-volume customer.

As part of its service offerings, EXL provides mailroom and document services to companies primarily in the finance, accounting, and insurance markets.

The company operates customer mail centres both on-site and in its own facilities where document imaging and document management are key activities.

"Our imaging centre really feeds the process for the folks doing the work at these companies," says Glen Baker, Vice President of Life and Annuities at EXL. "Images are our lifeblood."

At one particular customer site, however, the quality and reliability of those images were in question. The company operated a mailroom for the customer where staff received, prepped, and scanned documents on a conventional production class scanner.

The facility processes between 6,000 and 6,500 documents per day, with each document containing 3.5 to 4 pages.

"The preparation process caused some problems in terms of quality and productivity," Baker says.

"We went back and revisited that entire environment with an eye toward swapping out the software and hardware."

Working closely with the client, EXL created a scorecard and wrote a detailed requirements document that was used to evaluate the new scanning hardware.

"We wanted something that was production-quality and could help take us from receipt through archiving," Baker says.

Eventually, EXL narrowed their choices down to the OPEX Falcon and FalconRED series of document scanning workstations and another scanner manufacturer. OPEX ultimately won out, in part because of the way the scanners handled the archiving process.

"We would have the ability to tag information when it comes through and follow those documents throughout the entire process for traceability," Baker says.

"It also required less customisation out of the box."

The second important feature of the Falcon series was OPEX's one-touch prep and scan environment.

EXL also replaced the existing software implementation with Hyland Software's OnBase product.

Multiple Business Lines

EXL has deployed five FalconRED scanners and one Falcon scanner at the site. FalconRED combines the Falcon scanner with the OPEX Model 72 Rapid Extraction desk. This unrivaled combination of envelope opening, content extraction, and document imaging makes FalconRED the most efficient, secure, and cost-effective way to scan directly from sealed envelopes with no added prep operators needed.

Because the customer had multiple lines of business operating out of the same mailroom, EXL was able to install the new solution in phases. Initially, they brought in a demo Falcon unit for evaluation.

"After that, we took the big leap," Baker says. "We were

convinced this was the answer we would need going forward. We went through the process of getting the software up and running while the machines were being built and had a parallel document processing operation in place [using both new and old equipment] as we went through each phase."

How It Works

As mail arrives, EXL staff sort the incoming documents by line of business. "We have five scanners that manage regular mail and one scanner that handles all accounts payable mail, which has a different spec of envelope," Baker says. "Each of these scanners is aligned to a certain product line. Where there is lower volume for a particular line of business, one scanner is handling multiple product lines."

The mail-handling process was revamped to accommodate the functionality of the new scanners.

"The feeder system was different," says Arun Kumar, senior assistant vice president of operations and account management at EXL. "We eliminated receiving and prepping steps altogether. We also got much more robust reporting with OPEX and OnBase. We are now able to measure productivity and throughput for our resources, and we can detect any piece of mail in the system at any point in time."

Envelopes are stacked on a feeder system on the scanner and then processed. The mail opening, scanning, sorting, and post-scanning processes are handled on the FalconRED and Falcon scanners.

Each document also receives a box number, which is used to tag the electronic document for archiving and traceability.

"When the processing is done, and the document is digitised and indexed, we can identify the box number and assign a location using Hyland's archival module to retrieve any document in the future," Baker says.

In addition to the usual flow of new documents, EXL is also using the OPEX scanners to manage an additional 2,000 to 2,500 documents per day as part of a project to digitise archival documents that are stored in a warehouse.

Kumar describes the change-management process as challenging because the staff was moving from a traditional scanning model to a more state-of-the-art system.

"There was a lot of un-learning that was required from the operator perspective," Kumar says. "But the equipment is so mechanised that our learning curve on it was much lower compared to what we had before."

Using the FalconRED and Falcon scanners helped EXL eliminate manual prep work and other steps in the mail-handling process that had caused productivity issues during the initial deployment of the old hardware. That led to a significant labour reduction.

"On average per scanner, we reduced headcount by 2 to 2.5 people from our production staff," Baker says. "After two months, we were able to reduce our total headcount by close to 14 people."

With their new OPEX scanners, EXL is able to complete a day's work in as much as two to three hours earlier than with their old scanning hardware, and with fewer resources.

EXL has been so satisfied with the performance of the OPEX equipment that they are committed to making the Falcon scanners the primary equipment used in all future contracts.

"Whatever proposals we have out for prospective clients, OPEX is the standard solution, and we are looking at adding even more features in the future," Kumar says.

"We are also able to demonstrate how the system works because we have this operation at our customer site," Baker says. "We can show people the benefits of our solution in a live deployment"

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