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FEBRUARY-MARCH 2018

AI and blockchain

How are they disrupting enterprise information management?



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Why Records Management and Ediscovery Are Adopting Content Federations

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WebApp



EzeScan's Digital Mailroom Assistant lets your team...

- ☒ get mail faster
- ☒ initiate business processes faster
- ☒ effortlessly capture and register mail directly into your EDRMS



EzeScan boosts UK footprint

Outback Imaging UK Ltd, a provider of document capture and scanning solutions under the brand EzeScan, has appointed Ascertus Limited as a reseller covering the UK and the wider EMEA territory. Ascertus is a reseller and professional services provider of document and information lifecycle management solutions to law firms and corporate legal departments.

Bob Gristock, Channel Sales and Key Accounts at EzeScan, elaborated, "Our company vision is to be the leader in document capture and recognition solutions worldwide. To this end, we work with a number of leading global providers of document and content management solutions providers, including iManage. Simultaneously, we partner with organisations in the channel who are frontrunners in their field.

"With Ascertus successfully delivering and managing some of the largest iManage Work installations at customer sites in the UK, it makes business sense for us to partner with them in this market. Also, Ascertus is a great organisational fit in terms of our company ethos and approach to service delivery."

EzeScan provides advanced capture software for document management solutions globally. The EzeScan capture solutions offer time effective ways to batch process documents, forms, invoices and emails to address even the most advanced paper scanning requirements.

"We take a problem-solving approach to the projects we deliver and so our focus is always on the 'solution', not the products," Roy Russell, CEO of Ascertus Limited said, explaining the company's reason for entering into this partnership.

"Therefore, we are constantly looking for new complementary technologies across the document management lifecycle and EzeScan fills the gap in our portfolio for document capture and scanning. It is a proven cost-effective solution and we are already working on projects together. We look forward to a long and mutually beneficial partnership."

Ascrtus partners with a number of software vendors who provide complementary solutions across the email and document management process lifecycle – including for document automation, task management, optical character recognition, PDF generation, document comparison, template management, digital signature – as well as for e-billing and legal spend management.

<http://www.ascrtus.com/>

KNOSYS wins \$A6M deal with Singtel & Optus

Knosys has entered into an \$A6.1 million multi-year contract with Singapore Telecommunications Limited ("Singtel") and its Australian subsidiary Optus for the deployment of the Knosys knowledge management platform, KnowledgeIQ.

The agreement follows a competitive tender process commenced by Singtel in June 2017 with the contract term to span 5 years and 3 years respectively for Singtel and Optus. Knosys will commence project activities immediately with a "Go-Live" date for both Singtel and Optus scheduled for the first half of 2018.

This win represents the largest ever single contract for Knosys, expanding its footprint into the Telecommunications sector and firmly within Singapore.

John Thompson, CEO of Knosys, said: "Knosys was able to achieve this win against immense local and international competition in Singapore. This will be a significant reference site for the Company in the critical Singapore and wider South East Asian market and Knosys will look to continue to expand its information and knowledge management business there."

"This contract illustrates the value we can add to many customers and the superiority of our market leading KnowledgeIQ technology. We can enable our customers to drive extra revenue, save them time and expense, and allow them to make more informed decisions."

"We are on target to achieve our double-digit user growth target for FY18 which I know our investors have been patiently waiting for. This is a fantastic step in our ambition to build Knosys into a premier software vendor of cognitive information, knowledge and analytic solutions globally."

The Knosys KnowledgeIQ platform is an enterprise-grade, knowledge management solution that enables companies through a machine learning approach to discover and deliver personalised information to staff and customers to transform productivity and engagement. KnowledgeIQ is curated information using Artificial Intelligence ("AI").

www.knosys.it

Grace Australia heads north

INFORMATION management company Grace Australia has continued its focus on regional expansion, striking a deal to acquire Toowoomba-based record management company INFOstor. The Courier-Mail reports Grace made four acquisitions in 2017 three of which were in regional cities, as well as AMS-Imaging in Melbourne.

Grace information management director Michael Hyland said the 107-year-old company, which specialises in information management, storage and removals, was growing rapidly and now employed about 850 people around the country.

"We're able to bring solutions in information management to the market in the regional areas which are often left unattended or unserved," he said.

"We also endeavour to use the local community and get regional support.

"We employ local regional people, and use their facilities wherever we can ... that's a big thing for us."

INFOstor was the records management side of Toowoomba business Taylor's Removals.

Mr Hyland said the acquisition would allow for scalability and efficiency improvements to deliver broader services in the area, and added the company had further expansion plans to consider in 2018.

"As a business we are continuing to research, and bring in new ideas and concepts," he said.



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NAA launches Digital Authorisations Framework for government agencies

The National Archives of Australia has launched a new Digital Authorisations Framework designed to assist Australian Government agencies transform analogue approval processes to fully digital approvals.

By releasing the framework, the Archives aims to help streamline approval times, support better business and more complete and accountable Government information. This is all part of the Archives work to implement the requirements of its Digital Continuity 2020 Policy, which is improving the way Government manages its information assets.

The Framework provides a series of steps that can be used to help Australian Government agencies determine an appropriate digital approval method for an individual business process, or a series of related processes. By completing an assessment, users will have a better understanding of the sorts of requirements they need to have in place to appropriately select and use a digital approval.

It is designed to acknowledge that agencies are at varying stages in implementing digital processes and approvals. Some have got there while others have manual processes in place for everything, including low risk, and/or high volume, administrative tasks. A lot of organisations fall somewhere in between.

"Fully-digital processes make good business sense, as well as supporting information re-use," said an NAA spokesperson.

"We need to adapt and change our processes to deliver the digital Government people want and expect. We should absolutely avoid printing and signing something wherever possible"

The Framework provides options for using a range of different

digital approval methods, including email, action tracking and system workflows. The advantage being this approach allows Government to better use the tools it already has.

In addition, the Archives envisions other approval methods and controls may be used for higher risk processes, as required by legislation or where available in a particular agency.

The Framework helps users identify where an additional third-party solution may need to be brought in, allowing for informed decision making based on a business risk assessment. This approach caters for agencies on either end of the digital maturity scale, while supporting a more strategic and targeted use of often limited Government resources.

The Archives recommends the first step in developing digital approvals is to undertake a business process risk assessment. The Framework provides a series of short questions that can be used to determine the level of risk associated with adding a digital approval to a specific business process, in relation to matters such as expenditure thresholds and the required approval level. The second part includes a series of modules to help identify and resolve potential risks associated with implementing a digital-approval, such as potential issues relating to stakeholder identification and agreement, and security and access.

So for instance, where the Framework identifies the need to ensure that all parties agree to complete an approval digitally, the mitigation activity is provided; that there are appropriate controls in place, including how the resulting approval and associate information will be managed.

The final part of the framework puts all this together, recommending a suitable digital approval solution based on a user's responses, including practical recommendations for implementation. The Digital Authorisations Framework can be accessed on the NAA's website, which also includes more detail about how it can be used.

Watson-Powered AI Product for Data Privacy Law unveiled

Thomson Reuters is introducing a new data privacy research solution that draws together privacy guidance from Practical Law editors, curated news, and a question-answering feature using IBM Watson. Data Privacy Advisor was created to support privacy professionals at multinational businesses and law firms. It offers a deeper understanding of the law and privacy obligations across multiple jurisdictions.

A button labelled "Ask Watson a Question" allows questions to be asked using plain English. TR and IBM spent nearly two years training the system, using more than 60,000 question-answer pairs created by subject-matter experts, according to Khalid Al-Kofahi, TR's vice president of research development and head of its Center for Cognitive Computing.

The ask-a-question feature is currently trained to work only with certain jurisdictions, but TR will be adding more jurisdictions as the product is further developed. The jurisdictions currently included are: Australia, Canada, EU, Hong Kong, India, Ireland, Malaysia, New Zealand, United Kingdom and United States.

Data Privacy Advisor provides:

- Global statutory and regulatory materials – including pending legislation and regulations, data privacy country guides for 80+ countries, the full GDPR library, and Practical Law know-how content directed to global legal and program management issues
- Question answering via IBM Watson-enabled technology that allows users to ask relevant questions in their own words and receive a full-sentence answer

- Curated news, analysis and blog content specific to data privacy

- Related Concepts – a feature designed to help users discover additional insights that otherwise might go unnoticed, also enabled by Watson.

"Innovation has been our lifeblood for more than 100 years," said Susan Taylor Martin, president of the Thomson Reuters Legal business. "Data Privacy Advisor is a great example of how we've brought together our global content, domain expertise and distinctive technology to meet the needs of legal and compliance professionals."

Industry experts taught Watson to understand the nuance of legalese – be it simple definitions, such as "parties" or "organisations," or more specific concepts that data privacy professionals manage regularly.

During the training process, the team solicited feedback from privacy professionals who, along with Thomson Reuters and IBM Watson experts, graded more than 60,000 responses from Watson, helping the system learn and provide increasingly refined responses.

"Adding the AI capability from Watson to our own in-house AI expertise made a true collaboration between our teams to help Watson understand the law and the context of the questions – not just memorize the questions and answers – so the platform truly helps data privacy professionals find the answers they need," Al-Kofahi added.

For more information, visit: legalsolutions.com/data-privacy-advisor

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14,622
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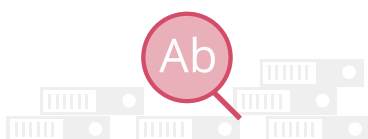
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Mobile Capture

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



Document Archiving

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



Accounts Payable Automation

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



Mailroom Automation

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



Document Classification

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



Forms Processing

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

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

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

- Optimisation of data quality
- Reduce Operational Costs

Finance says Digital 2020 still on track

Australia's Department of Finance has denied its Digital Records Investment Moratorium for non-corporate Commonwealth agencies will impact the government's Digital Continuity 2020 Policy, despite its own timetable admitting a proposed Whole-of-Government platform will not provide full record-keeping capability for another 6 years.

Finance has put EDRMS adoption by non-corporate Commonwealth agencies on hold until 30 June 2019 while it completes a pilot rollout of a new "innovative" records management solution. The decision has upset the vendor community and those agencies who wish to embark on an EDRMS rollout must now seek a specific exemption from the Australian Minister for Finance, Mathias Cormann.

For some years, Finance has been quietly building towards its solution known internally as the Whole of Government Records Management as a Service (WoG RMaaS) project. It was allocated \$A9.1M in the 2016-17 Budget to further development, and says this will be sufficient to test the concept of automated record keeping with a small number of agencies

According to a spokesperson, "Finance is taking a research approach to testing and proving the use of innovative technology for records management. As part of Finance's research, we are testing how machine learning capabilities can be used to modernise records management across the APS.

After rejecting industry submissions as insufficiently innovative, Finance announced in January it intends to go it alone with a solution that rejects the traditional EDRMS model. It wants a platform that applies artificial intelligence (AI) or ontology management to provide auto-classification capabilities.

"[Our] findings are consistent with those of Mariano and Woodbridge (2017) of Gartner, who surveyed 14 of the most popular content services and records management vendors, identifying whether and how they are expanding their capabilities through automation and use of evolving and disruptive technologies such as AI technologies. The Gartner survey found that most vendors' automation capabilities are through rule-based classification and not AI technologies. The Gartner survey also stated that a high number of the vendors are investing in AI technologies for records management, which indicates that while vendors are moving toward use of AI, they are not yet at production stage with their capabilities."

The Department says it has already been approached by a number of parties interested in the Australian Government Records Interoperability Framework and how this product could work with future solutions. It wouldn't reveal their identities, claiming "the information is commercially sensitive and it is not appropriate to release it."

In a document outlining the proposed platform to be developed after the pilot phase running until June 2019, Finance states, the solution will be "capable of processing all records in its first year from pilot agencies, scaling to all government records in unstructured systems in Year five."

According to the Digital Continuity 2020 policy, all agencies have a 2020 deadline for recording business interactions, decisions and authorisations digitally.

Asked how they could manage this if the whole of government records management platform will not be capable of processing records in some unstructured systems until 2025, Finance responded: "Managing information digitally is not dependent on implementation of a records management solution."

Finance also denies the moratorium prevents agencies being able to upgrade their existing solutions, even though upgrades will only be permitted "on the basis that a critical business failure

is likely to occur without new investment or upgrade."

"No exemptions have been sought under the moratorium," it states.

In September 2017, Finance hosted a series of Market Days to investigate the records management industry's capabilities to provide the whole of government platform based on a Position Paper released in August 2017 via AusTender. Submissions were received from 28 competing vendors and solution providers.

Rina Bruinsma, First Assistant Secretary Efficiency and Assurance Division Department of Finance, wrote a letter on January 18, 2018 to inform all who took part in the Market Days that their submissions had been reviewed by The Department of Finance (Finance) and panel members from partner agencies.

"... the panel determined that no single potential supplier possessed an existing off-the-shelf (OTS) offering that could address all of the elements at the maturity capabilities required by the proposed approach. However, a large number of interested parties were able to demonstrate partial maturity against most of the elements."

"After careful consideration of the Market Day findings, Finance and its Program governance committee, have decided to proceed with demonstrating the requirements for the intended solution. This work is intended to test whether the automation of recordkeeping, as envisaged in the Position Paper, is possible,"

Lisa Read White, a director of Records and Information Management Professionals Australasia (RIMPA), queries "If several vendors demonstrated "partial maturity" towards the elements why wouldn't Finance work with the vendor reps to develop those elements further and speed up the maturity?"

"What benefit is there to a Govt agency charged with servicing the Country and its citizens embarking on a software development exercise, which is my understanding of "demonstrating the requirements of the intended solution". Surely software development is not a Finance function?"

Finance claims it will not be developing the solution and "Any solution will be provided to Government by the market."

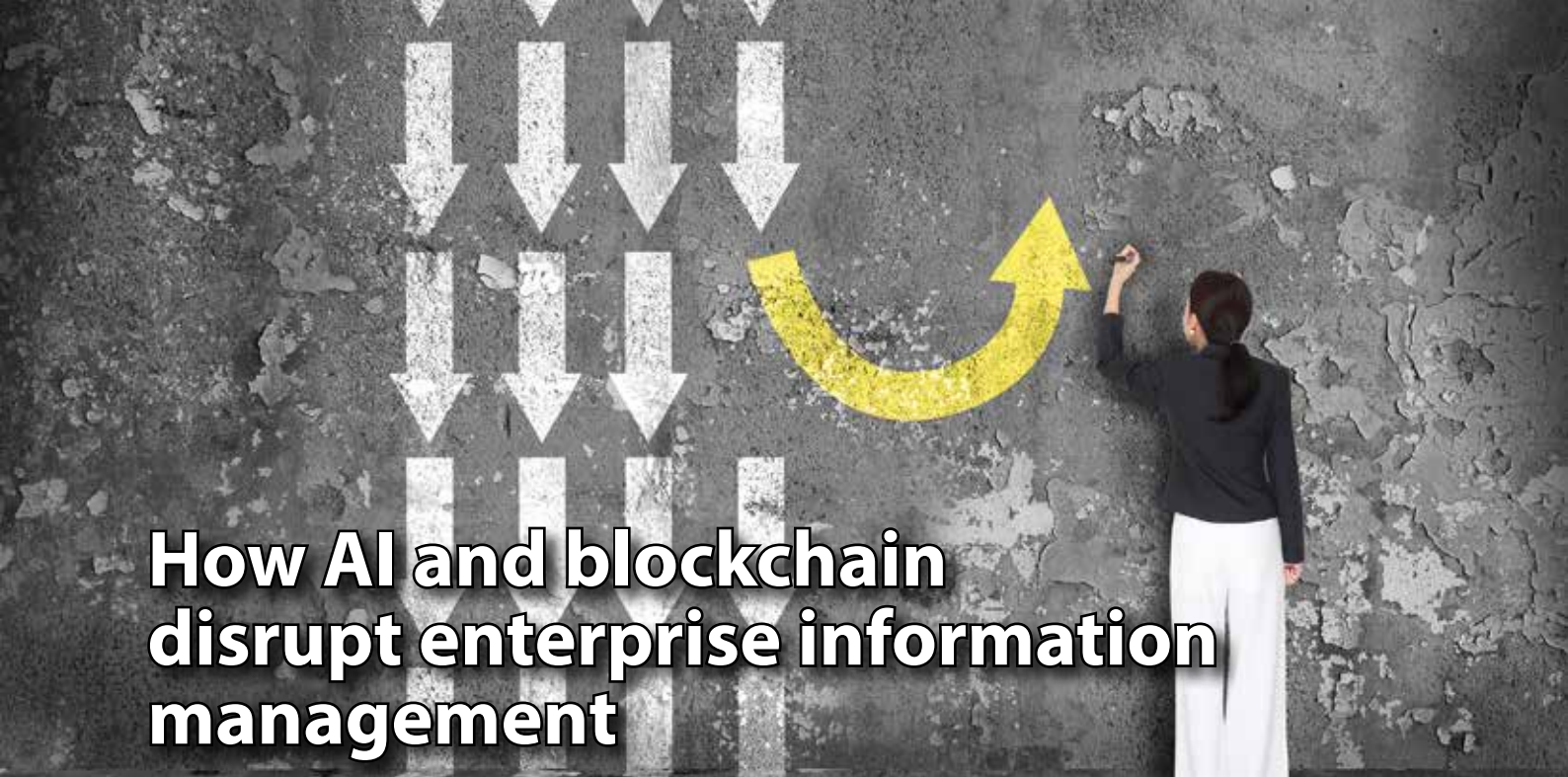
Frank McKenna, founder and CEO of Australian ECM vendor Knowledgeone Corporation, said, "We all know that the Australian government does not have a good record with major projects, particularly complex software projects.

"This time we are asked to believe that the bureaucrats (and numerous contractors) in Finance have magically ingested all of the expertise accumulated by the numerous content management vendors over 30 years or so and now know better how to build a state of the art content management system.

"Sounds to me like some clever consultant or bureaucrat out to make a reputation has sold top management in Finance on something that top management don't understand. I believe it happens a lot in government. The Minister of course will be an expert at least until he is reassigned and passes it on to another minister and then another minister as the government changes.

"Let me make some brave predictions:

- It won't be ready on time.
 - It will cost many times the initial budget cost.
 - They won't be able to convert and ingest data from the operating legacy systems.
 - After delay after delay many agencies will force Finance to give them exemptions.
 - End users will suffer for years from bugs and a poor user interface.
 - By the time it is finished it will be using out-of-date technology.
- "Check with me again during 2020," said McKenna.



How AI and blockchain disrupt enterprise information management

By Johan Raedemaeker

By now, the importance of smart content, proper information management, its main challenges and opportunities to optimise EIM are already well-known. New technologies, however, can have disruptive impacts on the ECM and EIM markets by replacing existing technologies and/or creating new and valuable capabilities.

Well-applied AI, machine learning approaches and cognitive computing can boost almost any information management process. Imagine, for example, how machine learning could revolutionise the efficiency, intelligence and speed of digital capturing processes like scanning, automation and (auto-) classification.

Imagine also the growing capabilities of cognitive computing applied to all kinds of data – not only structured data, but large-scale content repositories as well. Companies are spending vast sums to digitise paper archives, reorganise large file sharing, and set up collaboration solutions and document management platforms. The main driver behind this is the old adage ‘information is the new gold’.

So far, however, the focus has been on operational excellence, shrinking stacks of paper and saving physical storage. With cognitive computing, we will be able to ‘activate’ content to reveal new insights. It goes without saying that cognitive computing, in combination with a solid information management platform, can help organisations to overcome the challenges posed by GDPR.

Many vendors offer cognitive platforms as-a-service: IBM Watson, MS Azure Cognitive services, and OpenText Maghela. These firms are all making huge strides in offering such capabilities in economically interesting ways.

Blockchain

Blockchain-based innovations are being developed at a speed that has never been seen before. Once confined to the finance industry, the number of blockchain applications in almost every industry is exploding.

Governments are catching up as well. The government of the UAE, for example, wants to go fully blockchain by 2020. In Estonia, the platform is used to manage citizens’ medical files. Financial institutions use the platform to create more digital transparency and compliance. This will disrupt the entire audit industry, possibly rendering many of its functions obsolete.

Other industries have adopted this technology in a logistical context. The traceability of contested goods, like diamonds, and

the supply chains of fair-trade products spring to mind. While the vast majority of companies weren’t exposed to the concept of blockchain until very recently, 80% have already started exploring and experimenting with it.

Will blockchain replace ECM and EIM systems? Not immediately. Remember that blockchain is a distributed ledger that replicates transactions across the entire user platform. Although there are already companies offering blockchain-based databases as a storage alternative, most information will remain under direct control of the companies themselves.

The application of Infonomics revealed that the value of a company increases with the amount of valuable and unique information it owns, and how well it’s managed.

Impacts on successful ECM/EIM

AI and cognitive computing can increase the value of the information that has been captured over the years. Exploiting big data and big content repositories will only be possible using machine-driven learning and cognitive processes.

These innovations will activate information, make employees more efficient and knowledgeable, and transform companies into truly smart enterprises. This will further fortify any business case about investing in ECM & EIM platforms.

Even though blockchain will not replace ECM platforms, a successful ECM vendor will use the technology’s current momentum to develop a platform that offers flexible content services.

Services that facilitate interaction with blockchain platforms will be the key to success. Such services will enable transparent information flows between organisations, individuals and governments, replacing most extranet variations and other information exchange platforms (IEPs). As soon as governments embrace blockchain in their legislation, this will be a game-changer for vendors providing content services to the blockchain platform.

AI and blockchain are only two examples of disruptive technologies. One thing is for sure: the first organisation to transform into a smart and intelligent enterprise will have a major leg up over its competitors.

Johan Raedemaeker is an Experienced consultant and EIM Solution Architect at Delaware.pro. This article was originally published at <https://www.delaware.pro/en-BE/Discover/Blog/how-ai-and-blockchain-disrupt-enterprise-information-management>, which includes links to further resources on this topic.

Don't learn the wrong lesson from the Cabinet Files breach

By Stephen Bounds

The Cabinet Files security breach uncovered by the ABC seems like an episode of that crazy cable TV show *Storage Wars*, where bargain hunters bid for unclaimed storage lockers in the hope of uncovering hidden treasure.

That a person could pop into a Canberra second hand shop and walk away with a treasure trove of Cabinet-in-Confidence documents must be a wake-up call for every senior executive in the Public Service: it is time to take record-keeping more seriously. All government agencies must ensure they are assessing the value and risk of their information holdings in an active, ongoing way.

After the cavalier disposal of a locked filing cabinet filled with sensitive documents, the ABC can quite rightly point to "a seemingly casual attitude of some of those charged with keeping the documents safe".

Unfortunately, people may be learning the wrong lessons from the past few days. Interviewed on ABC's 7:30 program, Terry Moran suggested that a switch to digital from paper records should be expedited. Opposition Leader Bill Shorten also suggested that spies should just be "shopping in second-hand furniture stores" for sensitive paper files.

Despite the media circus, inadvertent exposure of digital records remains a significant risk. Indeed, electronic breaches can be far more damaging because of the potential to disclose massive amounts of information.

Recent examples include:

- USB memory sticks and CDs with sensitive Defence information left in airport lounges
- The accidental publication of the personal details of 550,000 donors on the Australian Red Cross website
- 500,000 customer records being extracted and sold by an employee of the Bupa health care giant
- Medicare cards being extracted via medical providers and sold using the same 'dark web' channels used to resell stolen credit cards
- 3 billion Yahoo! users having their details stolen after a security breach in 2013

I would caution investigators against a witch-hunt to ascertain the identity of the heinous filing cabinet seller. Events like this are a systemic failure, and the solution needs to be systemic as well.

Most record-keeping efforts struggle without deliberate, ongoing reinforcement because of the psychological distance that exists between record-keeping actions and effects. In short: the consequences of bad record-keeping happen later, to someone that isn't you, somewhere else, and you don't think anything will ever happen anyway.

There are many tools and techniques you can employ to reduce psychological distance. For example, the use of meaningful reports and key performance indicators can make a distant obligation more relevant.

An even more enduring effect comes from running periodic simulations of record-keeping emergencies. These emergencies test

organisational responses and mentally reinforce the importance of sound custodianship among business users.

However, the most fundamental aspect of managing records effectively is for staff to understand the value and risk of their organisation's information holdings. Many government organisations apply the same level of record-keeping care to a routine memo setting up a meeting as they do to a highly sensitive submission to the Departmental Secretary.

Undertaking a value and risk assessment of information holdings by documenting the relative costs and benefits of success and failure, per business process, can be a critical aid for leaders when prioritising information handling improvements.

Finally, as the custodian of Australia's national interests and champion of better governance outcomes, the public service should take a leaf out of the healthcare sector and consider implementing sentinel events for records.

In healthcare, "sentinel events" are a range of unacceptable systems outcomes. The goal is for sentinel events to never occur, but if they do, it triggers a centralised reporting process and root cause analysis to aid in future prevention.

In a record-keeping context, this would cover things such as the inadvertent release of Cabinet and National Security documents, and major leaks of personal information about Australian citizens. Mandating reporting and action in response to record-keeping sentinel events would provide accountability and a commitment to improvement that could sustainably fix massive systemic failures like the Cabinet files breach.

Stephen Bounds is the Executive – Information Management at Cordelta, a Canberra-based professional services company. stephen.bounds@cordelta.com



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Lack of budget and knowledge hindering the public sector

Limited working budgets and organisational culture are the biggest barriers to achieving digital transformation within the public sector particularly focused on Local Government in ANZ, reveals the 'The Changing Landscape for the Public Sector: The Challenges of Building Digital Bridges', a study of local government leaders in Australia and New Zealand.

The report was conducted by the University of Technology Sydney (UTS) and commissioned by Civica, developer of the Authority enterprise application suite for Local Government.

Approximately 70 percent of survey respondents claim that limited working budgets act as a major constraint to digital transformative change, while 65 percent believe organisational culture is an impediment. Speed of technological changes (37 percent), difficulty in matching user expectations (32 percent) and conservative leadership (25 percent) were also listed as barriers.

The figures are part of the fourth edition of Civica's Changing Landscape research series, developed in collaboration with Institute for Public Policy & Governance (UTS:IPPG) at the University of Technology Sydney. This year's report examines the role of leadership in building digital bridges that connect community outcomes and public sector authorities.

According to Professor Roberta Ryan, Director, Institute for Public Policy & Governance (UTS:IPPG) & UTS Centre for Local Government (UTS:CLG), local governments in particular continue to struggle with limited funding, implementation and resourcing issues for digital projects.

"Many local councils have to make a trade-off. Digital services are being pushed down the list of priorities in favour of more immediate requirements to build or maintain physical infrastructure that serves to keep communities moving.

Meanwhile, the absence of leadership understanding in driving an outcome-based strategy is also hindering successful implementation of digital initiatives," said Ryan.

Local governments are strongly in favour of partnering with other organisations to achieve strategic transformation goals. Nearly 60 percent of respondents felt that partnering with similar organisations was a substantial opportunity for them, and closely followed by partnering with external consultancies (54 percent) and private organisations (49 percent). Partnerships with state and federal government were some way behind at 34 percent and 16 percent respectively.

"What we are seeing in our work with public sector organisations is that they want to embrace digital solutions. Many

organisations operate different system environments. Even though amalgamations offered access to bigger budgets, this also meant that larger amounts of data and systems need to be merged. We see huge potential for the public sector to work with each other and third parties like ourselves to achieve strategic goals – and they appear willing to do this voluntarily – but what maybe they are saying is support us, don't force us" said Richard Fiddis, Managing Director at Civica International.

While 84 percent of the survey respondents view digital transformation as an opportunity, almost one in five felt they were still not given many chances to learn new skills relevant to a digital-first environment.

In addition, nearly 80 percent of respondents admitted failure to implement some digital projects.

There is also still a significant one in three organisations who believe they only talk about emerging digital technologies. Alarming, a small section revealed that they don't pay attention to emerging technologies.

"For some councils their citizens place a high value on physical services and human engagement. At the same time, some communities can seem ambivalent around the use of new technologies," said Fiddis.

The results demonstrate that organisations with a culture resistant to change or lacking resources and talent struggle with driving transformation projects. Another key reason that can lead to implementation failure is an absence of knowledgeable leadership backed by a sound strategy. Despite the struggles, almost three quarters of the survey respondents state their leadership has a clearly established strategy to become a digitally mature organisation.

According to Fiddis, embracing digital transformation requires the existence of a digital culture and mindset across the organisation, championed by strong leadership that can tackle the challenges of leading in a digital first environment.

"As we see from our work in the UK and our Civica Digital business there, we need leaders to make the tough calls on prioritising investment in digital infrastructure against physical infrastructure, or finding ways to justify and finance both, said Fiddis.

Grant Thornton Australia selects iManage Cloud for 1300 Users

Grant Thornton Australia Limited (GTAL) has selected iManage to support the firm's agile workplace strategy and increase IT agility and user collaboration, all delivered through the iManage Cloud. Grant Thornton Australia is a member firm of Grant Thornton, one of the world's leading organizations of

independent assurance, tax and advisory firms, with access to a network of over 40,000 people across more than 130-member firms worldwide.

Years of growth through mergers and acquisitions has left GTAL with a large number of disparate systems for performing key business processes. With the firm's cloud-first IT strategy, iManage Cloud will allow GTAL to implement a standard document and email management platform across the entire organization delivering an agile, flexible and scalable solution for the business.

"The sheer volume of data our people deal with is enormous – a hundred thousand emails every single day, just for starters," said Andrew Pritchett, Chief Information Officer, GTAL.

"iManage were able to demonstrate how this will work on a single, scalable platform, making it easy for our people to sort, share and search that amount of information, turn it into knowledge and to derive real insights. iManage Cloud gives us the capacity to accommodate those data volumes and the agility to grow rapidly – we can cater for a new business unit or full merger without infrastructure upgrades and delays."

"iManage connects all of our knowledge and integrates easily with our digital platform," said Luke Morey, Program Manager, Office of the Chief Operating Officer, GTAL.

"Its user interface is specifically tailored for professional services and will make the change management frictionless, helping us to drive adoption across the firm."

iManage partner Phoenix Business Solutions was selected by GTAL as their strategic technology implementation partner to facilitate the design and delivery of the solution to approximately 1300 GTAL employees across Australia.

"IT strategy needs to be aligned with business strategy," said Dan Carmel, Chief Marketing Officer, iManage.

"Working with Phoenix to implement iManage Cloud, GTAL isn't just transforming their IT system—they're supporting a business strategy to increase IT agility and create a compelling customer experience. That kind of customer focus is what wins in today's markets."

Pharmacy boost for My Health Record

Every Australian pharmacy will be able to use My Health Record, with the final software provider about to connect to the system, reports industry newspaper *Pharmacy News*.

Corrum point of sale (POS) and script dispensing software, which is used by 1000 pharmacies nationally, will connect to the system in 2018.

Pharmacy uptake has also been boosted by Chemist Warehouse, which says it plans to roll out My Health Record in all of its pharmacies. There are reportedly just over five million Australians with a My Health Record, and nearly 13 million prescriptions and dispensing records have been added to the system.

Pharmaceutical Society of Australia (PSA) president Shane Jackson told *Pharmacy News* "The connection of Chemist Warehouse and Corum to My Health Record will increase the amount of valuable information that health practitioners can access in order to provide clinical and timely care for their patients."

Meanwhile, *Pulse+IT* reports that NSW Health has integrated its HealtheNet clinical portal with the iPharmacy dispensing software used in many NSW hospitals and is now uploading discharge medication information to the My Health Record from selected facilities.

HealtheNet also provides NSW Health clinicians with access to hospital medical imaging results and pathology results, and is the vehicle NSW Health is using to deliver hospital pathology reports to the My Health Record.

City of Darebin tames email with EzeScan Profiler

The City of Darebin, a local government area in the northern suburbs of Melbourne, has implemented a new capture solution from EzeScan which is integrated with its Infor Pathway property management system and Objective ECM.

After working with a previous capture system that did not deliver the required functionality, the local government authority with over 1300 staff made the switch to EzeScan, with its out of the box integrations with both Objective ECM and Infor Pathway a major attraction.

The solution, which processes incoming correspondence into Objective, was put into production in 5 business days.

EzeScan's new Profiler was deployed to standardise all council records and digitisation requirements. This means documents are fully classified by EzeScan and users no longer have to do any post-processing tasks in Objective as EzeScan is doing all the heavy lifting and automatically naming files, applying static metadata, triggering workflows, and sending email notifications.

Unified profile configurations allow EzeScan users to capture both hard copy and digital born information including email.

Records staff have substantially reduced the time to capture and profile information allowing them to work on more important tasks such as upskilling council users on EDRMS.

EzeScan email records capture module has allowed council to batch process the ever-increasing number of email records in batches in the same way they capture hard copy documents, with the added value of processing attachments as individual records if required.

Angelo Luczek, Coordinator, Corporate Information at the City of Darebin, said, "EzeScan have provided outstanding support, responding quickly and providing assistance without turning every request into a project!"

"Most EDRMS products have some sort of Outlook integration that allows end users to save and register their selected corporate email into the EDRMS, in our case Objective. Typically, this process relies on the end user registering the email into the correct location in the EDRMS, naming it to comply with our naming convention, classifying the email and applying any other relevant metadata.

"On average our Council generic email account receives anywhere between 4,000 to 4,500 emails per month, and previously my team would process these emails one at a time using native EDRMS integration which is extremely laborious.

"Now that we have deployed EzeScan my team have the ability to batch process multiple documents in EzeScan (Batch Processing). We can now process large volumes of emails in a fraction of the time, which has now provided us with time back to focus on other record-keeping functions in the office.

Council business units have reported the Objective data they are now receiving from Corporate Information is in the exact format they require and is accurate first time.

The EzeScan Records Capture Module allows emails and their attachments to be batch processed in the same manner scanned or electronic documents.

Records administrators can manage the EzeScan PROFILER themselves also saving time and money on organising for IT/vendor support.

Nearly 80% of companies concerned with digital disruption threat

Nearly 80% of organisations are concerned with disruption and competitive threats, especially from new digital-savvy entrants, a new study by Accenture has found.

Digital disruption, data explosion, and customer experience are the driving forces behind the need for companies to transform how they do business and move toward Intelligent Operations.

Data is rapidly shifting from a "peripheral component to a fundamental driver of operations and competitive advantage", said the report

However, nearly 80% of respondents estimate that 50%-90% of their data is unstructured.

Furthermore, data comes from a wide range of sources, including owned first-party data, second-party cooperatives, and subscribed third-party data, as well as enormous amounts of data embedded in internal processes, the report said.

"Enterprises need a mindset shift to become more data-centric and to maximise and monetise this diverse data," it detailed.

"A robust customer experience strategy is the most significant driver of operational agility. But nearly 50% of enterprises say their back office is not keeping pace with front-office requirements as they evolve toward the OneOffice that replaces siloed front, middle and back office functions with seamless processes and digital capabilities

"The future belongs to organisations with Intelligent Operations: Those that use diverse data driven by applied intelligence and human ingenuity to empower next-generation, real-time decision making, exceptional customer experiences and breakthrough business outcomes.

"With Intelligent Operations at the heart of the enterprise, a company can become more flexible, agile, and responsive; generate value more quickly; and achieve sustainable competitive advantage. Intelligent Operations have five essential ingredients that come together in a dial-up or dial-down as-a-Service approach to lasting business process transformation.

"Intelligent Operations provide the agility, flexibility and responsiveness that businesses need to act swiftly to change and steer a new course with confidence."

The report advises on five essentials for Intelligent Operations:

Innovative Talent -

Entrepreneurial drive, creativity and partnering ability are organisations' top three areas of talent focus. The talent of the future will need to bring creative problem solving to the enterprise in addition to strong digital, operational and domain expertise. To meet these talent demands, enterprises will need a much more agile human resources function and a more flexible approach to recruiting that heavily leverages an open talent marketplace.

Data-driven Backbone - Over 90% of organisations believe that

data-driven decisions will help them generate breakthrough customer insights. Organisations need to capitalise on the explosion of structured and unstructured data from diverse internal and external sources to gain new insights their innovative talent can use to achieve better outcomes. To that end, over 85% of enterprises are developing a data strategy around data aggregation, data lakes, or data curation, as well as mechanisms to turn data into insights and then actions.

Applied Intelligence - Nearly 90% of organisations believe the Triple-A Trifecta of automation, analytics, and artificial intelligence (AI) will become the holy grail of business and process transformation. To effectively use these powerful tools, companies need innovative talent who can understand the business problem they are trying to solve and then augment this talent with the right combination of people, connectivity and technology to find the answer.

Leveraging the Power of the Cloud - Over 90% of enterprises researched expect plug-and-play digital services with enterprise-grade holistic security, which is possible today through the power of cloud infrastructure. Capitalising on the cloud, however, will require significant efforts to replace or modernise legacy systems. Recognising this, 25% of respondents indicated they have completed legacy replacement or modernisation and another 42% have concrete plans to do so.

Smart Partnership Ecosystem - Over 90% of enterprises feel they need to partner closely across the ecosystem to exploit market opportunities. For instance, organisations of the future will develop symbiotic relationships with start-ups, academia, technology providers and platform players to achieve their goals. Similarly, traditional business service providers are increasingly collaborating with enterprises in a true partnership model that maximises co-innovation.





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Objective embraces a digital future at new Sydney HQ

The cubicle walls in today's workplace are coming down, nowhere more obvious than at Objective Corporation's impressive new global HQ, known internally as The Skylab, located in the IT heartland of North Sydney.

Moving to the new premises in 2017 required staff hike only a short distance up the road from their old office, however Objective took the opportunity to design a purpose-built new facility for more than 250 staff, including around 100 software engineers and developers.

Founded by CEO Tony Walls in 1987, Objective Corporation is the creator of the Objective ECM platform. Objective now directly employs 280 people and generates domestic and export sales of \$A63 million a year. It has diversified in recent years from ECM software to cloud-based document generation and collaboration, and now operates across the globe.

"The move to Skylab was designed to lift our ability to foster greater collaboration and to attract gifted employees so we may accelerate the development of innovative new ideas and scale our business globally," said Objective COO Frank Volckmar.

"The office and tools underpin a more flexible, collaborative and high performance approach to working together across all our offices and teams, and we are already seeing benefits in terms of engagement and performance. We are becoming more competitive in the manner we conceive, develop and deliver outcomes for our customers and aim to remain a leading software development company in Australia."

The extent to which paper-based processes have been eliminated from day to day business at The Skylab is demonstrated by the lonely presence of a single MFP serving the entire main office floor.

The new office has been designed around how people work, not where they sit, and provides a variety of flexible spaces designed for activity-based working.

Employees are able to choose which space to use based on the task they are doing that day, from desk-based working to collaborative 'zones' to share ideas. Modern cloud-based platforms such as Objective Connect, Right Now and Salesforce as well as the adoption of Concur for digital invoice processing have enabled the 'paper-less' office.

Today's employees rank mobility as more important than an assigned space or even a corner office. Instead of being chained to their workspace eight hours a day, they want the freedom to choose where they will be working at any given time on any given day.

Like many office buildings today The Skylab includes spaces with varying levels of privacy: collaboration areas, multi-purpose rooms, smaller "huddle rooms" or conference rooms, and semi-private areas for individual use.

There is no phone system in the new building,

with Skype for Business and headsets the new normal, which means staff working from home or on the road able to fully participate as if they were at a workspace on the same floor or via one of a number of flexible meeting spaces equipped with digital whiteboarding.

"All our internal systems, including our ECM or Electronic Records Management system, enable our employees to work anywhere, anytime and across any device," said Volckmar.

"ABW isn't something we just do in the office, the thinking also encompasses people working at customer or home offices and access to records digitally is simply a fundamental requisite. The fact we have redesigned our application interfaces to be highly intuitive, easy and performant from anywhere and any device was a huge step forward.



Perched atop a landmark new North Sydney office tower, Objective's new 'Skylab' HQ has fully embraced the trend towards activity-based working and digital processes.



"One of the things we've got at the top of our list is trying to move beyond being a transactional team, to being an analytical team and I think that's something that's reflected across the board for finance teams. It's not an easy journey, there is a lot of work that is required in trying to ensure that the transactional stuff is done very accurately and efficiently, in order to free time for people to be able to focus on doing analytics and insights which is really what ultimately, as a mature finance team, you want to be providing." – Objective Corporation CFO, Ben Tregoning

"Our systems simply allow our employees to focus more time productively rather than on admin so they may achieve more. We are reviewing all our processes and systems to ensure they deliver similar outcomes for our teams and our changes to expense management reflect that drive."

Like any organisation that has been in business for over 30 years, Objective has faced a challenge to transition legacy systems or operational processes into a digital form. A key driver has been the desire to provide an unobstructed flow of information between content management and line of business systems. Chief Financial Officer Ben Tregoning joined Objective in September 2016, at which time the organisation had already completed the difficult transition from a small business accounting system to the enterprise-level NetSuite providing cloud-based ERP and Financials.

"At the moment at Objective, like many other businesses that have grown quickly, we have some disparate systems which we tie together through Excel.

"We actually didn't make a conscious effort to reduce paper, it's just that wherever the processes are slowest tends to be in those places where there's lots of printing, handing around and emailing and back and forth. It's here where we've noticed we've got the biggest opportunities for gains.

"There are also Finance processes that have traditionally required that a document is printed out, edited, signed, scanned, then saved in Objective.

"By using Objective properly, which is simply by building a

workflow around the document, we don't actually need to print it anymore, it's just done via approvals within a workflow in Objective, which is as rigorous as a physical signing but is much easier to track.

"We've just introduced an expense management system called Concur in an effort to reduce the error in expense claiming, make it easier on our staff, using e-receipts and automatic email capture, so that people don't have to go to the scanner and scan their receipts in and reconcile them by hand to individual expenses.

"We don't have a huge volume of incoming invoices but the challenge is not immaterial. We operate in a number of offices and all of those invoices come into the individual offices and then they've got to make their way to the central office, then we need to process them, print them, email them back to the person, asking for approval, they print it out, probably sign it, scan it, send it back, it goes on the file. It's just the nature of having that sort of documentation.

"Concur documents will be digital from the moment they're received. We receive everything via email, so the documents never need to go out of the digital environment right up to payment.

"They can get processed through the workflow for approval and they're always trackable as to where they went, who approved it, and their approval limit," said Tregoning.

Outside of Finance, Human Resources is the department that typically faces the biggest challenge in making itself paper free.

Pauline Nel, Leader, People and Culture at Objective Corporation, explains the company took a Big Bang approach in 2016 by digitising all of its personnel files and placing them in Objective.

"We already had some information in Objective, however when we moved we decided to digitise everything and do away with all of the paper-based files. Everything was transferred into Objective.

That way, managers, employees, Finance and People and Culture all have access to the relevant information they need. We own the file structure and the files and we update them as necessary," said Nel.

"The other big change came when we digitised our annual review process, changing from annual reviews to quarterly check-ins. Previously, people had typed out their reviews and printed them off but that was all put online."

There are also a range of internal HR process that required printed and signed forms that are being automated via workflows in Objective.

"We've reduced our paper significantly, which also helps us hugely with our working remotely. Our team is diverse, and they're globally located.

"People work from home regularly and they are easily able to share information via the wiki, which functions like an intranet providing access to our policy and procedures documents which are stored in Objective.

Worry Me, Natural Language Processing Doesn't

by Adrian Lee, Gartner

The Newsweek headline screamed, "Robots Can Now Read Better Than Humans, Putting Millions of Jobs At Risk" . I nearly drowned laughing into my morning coffee. It was a slow news day?

The story described a reading accuracy test that pitched Alibaba's natural language processing (NLP) AI versus a 'rival human'. Yes, the robot outdid the human by a score of 82.44 versus 82.305. Yes, that's right, a difference of 0.135.

The article did not continue on to reveal which were the millions of jobs at risk. So, the alarmist stance that massive job cuts were on the horizon didn't worry me. Yet.

To put things into perspective, Gartner currently has over 900 research articles on the topic of conversational platforms, with more than 46 different analysts investigating the area of conversational AI.

Oh, Natural Language Processing (NLP) is the comprehension by computers of the structure and meaning of human languages, allowing users to interact with the computer using natural sentences.

NLP features are dynamic and are evolving within conversational platforms. The one refrain I have for our clients when I advise on conversational platforms is this: we have so much more to learn.

The 'processing' of structured language has increased dramatically, especially in the advancement of entity recognition, machine translation, and text categorisation driven by ever faster and low latency machine learning instances in the cloud.

But the 'understanding' of meaning – inference, sentiment, relations, and variations, are still work in progress.

Seek not to process, but to understand. By which, I refer to Natural Language Understanding (NLU), and that's important. for you to see the big picture. Below. I meant it, literally.

We still need to make sure the semantic aspects of the technology work. This is what drives the 'understanding' of human by machine.

As chatbots proliferate across customer service, financial services, retail, government and even healthcare; the ability of technology vendors to provide contextually aware, multiturn-based natural-language conversations presents an



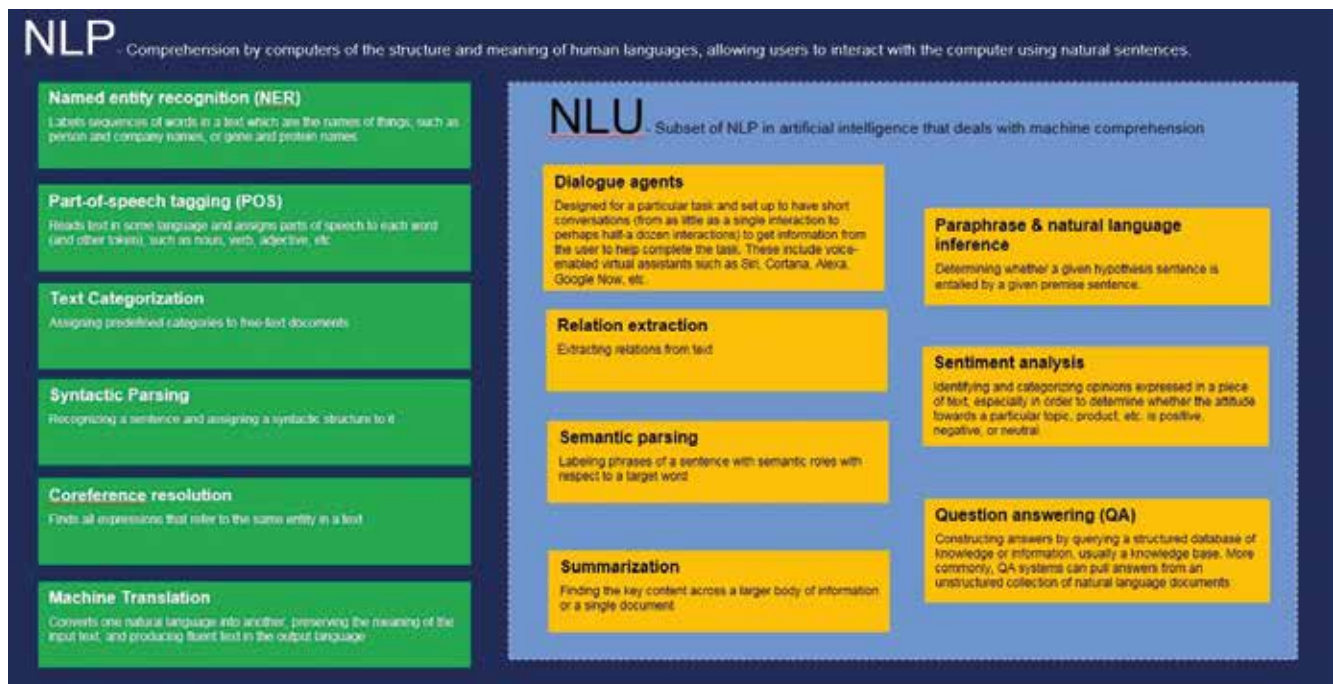
ongoing challenge to natural language understanding (NLU) handling. This is especially the case in the areas of semantic parsing and natural-language inferences.

Ambiguities in semantics arise when there are multiple grammatical interpretations possible. "Giant road bike" and "Giant road bike" on a digital commerce site can mean very different outcomes if the semantics engine cannot infer that "Giant" refers to a brand of bicycle and not the size of the bike in question. But you already knew that.

I shall stop here. If you want to read more about NLP or NLU and how it impacts digital commerce, please click [here](#) . Or we could get that same bot to do it.

Either way, you shouldn't let it worry you.

Adrian Lee is a Research Director at Gartner, Inc. He focuses on providing advice and market guidance on the overall personal technology environment, encompassing devices, services, apps and ecosystems.





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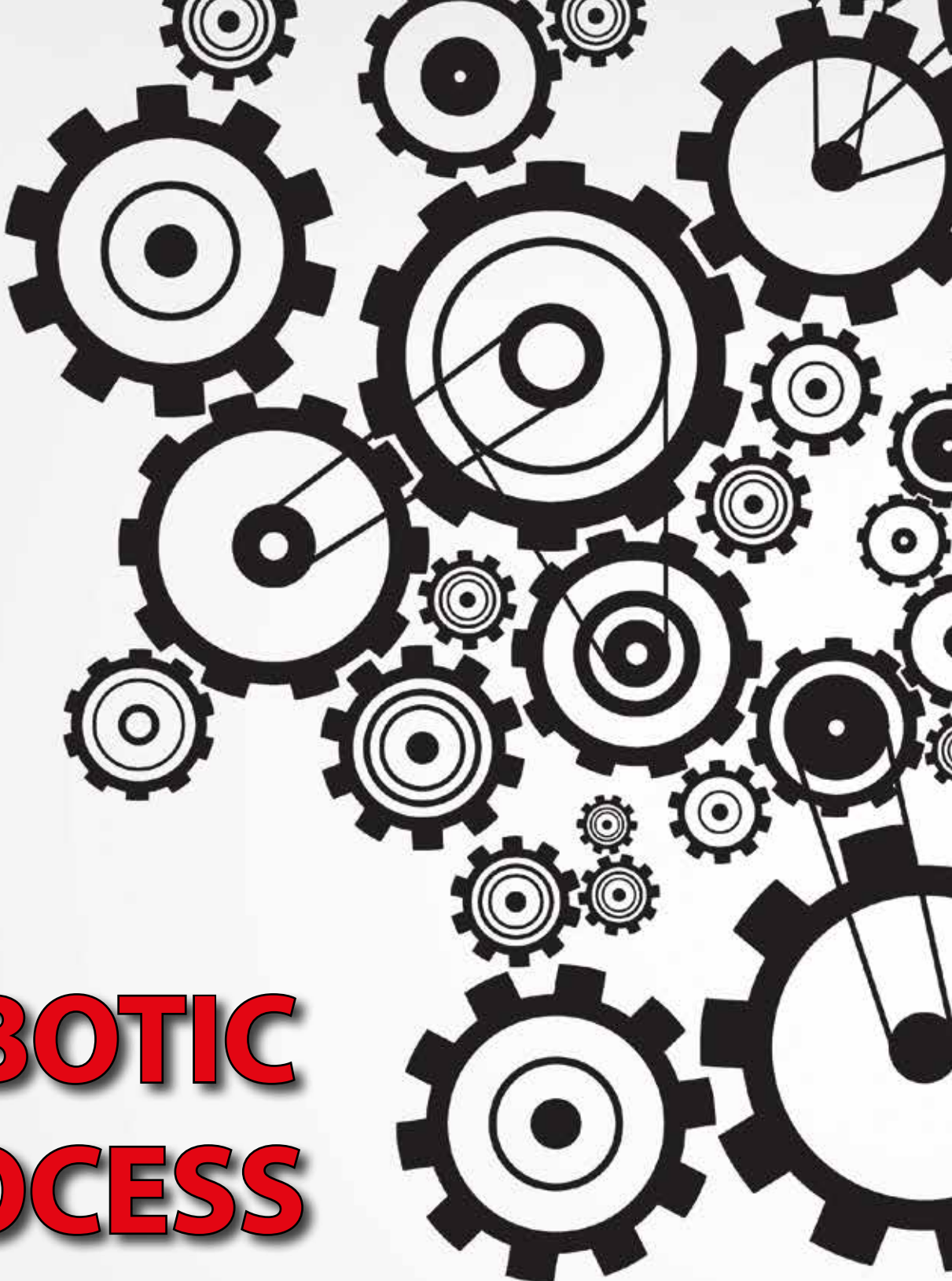
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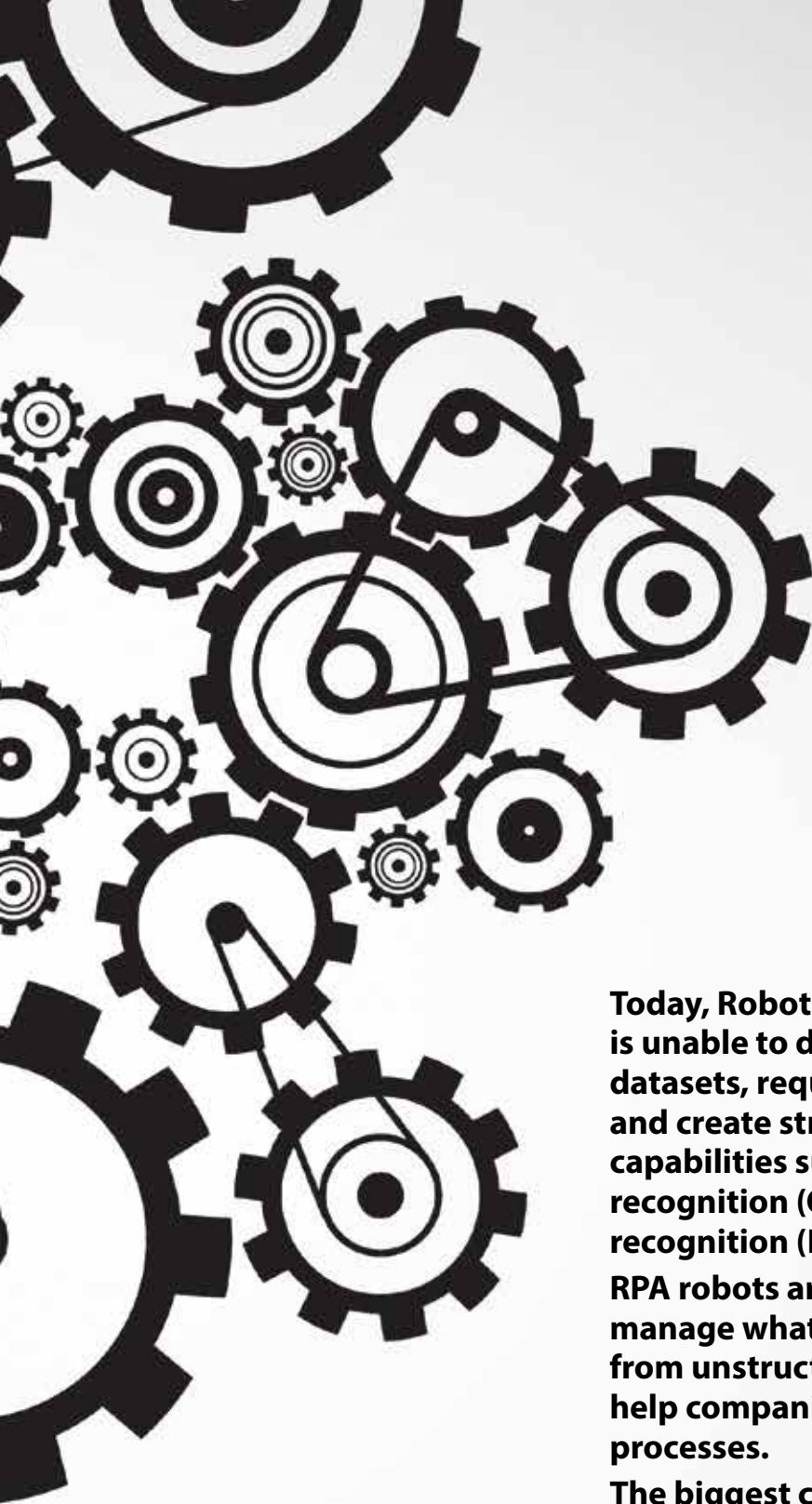
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ROBOTIC PROCESS AUTOMATION

By Bogdan Nedelcov





Today, Robotic Process Automation (RPA) is unable to directly manage unstructured datasets, requiring robots to first extract and create structured data using advanced capabilities such as optical character recognition (OCR) and natural language recognition (NLR).

RPA robots are then able to sort and manage what is essentially a transcription from unstructured to structured data to help companies execute any number of processes.

The biggest challenges for RPA lie with unstructured data.

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Robotic Process Automation

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Unstructured data more or less means any kind of information that doesn't conform to fixed-rules or constraints. This means data that is variable in length and that is completely unpredictable when it comes to anticipating how or in what form this data, or content, come into play.

An email is a good example — an email can be any length, contain any number of content forms, and has little room for predictability in terms of the metadata in the email itself.

As with our email example, RPA robots can take this newly structured data extracted from a message and use it to help fill customer request forms, invoice generation & cross-checking, and other operational tasks.

Perhaps the biggest challenges for RPA with managing the transition between structured and unstructured data are both managing the sheer volume of data that requires this treatment and creating the right templates from which to facilitate the movement from unstructured to structured.

Before an automation robot can understand the data, a template, or roadmap in a sense, must be created which understands this particular transition. Because unstructured data comes in all forms, lengths, and contexts, creating enough of the right templates is something of a monumental task.

For example, on an invoice, data fields for line items other than a company's name, address, etc, have to be created manually because these fields vary quite a bit in nature given the situation or context.

At UiPath, we are confident RPA will be able to accomplish these tasks with near 80 percent or higher efficiency in the very near future.

Another challenge for RPA with unstructured data is human or manual error in inputting the wrong information in coordination with an RPA robot.

While a successful automation will still be able to be executed, the results of that automation may very well be incorrect or

inaccurate. This is one area where I wish there was greater understanding about how RPA solutions work in tandem with human intervention.

The value proposition for RPA

Yes, automation robots are a critical value proposition for facilitating the transition and management of unstructured to structured data, particularly when it comes to document processing and security. Because documents, especially invoices, and the information therein can come to companies in a variety of different ways (emails, snail mail, etc), companies can deploy an OCR engine to extract the necessary data based on predefined templates or structures.

This also works for documents like purchase orders as well. It allows companies to cross check invoices against purchase orders to make sure resources going out match resources coming in, creating greater stability and accuracy for financial management. This also helps manage a company's security by helping alert managers to any exceptions or deviations relative to ledgers or bookkeeping.

So, by enhancing a company's ability to streamline how they manage invoices, purchase orders, or other financial documents, you increase the financial security and efficacy of business practices and ensure that Financial Compliance standards are met.

But perhaps the biggest value proposition for RPA with structured and unstructured data is the breakdown between structured and unstructured in today's business world. About 90 percent of data types most commonly seen in the global business landscape fall into the structured category; however, with the tasks humans engage in, about 50 percent is in the unstructured category. If RPA can help eliminate or supplement working with human intervention with this unstructured category, this allows for companies to become more agile and competitive.

Bogdan Nedelcov is a Senior Product Manager at UiPath, a leading Robotic Process Automation vendor.



Which RPA Software should I use?

By Doug Hudgeon

Robotic Process Automation (RPA) software is in vogue these days. Over the past 12 months, I've used three different software solutions for different clients and thought I'd share my experiences to help fill a gap in the RPA information available online.

Current RPA solutions tend to benefit human-involved processes with simple tasks and structured data at a high volume. It is anticipated that RPA solutions will continue to evolve to being able to handle unstructured data and complex tasks.

There have been lots of articles written about why you should implement RPA software (improve consistency of repetitive processes, reduce cost, improve reportability of operations) and innumerable articles on how to implement an RPA project (start with a pilot, build capability and expand), but there are very few articles on which software to use.

So, to help fill that gap, here's what I've come to realise:

- It actually doesn't matter what RPA software you use.

This is true, at least, from an output perspective. Whilst each of the different software packages have strengths and weaknesses, unsurprisingly, they are all pretty good at automating processes. The differences in the software relate to:

- how the vendors licence their software and
- the fit of the software with the skillset of your team.

RPA Licencing Models

It's pretty clear from the different models being used by RPA providers that they are still trying to figure out how to make money from RPA software.

The licencing models range from a Blue Prism you-can-only-use-our-software-if-you're-a-big-consulting-firm-willing-to-put-a-shed-load-of-staff-through-our-expensive-training-program to a WorkFusion you-can-use-our-software-for-nothing-provided-you-don't-need-to-connect-to-an-API.

I categorise the vendors into two main groups:

- Those who think the major consulting firms will keep a strangle-hold on RPA, and
- those who think that the RPA software winner will ride to victory on a ground-swell of support from end users.

The first group includes software vendors such as Blue Prism. I call this the Siebel model. The second group includes vendors such as UIPath, WorkFusion and Softomotive who are pursuing a number of different models ranging from cripple-ware (WorkFusion), to cripple-licencing (UIPath) to single-robot deployment licencing (Softomotive).

Below are my views on each of these approaches:

The Siebel model

Blue Prism and others in this group of vendors only permit consulting groups who have put a number of staff through an extensive training program to implement their software. I can't see this being the winning business model in the RPA space. I see a future where almost every company can automate their own processes in the same way that today almost every company can create their own spreadsheets and presentations. Blue Prism's Siebel-like model will inevitably be swept away by this wave.

The WorkFusion cripple-ware model

WorkFusion takes a different approach to licencing. They want as many people as possible to use their software so you can download RPA Express at no cost and go through their training exercises in your own time. It's a capable piece of software with the ability to use Groovy (a Java-based language) to write your own functions.

WorkFusion's business model is based on users moving from RPA Express to their Enterprise-level Smart Process Automation (SPA) application.

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From a licencing perspective, you can use the Express application in your organisation but it is missing some key features available in the SPA application — most notably, from my perspective, is the ability to easily connect to APIs.

I like this model better than the Siebel model. I can see a technically-inclined user in an enterprise:

- picking up WorkFusion Express,
- doing something useful with it,
- realising that they need the SPA version to expand their usage, and
- getting budget and buying SPA.

The hardest part of crippleware is deciding which parts to cripple and managing your userbase who will, at times, be pissed off that they cannot do what they need to do without buying a licence.

If you and your team come from a Java background, WorkFusion is a good choice for you.

The UIPath cripple-licence model

UIPath has taken a different approach to WorkFusion. You can download the fully-functional version of the application at no cost but:

- you don't get access to the Orchestrator component that allows you easily manage an army of bots, and
- you can only deploy it without a commercial licence if your company has under \$1M in revenue.

Technically, this approach is easier to manage than cripple-ware, but it comes with some risks to their business model.

A reasonably technical user can push robot usage data to an API which would allow them to somewhat mimic the reporting functionality of the Orchestrator component. If they do this, and they don't care about licencing violations, then they can use the software for free.

UIPath is betting that this will be a rare occurrence and, at this point in time, I believe it is. But I see it as almost inevitable that someone will release an open-source Orchestrator that will be easy to use with UIPath and UIPath will need to reconsider their model.

UIPath is an excellent piece of software and their training resources are exceptional. Building and integrating your own .Net functions is a trivial exercise. If you and your team come from a .Net background it would be hard to go past UIPath.

The Softomotive single-robot licence

Softomotive is my go-to software for most of my smaller clients

because of the single-robot licencing model available in the Winautomation edition .

Unlike WorkFusion and UIPath, you can't extend the software by writing your own modules but the functions native to the application are sufficient for most use cases I encounter.

Runtime licences for a single robot can be purchased for a one-off fee of US\$59 and a machine-licence that allows an unlimited number of bots to run on a single machine can be purchased for US\$279

Like UIPath, Softomotive has an upgrade path to Process Robot which allows the orchestration and monitoring of robots.

Whilst the training material for Softomotive products falls short of UIPath and WorkFusion, the application is easier to learn and easier to use than either of its competitors. You can get up and running very quickly even if you don't have a programming background.

The coming tsunami

So, which model will reign supreme? In my view, none of the above. Siebel died not only because of the rise of Salesforce but because the software "Suite" providers started including sales and marketing functionality at no additional licencing cost. This, combined with the rise of solutions like Salesforce, ate away Siebel's customer base from both ends — the enterprise market and the SME market. RPA software is headed along a similar trajectory.

Most of the solutions that I deploy rely on cloud functionality. I use RPA software to handle the interaction with on-premise systems but, as soon as practicable, I push the data to an AWS Lambda function or, more frequently, an Azure Logic App to manipulate the information and manage the workflows. This is a robust development pattern because, as early in the process as possible, it moves data from systems that are not in my control onto systems that are, thus reducing the number of things that can go wrong.

This pattern is not escaping the attention of the cloud platform providers and I expect to see RPA offerings emerge from all of the major cloud platform providers — either through in-house development or acquisition. In fact, I'm surprised that Microsoft has not yet acquired UIPath or Softomotive and that Oracle or IBM has not yet picked up WorkFusion.

In any case, despite their performance over the past year, I won't be buying shares in Blue Prism right now.

Doug Hudgeon is an experienced electronic invoicing and back office automation expert and Director and Founder of My Business Automated <http://mybusinessautomated.com/>. Contact him at doug@mybusinessautomated.com



RPA offers \$2 trillion in savings: PwC

Consulting firm PwC believes that Automation technologies like Robotic Process Automation (RPA) could have an effect on service businesses that would be as dramatic as the effect that conventional robots have had on manufacturing.

It estimates over 45% of workplace activities can be automated providing a potential \$2 trillion in savings across the globe.

Put simply, RPA is a set of concepts and technologies designed to intelligently automate repetitive business, industrial, and other tasks. RPA has little to do with what we commonly understand as “robots” in the conventional sense of the word. Rather, RPA is defined by algorithms that are built to enhance return on investment (ROI), boost execution speed, and improve the quality of business results.

These algorithms follow logical rules, using structured (and some unstructured) data to quickly resolve issues en masse and to deal with problems that human workers would find tedious and time-consuming. The algorithms used in RPA lack the complexity of most cutting-edge AI solutions, but that relative simplicity means they can be deployed on a much wider scale and in a variety of industry settings.

Currently, RPA is finding its greatest foothold in the world of financial services, in which organisations use it to process insurance claims, reconcile financial statements, and resolve credit card disputes, among other tasks. Online retailers also use RPA. When you get a shipping notice that a product you ordered online has left the warehouse, it's likely that RPA technology was working behind the scenes to send that message automatically, with no human involved.

One of the biggest advantages of RPA is its ease of deployment. RPA typically does not involve a large-scale tech integration. Instead, it can be installed one user at a time.

Tech-savvy professionals may install RPA software on their own computers (often without involving IT) and get up and running within a matter of days. This capability makes RPA available to a range of potential users, since it avoids the need for enterprise-wide deployment.

At the same time, RPA is poised to become a widespread enterprise technology, making automation part of the core business process rather than a one-off solution to fix problems on a limited scale. As management embraces RPA across an organisation, it stands to realize a larger share of that \$2 trillion in savings.

AI-trained algorithms that are part of RPA initiatives work 24 hours a day without complaint, require no oversight, and can quickly and easily scale. Because the barriers to implementation are so minimal, there's little reason for most enterprises to delay

piloting RPA on a limited basis. In most cases, PwC estimates company leaders will see tangible and measurable results within a few weeks or months.

NICE enhances Robotic Automation with ABBYY OCR

NICE, a global provider of Robotic Process Automation (RPA) with offices in Sydney and Melbourne, has enhanced its platform with the incorporation of advanced ABBYY Optical Character Recognition (OCR). In an agreement with the software vendor, NICE has extended the cognitive automation capabilities of its Robotic Automation offering to include enhanced data extraction from scanned documents and images.

The OCR solution is sophisticated, automated, and fully integrated into the workflow of complex business process automations, supported by NICE, that seamlessly transition between fully robotic and human-supported input as needed. The result is more accurate, faster and higher quality textual output, enabling NICE robots to automate more tasks, while reducing operating and training costs.

One of the most challenging and expensive operational scenarios for many businesses is the manual processing of scanned documents, which, according to the Institute of Finance and Management's (IOFM) Accounts Payable Benchmark and Analysis Study, still accounts for the majority of invoices received by more than 50 percent of companies today.

ABBYY's advanced OCR engine, fully embedded into NICE's RPA platform, replaces the very time and labour-intensive manual processing of these invoices with an automated and rapid extraction, organisation and formatting of text, including data from within tables.

For maximum accuracy, NICE Robotic Automation displays a call-out for human input to verify the OCR reading of any unclear elements of a scanned document which may contain handwritten or overlapping text.

Once confirmed or corrected, the fully automated processing continues. At the same time, the NICE platform's artificial intelligence capabilities continually enable the robots to learn from the human intervention and evolve a growing intelligence and proficiency to manage OCR exceptions.

As part of NICE's enterprise-grade robotic process automation platform, the advanced OCR engine is fully scalable and recognises over 200 different languages. With the capability to process screen imagery from 3rd party applications running on remote machines, the solution enables higher quality and more robust surface automation.

<https://www.nice.com/worldwide-offices>



A photograph of a warehouse interior. A red forklift is in the foreground, moving a pallet loaded with boxes. The warehouse has high ceilings and tall shelving units filled with boxes. The floor is polished and reflects the overhead lights.

How Distribution Benefits From The Next Evolution Of Automated Document Processing

by Steve Smith

When you hear talk about robotics in the distribution centre, you may envision some of the innovations Amazon is using to streamline operations — and make headlines. Maybe you picture self-guided forklifts equipped with sensors and automatic controls stacking inventory in racks soaring high above the distribution to fulfilment without humans getting in the way and slowing things down. But you might be surprised to learn that robots are transforming more than just the physical tasks of fulfilment centres.

The last several years have seen drastic shifts in every link of the supply chain. Today, lines of business have to demonstrate the ability to scale in order to meet the ever-increasing speeds of commerce.

While physical robots may help warehouses and distribution centres move products from point A to point B more quickly, there's only so much such operations can be sped up without a correlating efficiency in back-office processes.

But document-heavy, transactional processes are benefitting from "robots," too.

Robotic process automation (RPA) uses computer software to push data from one application to the next through automated communication systems. RPA is the latest iteration in a lightning-fast evolution of automated document processing technology that started with EDI.

More than likely, your fulfilment centre already uses an electronic data interchange (EDI). These systems grab information from the sales order, process it through the warehouse and feed it to



an invoicing system in a standard electronic format according to a pre-configured mapping system.

EDIs are a critical first step in the digitization of the supply chain and fulfilment operations, but they still require a significant amount of manual processing in order to handle exceptions such as incorrect pricing or customer information.

EDI systems, then, can't really be classified as "automated" because at their core, they're still manual systems. They evolve through new technologies like dynamic data capturing (DDC), graphical user interfaces and optical character recognition (OCR), which come together to create fully automated capabilities for document-heavy workloads such as accounts payable and sales order processing.

Document processing automation is really all about improving communication and collaboration between key stakeholders in a customer transaction.

As business processes become increasingly digitized, the lines between departmental functions like customer service, fulfilment and accounting are blurring. Customers now expect every interaction to move at "Amazon speed," and businesses are scrambling to increase transparency with innovations like customer portals and online ordering capabilities. These technologies have led to truly automated processes that virtually eliminate manual touchpoints.

A report on sales order solutions for the supply chain from Gartner and Esker shows a range of positive results from document processing automation, including:

- 55 percent lower order processing costs
- 99.6 percent order entry accuracy rate
- 60 percent reduction of labour overhead in order entry
- 40 percent increase in electronic throughput rate

While it can be difficult to pinpoint exactly where traditional document process automation ends and RPA begins, most experts agree that RPA's major differentiator is the ability to essentially automate the automated processes.

In other words, those tasks that were performed at the edges of automation, such as review and approval, quality assurance and inspection, were still entrusted only to human workers for a variety of reasons like risk control or the historically high cost of changing legacy workflows.

But the speed of business and the sheer volume of transactions today necessitate that competitive organizations evolve to RPA. Think of it this way: Fifteen years ago, if you needed to buy groceries, you went to the store, physically picked out the products you wanted to buy and gave your credit card to a cashier to manually swipe. Then cashiers began to be eliminated from the equation via self-checkout kiosks, where you ring up your own

groceries and directly pay a machine.

Today, an increasing number of consumers don't make the trip to the grocery store at all. Instead, they pick out the products they need, pay online and have their groceries delivered directly to their door.

The core function - purchasing groceries - was automated long ago. The latest evolution automated those steps at the edges of the purchase — picking out the products, ringing them up and getting them home.

A good rule of thumb when identifying areas where RPA can add value to distribution centre operations is to look at any process that is performed over and over, such as funneling fulfilled orders to accounting for invoicing, or where the process is one of redundancy, like reviewing or auditing processes. After all, if you have automated "robots" performing document processing tasks with near-perfect results, how much value can a human auditor add?

The bottom line is that these "robots" can perform the same tasks currently performed by humans without ever slowing or making errors.

According to a report from Aberdeen, there are significant gaps between distributors considered "Leaders" (the top 30 percent of performers) and those classified as "Followers" (the remaining 70 percent of organizations), such as:

- Complete & on-time delivery: Deliveries from Leaders are correct 95.4 percent of the time compared to only 86.4 percent for Followers.
- Landed per unit costs: Year-on-year, "Leaders" have decreased their total costs by 0.5 percent. In contrast, the cost for "Followers" increased 8.5 percent.
- Out-of-Stock –inventory costs: Through automation, "Leaders" have decreased their out-of-stock frequency by 7.5 percent year-on-year, as opposed to "Followers," whose out-of-stock inventory rates increase 0.9 percent.

If distribution is seeing an invasion of the robots, then it's a welcome sight. Fulfilment centres no longer operate in a silo, and warehouse managers must expand their purview to include touchpoints at the edges of their link in the supply chain.

Digital technology has changed the distribution landscape at a fundamental level, and many managers are struggling to find ways to further optimize their operations. For those searching for ways to streamline their warehouses and gain the competitive edge, they'll find their solution in robotics.

Steve Smith is U.S. chief operating officer at Esker, a global provider in cloud-based document process software to automate order processing, accounts receivable, accounts payable, purchasing and more. Smith is responsible for all operations in all of the Americas.



Legal Issues in Robotic Process Automation

By Tim Wright, Partner and Antony Bott, Special Counsel,
Pillsbury Winthrop Shaw Pittman LLP

You can't move in the outsourcing industry without hearing about Robotic Process Automation (RPA). And while it might sound like terminology cribbed from a sci-fi novel, the truth is that RPA is already here, and it is transforming the way modern businesses operate.

Along with related developments in machine learning and artificial intelligence, automation as a whole has been characterised by the former chief scientist of Baidu as being “as transformative for society as electricity.” Fuelled by continuing developments in computing power, big data, storage and connectivity, the opportunity for companies is to save money, while operating more effectively, scalably and compliantly – it is, in many senses, a compelling opportunity.

Opponents of RPA highlight that it is disruptive, both in relation to the technology and the logistics, and in its interrelation with human nature and organizational politics – but others suggest those are challenges that can be managed, and that the bigger risk is in not implementing RPA, and then being out-competed by those that have embraced the innovation. As with any business change, the answer is to fully understand and consider the decisions, to negotiate contracts that give the right balance of protection and flexibility, and to manage the change with appropriate sensitivity.

What is RPA?

The Institute for Robotic Process Automation describes RPA as “the application of technology that allows employees in a company to configure computer software or a ‘robot’ to capture and interpret existing applications for processing a transaction, manipulating data, triggering responses and communicating with other digital systems.”

Put more simply, RPA is technology that enables computer software to automate human activities that are manual, repetitive and rule-based. RPA works best where the activities in question are high-volume and clearly definable. It has been successfully deployed across a broad array of business functions such as finance, procurement, supply chain management, accounting, customer service and human resources. Examples of tasks that can be automated include data entry, purchase order issuing, invoice processing, know your customer (KYC) checking, fraudulent account closure, and personal loan application processing. RPA software replaces the human activity, working more quickly, accurately, and tirelessly than any person, freeing them to up to tackle tasks benefiting more from emotional intelligence, reasoning, and interaction with the customer.

RPA vs Artificial Intelligence (AI)

While both RPA, and its “big brother” AI, are forms of automation (where a task previously performed by a human, is carried out by some form of automated system), there is a qualitative difference between them.

RPA is “robotic”—it is programmed to carry out a specific set of steps, and it will do so repeatedly and reliably, exactly as it has been coded. In contrast, AI uses machine learning to adapt to outcomes and changes in environment. When it produces a less than optimal output, or encounters a problem it hasn't seen before, it learns.

This makes AI suitable for automating much more complex tasks, involving highly subjective decisions tackled by the use of pattern analysis. Unlike RPA, AI can make sense of unstructured data, which is ambiguous, complex and a challenge to process. Put simply: RPA is programmed. AI is trained.



Why does this matter? AI may produce an answer with a better, more productive outcome, but it may be difficult or impossible to understand how it reached that answer—either because the ‘black box’ of the system is opaque by nature, or because the particular AI system is proprietary and the owner is not willing to open it up to analysis.

How can users trust in AI-delivered outcomes if the inner workings of the system are not easily interpretable by a human? This perceived or actual loss of control may mean in the more immediate future, businesses are more ready and willing to deploy RPA than AI. Further, where a business builds an AI solution on a third-party platform, there is a risk of lock-in because the ‘machine-learning’ built up over a period of service may not be transferrable to an alternative third-party AI system.

Deploying AI (whether on its own in conjunction with RPA) offers many exciting opportunities for businesses beyond automating the kinds of back office tasks and activities which RPA is so good at.

Why use RPA?

The primary driver for the implementation of many RPA systems is the significant cost savings opportunities they provide – typically somewhere between one-third and one-fifth of the cost of a full-time equivalent (FTE) member of personnel, depending on the location of that individual. There are, however, a number of other potential benefits:

- improved quality - through the elimination of human errors and delays;
- better productivity - short return on investment timeframe – RPA deployments can be done over short timescales with minimal configuration or integration needed;
- a happier, more motivated workforce - a robotic workforce enables redeployment of personnel to focus on higher value and more complex tasks;
- enhanced resilience and scalability - digital labour doesn't take holidays or succumb to illness, will carry out the prescribed functions in a consistent manner, and can be scaled up or down to meet changes in demand;
- enhanced collection of transactional data; and
- improved compliance and regulatory risk - achieved through all of the above combined with better management information and an auditable transaction trail.

More generally, deploying RPA allows an organisation to re-examine its operational model. For example, processes which were previously offshored can be repatriated and automated. Large, inflexible outsourcing agreements, which are often heavily dependent on FTE pricing models, can be renegotiated and/or broken up.

FTEs who previously performed the affected activities may be redeployed to more valuable roles, although in some circumstances their positions in the organisation may become redundant.

Procurement Strategy

Procurement and sourcing groups regularly include RPA (and AI) capability as part of their evaluation frameworks. Pre-contract diligence issues (many of which need to be addressed in the contract) include:

- financial and operational stability of the software vendor;
- types of data which will be processed, which can mean data security and data privacy concerns;
- interfaces needed with legacy systems;
- ownership of the intellectual property in the software;
- ease of exit transition to avoid single technology/vendor lock-in;
- pricing model options, and how to handle changes to the customer's requirements;
- defining the "right to use" the software and understanding the limits of any licence;
- evaluating the availability of disaster recovery and business continuity solutions; and
- regulated customers will need to address any specific regulatory issues and requirements.

Customers should also review legacy software and system licences to ensure there are no unintended consequences, e.g., price increases under enterprise software agreements resulting from new system interfaces and data feeds. Other 'internal' items will also need to be addressed including the impact on staff and the possibility of redundancy.

Contracting Approach

RPA implementations usually follow one of two models: DIY and Outsourced.

With the DIY model, the customer enters into a contract (similar to a software licence or software as a service agreement) with the RPA software vendor.

The contract will focus on the technology being acquired.

The software vendor may also provide implementation and configuration support. Alternatively, this may be handled internally and/or with assistance from an external consulting firm. The agreement with the software vendor may also cover ongoing maintenance and management services.

With the Outsourced model, a new or existing outsourcing (or managed services) agreement is used such that some component of the outsourced services is delivered using RPA technology.

The contract will focus on the services being performed (implementation and ongoing), rather than the technology used to perform them.

Unless the service provider owns the RPA software, it will need to license it from the owner.

The service provider will perform the services itself or use a subcontractor to do so, including any ongoing maintenance and management services that may be needed.

In the past, the RPA deployments often started as series of small pilots, on a process-by-process basis; however, as confidence in the technology has grown, the scale of deployments has grown, often in a relatively unplanned manner.

Customers should look to structure contracts, whether DIY or Outsourced, to ensure that their leverage is maximised enabling them to flex and scale their RPA solutions as their business requirements change, as well as to benefit from future technological advances.

Businesses typically have at least one, and often many, outsourced service providers, across a wide range of IT and business processes. These outsourcing agreements may be FTE-based, e.g., where the services are delivered from a lower

cost country such as India or the Philippines. Some will have been put in place before the rise of RPA in the relevant sector or domain.

Many service providers will, however, by now already be using RPA on at least some of their customers' accounts. Prior experience shows that most service providers will usually try to avoid a re-bid situation and a proactive approach by the customer will often lead to a positive negotiated outcome even if the contract is completely silent, especially where the customer can offer some incentive such as an extended term or scope of work.

Key Contractual Protections

Important items to be covered and/or negotiated include:

- licence scope, usage permissions (including managed service providers) and volume caps;
- service levels and performance metrics (which could be in line for adjustment, given the improved speed, reliability and quality that RPA services may offer);
- intellectual property rights and indemnities;
- liability caps and exclusions;
- pricing terms and model (e.g., per unit (robot) versus outcome pricing, implementation and supports costs; alternatively, a managed services fee);
- change management; and
- exit transition support.

Governance Framework

The program operating model (including governance, resourcing and execution responsibilities) will also be important. In the Outsourced model, the agreement will usually already incorporate a governance schedule covering both implementation (initial and new projects) and steady state; in the DIY model, the customer (perhaps with an external consulting firm) will work with the software vendor to define required governance.

More generally speaking, customers looking to build RPA centres of excellence within their own organisations, should also look to define and document RPA best practices, challenges in identifying automation opportunities and optimizing return on investment, criteria for selecting RPA tools and technologies, as well as monitoring emerging RPA/AI technologies and capabilities.

People Considerations

The work force carrying out these tasks is digital, not human, but its deployment will impact people nonetheless. Customers looking to implement RPA should engage with human resources early and in some cases with works councils and employee representatives as appropriate.

It is also important that the business appoints a senior person to champion the benefits of RPA, both prior to implementation as well as afterwards to communicate successes achieved.

In conclusion, RPA service delivery will have a major transformative impact on how businesses operate. By replacing people with automated systems, RPA can enable large volumes of data to be processed in a significantly reduced time, while delivering unparalleled accuracy, visibility, and a reduction of risk.

In what most commentators predict will be a fast-moving, fast-changing environment, businesses will need to stay alert to the strategic decisions, opportunities and risks that will present.

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Will Procurement Automation be Transformed by Compulsory Real-Time Tax Controls?

By Christiaan van der Valk

Companies should be preparing for a world where government requirements for real-time transaction controls will be a major force in shaping the business-to-business (B2B) transaction automation systems of the future. With cloud becoming the principal deployment model for managing different types of B2B transactions, this revolution toward much-reduced freedom for companies to specify their process requirements can be expected to transform the way companies interact and contract with solution vendors.

Let me explain through a couple of scenarios. This first one will sound familiar and perfectly logical to many readers:

You're a large enterprise and you want to purchase a third-party solution that can help you better control your indirect or strategic spend. You require end-to-end process automation, and therefore elimination of paper, as a way to maximize the effectiveness and cost savings to be achieved through such a service. Obviously, this includes de-materialising supplier invoices wherever that's legally permitted. So once you've preselected a number of procure-to-pay vendors, you ask your tax or legal team to make sure they're comfortable with the legality of the e-invoicing included in the services offered.

This scenario no longer reflects the reality of leading global enterprises though. In just a few years, major developments in tax law around the world have reversed the vendor assessment logic. Here's a more realistic scenario demonstrating what's changing: You're a large enterprise and your management team just spent half a day in yet another escalation meeting. Once again, a country subsidiary has sounded the alarm because it has only a couple of months left to adopt electronic invoicing due to a local tax authority mandate. If the mandate deadline isn't met, your local business, and therewith x% of your global sales and/or y% of your critical supplies, will grind to a halt overnight. For months, the subsidiary has been exchanging angry mails with your procurement, supply chain and/or IT department where the latter insisted on the subsidiary using a corporation-wide strategic IT solution. The subsidiary has repeatedly explained that that solution doesn't even come close to meeting the very specific technical and process requirements laid down by their tax administration.

Caught between a rock and a hard place, your management again had no option but to grant the subsidiary approval to install a local IT solution to meet the mandate deadline. And with that, a good part of the control, best practice, business intelligence and economies of scale benefits that you work so hard to achieve with global business-to-business process platforms will not be achieved for that subsidiary.

I see the above scenario happening, sometimes several times at companies TrustWeaver ends up helping. Our partners often involve us when the dialogue with such companies becomes all about compliance. This recent change in market behaviour is being driven by the fact that more and more tax administrations are experimenting with real-time controls. Governments have realized that real-time controls can strike that long sought-after balance between maximizing tax collection and minimizing expensive and disruptive audits. Unfortunately, we're not seeing any real standardization between the national systems yet.

So how are companies responding?

When the second scenario happens a few times, corporate management often steps in to make radical changes to the way business-to-business IT solutions are sourced. From now on, they decide, e-invoicing compliance will be the litmus test and a

non-negotiable precondition before even considering a vendor's automation and savings capabilities.

Some global companies are taking even more radical steps. They are going through every corner of the company with a fine-toothed comb to draw up a map of all invoicing processes in every department, subsidiary, brand and business line. Armed with that map, a global RFP is then launched to find a vendor that can guarantee that the enterprise will never end up facing a similar business risk again.

How is that Affecting B2B Process Automation Procurement?

We're seeing that the number of RFPs seeking business-to-business process automation but starting with a vendor preselection based on global compliance capabilities is exploding. The average value of such RFPs is consequently a very large multiple of the trend in the past 15 years. Whereas a few years ago, an opportunity representing 0.5 million to 2.5 million invoice transactions annually was considered very large by most vendors, today's RFPs often exceed 10 million and may even encompass a significant multiple of that yearly transaction number.

This jump in the size of available deals comes with the need for B2B automation solution vendors to be able to demonstrate that they have a robust approach to compliance monitoring and change management in a number of key areas:

- Legally determined invoice formats and content
- Archiving that meets all localization, timing, privacy and other requirements
- Demonstrable long-term auditability of e-invoices in geographies where real-time controls are not yet (fully) applicable
- The ability to integrate with tax administrations' real-time control platforms using varying authentication protocols, electronic signature specifications, document format specifications and transaction orchestration types

The simple conclusion is this: any B2B transaction automation vendor that wants to become or remain a market leader three to five years from now needs to step up its compliance game.

No solution vendor can at present meet these requirements alone. This is perfectly normal since we're in the eye of a regulatory tsunami with colossal numbers of moving parts and uncertainty. However, it does raise this question: what should companies do to ensure they can handle inevitable e-invoicing mandates in a growing number of countries?

There is an answer. Make sure that whatever solution you choose, whether tactical or strategic, includes an always up-to-date e-invoicing compliance service that automatically manages regulatory changes from anywhere in the world into the world's leading B2B automation platforms. In other words: ask for TrustWeaver.

Christiaan van der Valk is President and Co-Founder of TrustWeaver, a provider of cloud-based trust and compliance services for invoices and other legally critical electronic documents. TrustWeaver has announced the publication of the 9th edition of its white paper on international trends in tax-compliant e-invoicing and e-archiving. The white paper features a summary of the regulatory status in some 90 countries, as well as an in-depth analysis of the ways tax authorities around the world use e-invoices to increase collection rates. The White Paper can be downloaded at <https://www.trustweaver.com/white-paper/>

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KIIDs Recognition: a real case of computer vision application in RPA

By Victor Ayllon , CEO Novayre & Jidoka (Robotic Process Automation)

Although 2018 is expected to be the year that Artificial Intelligence (AI) arrives in the RPA world, it is currently difficult to find many real life applications or concrete examples of robots that demonstrate such capabilities. There is still a long way to go for Intelligent Automation programs to fully adopt cognitive technologies!

We recently worked on an interesting case that presents as a credible example of computer vision use in an RPA scenario. At its core, the scenario is a highly specialised case of data capture from a specific type of PDF document by a back office team at a business process outsourcer (BPO).

The problem for our client arose from a European Commission directive that has forced companies that distribute Investment Funds to publish a document known as KIID (Key Investor Information Document). The objective is to simplify the most relevant information of a Fund, making it much simpler and easy to understand for the investors.

The KIID is a file, usually a PDF, where the following Fund key data must be reflected:

- Fund objective and investment policy.
- Costs and associated expenses.
- Historical profitability.
- Fund risk profile.

Since this document must be constantly updated, Funds distributors (banks and investment companies), are obliged to capture this information to integrate it into their databases and thus be able to offer it to customers via their systems.

Being a repetitive, mechanical and high-volume job (more than 100,000 documents updated several times a year), this is typically outsourced through a bureau which makes it an ideal busi-

ness case for automation . We were able to successfully deploy a Jidoka robot to capture and process this information.

Most of the information in the KIID document is structured, making it possible to program rules based on the patterns in the PDF structure, all except for the Fund Risk Profile data.

A risk profile, rated on a scale of 1 to 7 (ordered from lowest to highest risk), is displayed visually in the document, clearly indicating the risk level of the Fund. Unfortunately, each fund manager has developed their own visual style using different colours & gradient schemes, as can be seen in the image below that highlights six different examples.

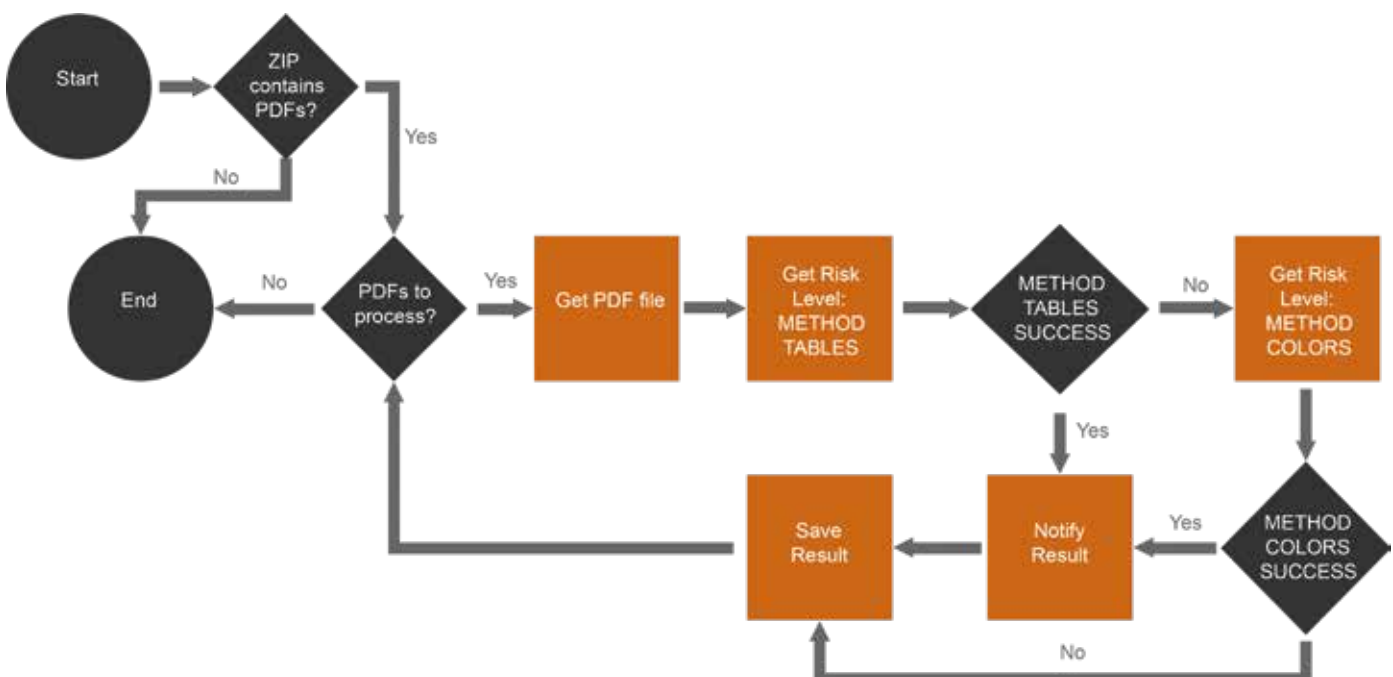
Therefore, the challenge was to use artificial vision techniques to detect the number associated with the level of risk with absolute precision, given the sensitivity of the data for the investor.

The robot firstly uses a technique to identify tables within the document, and once it has selected the right table containing the risk profile, it ensures that it is composed of numbers, detecting which number is the marked one. But there are KIIDs where the numbers are not framed as a table, so the robot must also use a second method to locate the numbers instead based on colours.

Logically, the robot does not "see" the risk scale in the same way as a human. We need to adapt the document and make it "visible" to a machine. These adaptations can assimilate to what our brain does (while still very far from it) carrying out the information that reaches our eyes in the form of light.

The robot takes the PDF document and transforms it into an image, to later transform it into numbers, vectors, and matrices, a much more suitable mode of information for it to process. By the means outlined, we have taught the robot to find the risk scale using dual vision techniques.

In the first place, the robot looks for patterns in the image



that resemble a table. It erodes, dilates and even performs the binary of the image in search of this pattern, discarding those patterns that do not fit within the initial parameters (width, height, position on the page, etc.).

After identifying several tables that are present in the document, it must then find the one that is the risk scale.

How to recognise then which of the tables is the correct one? The answer is, again, by observing it via artificial intelligence, going through the images and analysing their characteristics.

In the case of the risk scale table, its main characteristics will include: a predominant colour (unselected risk values) and at least one other secondary colour (the marked value).

This secondary colour is the interesting one. Once known, the robot focuses its attention on the correct box, and all that remains is to extract the number from the box marked using the OCR technique.

Sometimes the method described above cannot find these patterns, or there is no certainty that one of the tables is the correct one. Normally this happens when the KIID design is not the usual one, and so the risk scale is not a regular table.

For these cases, we have implemented a second method that is able to "filter" the image by a certain colour, which is then used as a parameter. This colour is precisely the colour in which the risk level on the scale is marked.

We could say the robot has to stay focused only on those areas and ignore the rest. Again, all that follows is the extraction of the



value from the risk scale.

Both methods perform common secondary processes to facilitate document viewing:

- Erosion and Dilation: allowing image enhancement or focus.
- Binarisation: transforming the image into comprehensible vectors and matrices for the robot.
- Conversion to grayscale, which "eliminates noise" in low-resolution documents.
- Filter by colours.
- Pixel information extraction.

At Jidoka we are continually looking for new challenges. Do you have something to surprise our software robots? If so, do not hesitate to contact us , we will accept the challenge!

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One day your Data Lake may fit in a cup!

A team of chemists and engineers at prestigious Brown University, an Ivy League institution in the US, are seeking a method to store and manipulate data in a way that has never been done before — by representing data using molecules dissolved in solution. Such a system could have the potential to store billions of terabytes of data in a single flask of liquid.

The project, dubbed “Chemical CPUs: Computational Processing via Ugi Reactions,” will be backed by a \$US4.1 million award from the Defense Advanced Research Projects Agency (DARPA) Molecular Informatics program.

“Collectively, people produce millions of terabytes of data every day, and it’s getting harder and harder to store all that data in small devices,” said Brenda Rubenstein, an assistant professor of chemistry at Brown and the project’s principal investigator.

“The aim of this project is to come up with a new form of storage that is many times more compact than what we currently have. One obvious candidate is molecules.”

Other research groups have started investigating the possibility of using DNA molecules to store information. After all, DNA naturally carries biological data. But the approach Rubenstein and her colleagues are pursuing is different.

They aim to use synthetic molecules, produced in millions of unique combinations, as a means of encoding data, which could be stored in immense quantities in solutions. The data will then be read back out using a high-performance mass spectrometer capable of identifying the molecular combinations.

The approach enables information densities even higher than that of DNA, Rubenstein says, and also has the potential of enabling computation through chemical reactions — actual data processing in solution, which is something that’s never been done before.

“For this project, we want to show that we can read and write information, as well as do some very basic calculations, all in solution,” Rubenstein said. “Later, we’d like to go beyond that and think about how we could hook that up to larger systems.”

Jacob Rosenstein, an assistant professor in Brown’s School of Engineering and co-principal investigator of the project, says that while the complexity of performing such computations is daunting, the potential computing power is immense.

“We can start to think about ways in which the complexity of molecules in solution might be an advantage for some computations,” Rosenstein said. “Fluids are three-dimensional. That dimensionality could potentially be an advantage for things like pattern recognition and search algorithms, which don’t always scale well in two-dimensional circuits.”

As a proof of concept, the team showed that they could successfully encode and read out a small black and white image comprising 81 pixels. Under the DARPA contract, the team will scale that process up, encoding images from machine learning databases, audio files from a speech database, and weather data from the US National Oceanic and Atmospheric Administration. At the end of the first phase of the project, the team aims to have the ability to read and write 100 megabytes of chemical information per day.

There are numerous challenges to meeting those goals. For the 81-bit image, the researchers only needed to synthesise 25 unique molecules. For larger data sets, they’ll need many more — perhaps millions — of distinct molecules. The team plans to synthesize their molecules using Ugi reactions, which are often used in pharmaceutical development to merge several components into one molecule. The technique has not been used, however, at the scale that the team is proposing for information storage.



Jason Sello and Eunsuk Kim, both faculty in Brown’s Department of Chemistry who have expertise in molecular synthesis, will work with Rubenstein and another engineering faculty member, Sherief Reda, to automate and optimize the strategies to synthesize molecules in those dizzying quantities. In addition to the chemistry development, this will involve writing computer-aided design software to optimize the mapping of digital data into mixtures of chemicals.

Another challenge is efficiently detecting distinct signals from all of those molecules during the read-out process. The DARPA contract will support the purchase of a powerful mass spectrometer able to resolve those signals. Peter Weber, a professor of chemistry with expertise in spectroscopy, and research scientist Joseph Geiser will work with the team to optimize the readout system. A group led by Rosenstein, Reda and engineering professor Chris Rose will develop software tools to decode the original digital data from these mass spectrometer readings. Rubenstein, a theoretical chemist, will lead the effort to find the right molecules to use in solution and to develop computational schemes for those molecules. Rose, a communication theorist whose work includes molecular communication, will add his expertise to the theoretical side of the project as well.

In addition to demonstrating a new way to store data, the researchers say that the tools developed for this project could have impact in other domains as well. The high-throughput synthesis, analysis and informatics that will be developed could find use in proteomics and other fields. The research could also be useful in analysing other complex chemical mixtures and in understanding the molecular signalling that occurs in natural systems.

“There are some really daunting challenges involved here, but there is also immense potential for creating the information storage density we’ll need in the future along with other useful technologies,” Rubenstein said. “We think we have the right team assembled to make real progress.”

Veritas Brings Data Classification to ediscovery Platform

Veritas Technologies has unveiled advances to the company's eDiscovery Platform with new data classification features designed to help compliance and investigation teams ensure regulatory compliance, avoid massive fines and mitigate reputational damage.

The new technology also helps organisations to manage personal identifiable information (PII) and Subject Access Requests (SARs).

Within the European Union, individuals already have the right to make SARs and they can ask an organisation to deliver all of the personal data that the organisation holds about them.

In addition, individuals can request the purposes for which that data is being processed and which organizations receive it.

These requests will soon become of global significance as the forthcoming General Data Protection Regulation (GDPR) enhances data subjects' rights over personal data and will require that organisations adhere to a month time limit on SAR responses.

However, meeting this time frame may be difficult, as many organisations have limited visibility into what data they have and where it is located.

According to Veritas research, data continues to grow at an annual rate of 49 percent globally, and as a result, organisations are storing more data on-premises and in one or more clouds.

Because of this fragmentation, many organisations have limited visibility into what data they have and where it is located, so finding relevant personal data in a timely fashion becomes a significant challenge.

The latest version of ediscovery Platform includes a new set of review and redaction tools that allow for smarter and faster review.

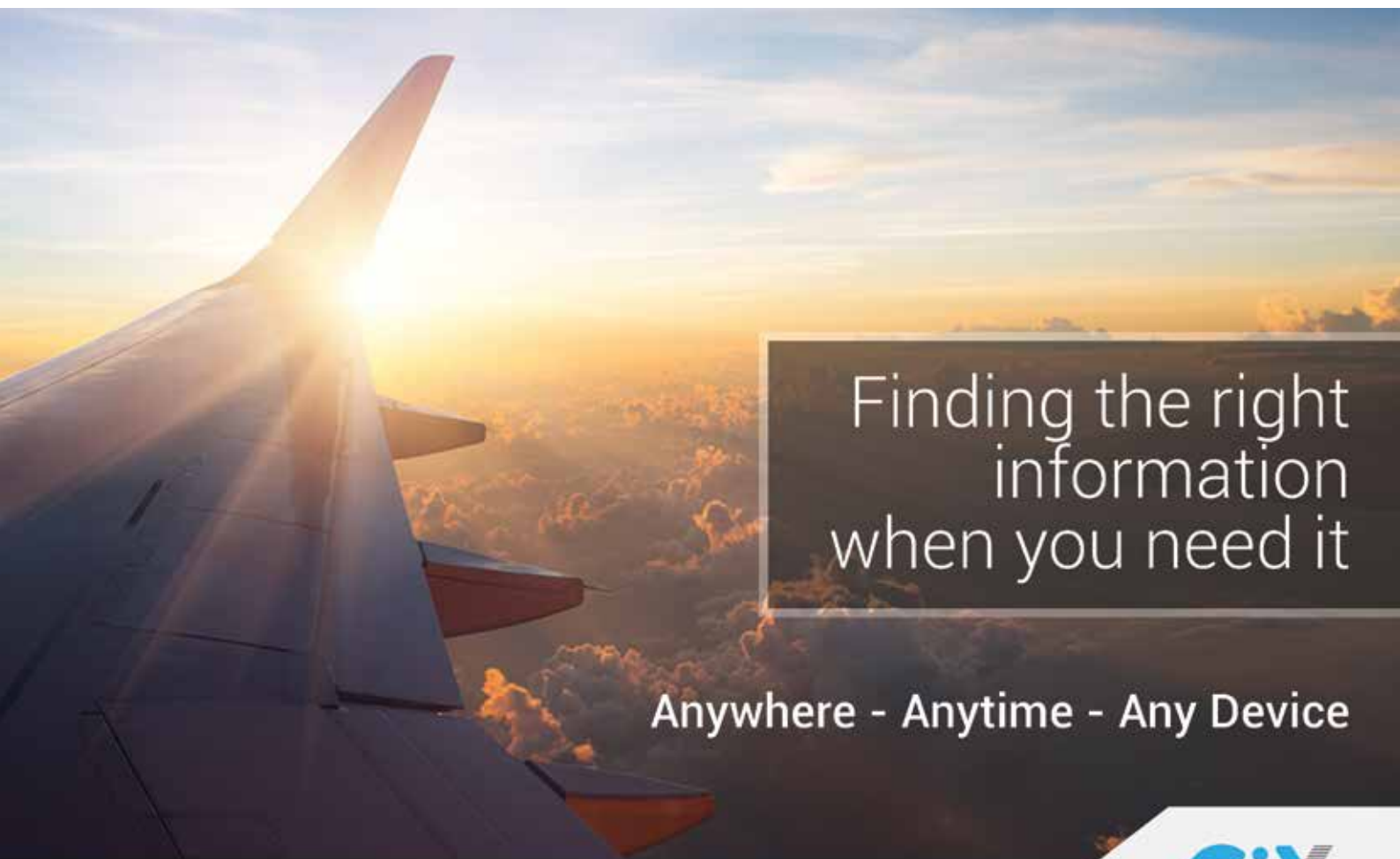
Bulk Redaction is a new feature that can automatically comb through a data set and mask all sensitive data in categories pre-determined by the reviewer across the entire corpus in one single motion.

This capability helps organisations to ensure that they are not accidentally leaking risky data that should have been withheld (such as personal data relating to another individual) when responding to a SAR.

Additionally, the ediscovery Platform now includes pre-set redaction codes to ensure consistency throughout the document review process and to enable users to demonstrate to individuals why particular data items were withheld.

This release also includes new annotation capabilities that simplify how case handlers mark-up review documents and share notes with each other to better support collaborative workflows for data sets that require multiple reviewers.

For more information on the Veritas eDiscovery Platform, visit <https://www.veritas.com/product/information-governance/ediscovery-platform>.



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NZ Commerce Commission/SFO invest in Relativity eDiscovery software

The New Zealand Commerce Commission and Serious Fraud Office (SFO) have recently invested in Relativity as their preferred eDiscovery solution. Relativity is widely regarded as one of the leading eDiscovery software solution internationally, with nearly 14,000 organisations using Relativity in over 40 countries, totalling over 165,000 users. Relativity has over 800 employees, with more than 350 deployed in the engineering team to manage and develop the product further.

The advanced features will help both organisations reduce inefficient manual processes, enabling them to manage larger data volumes and get to the facts quicker.

Relativity provides the Commerce Commission and SFO greater capability to analyse and interrogate evidence to help them manage their investigations. Both organisations now have access to the latest eDiscovery functionality, from email threading, conceptual searching through to technology assisted review.

Those that work with or against the Commerce Commission or SFO, should be on notice that both organisations now have the tools at their disposal to help them more effectively manage evidence in their investigations. Law firms and other organisations will need to ensure that they also have access to effective tools.

Both the Commerce Commission and SFO have invested in 'on-premise' instances of Relativity, which is the first 'on-premise' instances of Relativity deployment in New Zealand.

The 'on-premise' instance allows both organisations to perform all their eDiscovery requirements in the one system, whilst administering internally. This provides them with the ability to fix cost around the software, whilst reducing reliance on 3rd parties.

However, the managed service option may be more applicable for New Zealand firms, rather than running infrastructure internally.

Those without the budgets of the Commerce Commission and SFO to invest in Relativity internally, can access Relativity on a matter by matter basis – in a 'pay as you go' type model. This allows access to the technology, without having to make the investment in-house. Relativity is available through 10 hosting partners in the New Zealand and Australian market.

Relativity has been used by a number of New Zealand law firms for many years, with it being one of the leading options that I have used for the best part of 10 years with many different clients.

Tighter links to Critical Business Apps in latest release of FileBound

Upland Software has announced a new release for its FileBound workflow automation solution. The latest release focuses on content availability, performance and reliability, security, and enhances the day-to-day interaction between FileBound and an organisation's everyday line-of-business applications.

The latest release features innovative technology that bridges the FileBound platform to a company's critical business applications, such as Salesforce CRM, Microsoft Dynamics GP, and Skyward School Management Software.

The new capability provides FileBound administrators with more control over notifications and exports through process and data collection improvements.

FileBound Connect anticipates and intelligently delivers content relevant to your needs, eliminating the tedious process of searching to retrieve related content. It's clean design and out-of-the box integrations transform the way you connect to your everyday line of business applications.

- **Content Delivery:** Manual searching is a thing of the past. Connect anticipates the content you need based on the business

applications (e.g. ERPs, CRMs, accounting systems, etc.) you work with and automatically delivers it straight to your fingertips.

- **Instant Notifications:** Users are alerted of assignments the moment they are received. Just one-click and the user is already moving the task through the approval process.
- **Drag and Drop:** Add content to FileBound simply by dropping it into the file – Connect does the rest.

Key benefits of this release include:

- **Enhanced business automation** by transforming traditional PDFs into clickable, html-based forms in seconds
- **More efficient routing of workflow assignments** by collecting pertinent details via online, fillable forms with conditional capabilities
- **Improved flexibility and enforcement of security and content control** through more granular security and permission controls.
- **Improved user adoption and understanding** across the organisation via context-sensitive help documentation

"Customer feedback is at the heart of the Upland customer experience, which is why we were committed to improving customer efficiency and productivity in this latest FileBound release," said Sean Nathaniel, CTO and SVP of Workflow Automation Solutions at Upland Software.

"By helping organizations eliminate their PDF chaos and empowering employees to quickly and easily access relevant content and data stored in FileBound, users are able to make intelligent business decisions and boost productivity."

FileBound's suite of robust controls continue to expand, while offering more granular configurations:

- **Group Administrator:** The Group Administrator controls accessibility and settings for a Group. This addition completes the Administration suite of permissioning levels to ensure users have the tools needed to be compliant with security and access audits.
- **Metadata Auditing:** Index level auditing monitors any edits to an index field and tracks the user who made the change, as well as, the change and the previous and resulting values.
- **Locking Rights:** FileBound has expanded its locking capabilities to files and metadata while also allowing administrators to grant these rights to specific groups and users.
- **Most and Least Restrictive Group Settings:** Misconfigurations sometimes lead to conflicting rights or permissions for users. FileBound takes the guesswork out of aligning these settings as administrators are able to set their system to enforce group security from a most restrictive or least restrictive standing, providing users the access they need while still adhering to comprehensive security and audit processes.

For more information on this release, visit <http://info.uplandsoftware.com/filebound-v7.4release.html> or request a demo here: <https://uplandsoftware.com/filebound/demo-request/>

M-Files Opens Office in Australia

ECM vendor M-Files Corporation has announced the opening of its new office in Sydney, Australia. The company increasing its workforce and sales and marketing investment in Australia and New Zealand (ANZ) to expand its partner network and support its growing customer base in the region.

M-Files says its expansion comes as an increasing number of businesses are making information management a strategic priority, which is driving them to look for alternatives to their existing enterprise content management (ECM) and document management systems that have proven to be complex and difficult to use.

Nicholas Delavaris, alliance and partner manager for Australia and New Zealand, said, "The opening of our office in Australia will enable us to accelerate our efforts to bring the value of this approach to companies in this region."

Bot traffic is taking over the Web



Bots conduct more than half (52 percent) of all Internet traffic flow today, and for some organizations they represent more than 75 percent of their total traffic, according to a report from the Ponemon Institute sponsored by cyber security vendor Radware.

This is a significant finding, the study said, considering that one third of organizations can't distinguish between "good" bots and "bad" ones.

The report, based on a global survey of more than 600 security executives from the retail, healthcare, and financial services sectors, found that nearly half (45 percent) of respondents had experienced a data breach in the last year.

More than two thirds (68 percent) are not confident they can keep corporate information safe. In addition, companies often leave sensitive data under-protected. More than half (52 percent) do not inspect the traffic they transfer to-and-from APIs, and 56 percent do not have the ability to track data once it leaves the company.

"It's alarming that executives at organizations with sensitive data from millions of consumers collectively don't feel confident in their security," said Carl Herberger, Vice President of Security Solutions at Radware.

"They know the risks, but blind spots continue to pose a threat. Until companies get a handle on where their vulnerabilities are and take steps to protect them, major attacks and data breaches will continue to make headlines."

Key survey findings include:

Application security is an afterthought

Everyone wants the full automation and agility that the continuous delivery model of app development provides. Half (49%) of the respondents currently use the continuous delivery of application services and another 21% plan to adopt it within the next 12-24 months. However, continuous delivery can compound the security challenges of app development: 62% reckon it increases the attack surface and approximately half say that they do not integrate security into their continuous delivery process.

Bots are taking over

Bots are the backbone of online retail today. Retailers use bots for price aggregation sites, electronic couponing, chatbots, and more. In fact, 41% of retailers reported that more than 75% of their traffic comes from bots, yet 40% still cannot distinguish between "good" and "bad" bots.

Malicious bots are a real risk. Web scraping attacks plague retailers by stealing intellectual property, undercutting prices, holding mass inventory in limbo, and buying out inventory to

resell goods through unauthorized channels at markup. But bots are not the exclusive problem of retailers. In healthcare, where 42% of traffic is from bots, only 20% of IT security execs were certain they could identify the "bad" ones.

API security is often overlooked

Some 60% of organizations both share and consume data via APIs, including personally identifiable information, usernames/passwords, payment details, medical records, etc. Yet 52% don't inspect the data that is being transferred back and forth via their APIs, and 51% don't perform any security audits or analyse API vulnerabilities prior to integration.

Holidays are high risk for retailers

Retailers face two distinct but highly damaging threats during the holidays: outages and data breaches. Web outages during the holiday season, when retailers make most of their profits, could have disastrous financial consequences. Yet more than half (53%) are not confident in their ability to provide 100% uptime of their application services. High-demand periods like Black Friday and Cyber Monday also spell trouble for customer data: 30% of retailers suggest they lack the ability to secure sensitive data during these periods.

Patient healthcare data is at risk

Just 27% of healthcare respondents have confidence they could safeguard patients' medical records, even though nearly 80% are required to comply with government regulations. Patching systems is critical to an organization's security and its ability to mitigate today's leading threats, but some 62% of healthcare respondents have little or no confidence in their organization's ability to rapidly adopt security patches and updates without compromising operations.

More than half (55%) of healthcare organizations said they had no way to track data shared with a third party after it left the corporate network. Healthcare organizations are particularly unlikely to monitor the dark net for stolen data, with 37% saying they did so, compared to 56% in financial services, and 48% in retail.

Multiple touchpoints equal higher risk

The rise of new financial technology (like mobile payments) has increased the access and volume of engagement with consumers, which, in turn, increases the number of access points with vulnerabilities and expands the risk security executives face. While 72% of financial services organizations share usernames and passwords and 58% share payment details via APIs, 51% do not encrypt that traffic, potentially exposing valuable customer data in transit.

Why Records Management and Ediscovery Are Adopting Content Federations



By Marko Sillanpaa

According to AIIM, most organisations have three or more repositories for their enterprise content, but the content in one repository rarely works together with content in another. In the off chance it does work together, it is usually through SharePoint with an enterprise content management (ECM) or a content services platform.

Last year, the concept of content federation gained more attention as the spotlight on content services intensified. The idea here is to allow access to content stored in several isolated repositories across an organisation as if it was in one repository.

Since this content is usually associated with business processes, most organisations don't see federations as a current need. However, there are solutions inside most organisations that use some federation capabilities.

They either bring content together into yet another repository or they loosely connect to content in an isolated repository. The two most prevalent use cases are in records management and e-discovery.

Content Federation Is Records Management

Records management is one space where we see organisations adopting content federations. A traditional records management approach stores those documents in their own repository.

If that repository is a records repository, then the content is copied or moved into the records repository. If that repository is a working repository, then the retention policies must be copied into every repository used by the organisation.

Organisations following this traditional approach will end up with duplicate content and have problems keeping retention file plans in sync across multiple repositories.

Using content federations eliminates both challenges. By having the records system link to the content at its source, the federation eliminates the need for duplicates.

The bidirectional capability of federations means that the

documents can be locked down at their source and marked as a record. All of this is done from a single master repository and eliminates the need to duplicate file plans across repositories.

Content Federation Is Ediscovery

Ediscovery is another place we see changes taking place using content federations. Today, the ediscovery process starts by identifying content related to a legal or regulatory matter by searching all repositories for potentially relevant content. These documents are copied into the ediscovery system where their relevance is assessed.

In most cases, the copy relevant to the matter is maintained by the ediscovery system. Any holds on those documents in the source repository are addressed by manual or disconnected processes.

With a federated content approach, the ediscovery process could use links to the content in the source repository. Not only does this eliminate the duplicate content of the copy, but it can also address the process of placing the record on hold in the source system.

It also offers the ability to remember the document's relative nature to the matter. Therefore, future discovery efforts could take advantage of prior assessments. This could shorten the time needed to evaluate new collection in future events.

Content Federation Elsewhere

Content federations will continue to grow inside an organisation in the coming years. It will not only continue to address content challenges that cross departments but will also create new opportunities to use content across the enterprise. How will your organisation use content federations in the coming year?

Marko Sillanpaa is co-founder of the blog Big Men On Content and the founder of BMO Consulting. He has been working in ECM for over 18 years for vendors like Documentum, EMC, Hyland, and SDL Trados and systems integrators like CSC and Accenture. Follow him on Twitter @MSillanpaaBMOOC.

Sony Develops System for Education Using Blockchain

Sony Corporation and Sony Global Education (SGE) have developed a system that will apply block chain technology to the field of education, centralising the management of data from multiple educational institutions and making it possible to record and reference educational data and digital transcripts.

The newly developed system comes with functionality that records information in a difficult to falsify way and controls access to recorded information, making it possible to reliably disclose information to authorised third parties.

Sony Global Education will build on this system to construct a foundation for new educational and learning services where multiple educational institutions will be able to make use of its data. This system is built on IBM Blockchain, which is delivered via the IBM Cloud and powered by Hyperledger Fabric 1.0, a blockchain framework and one of the Hyperledger projects hosted by The Linux Foundation. It brings together 1) a function that authenticates and controls usage rights to educational data, and 2) an application programming interface for handling these rights aimed at educational institutions.

Currently, in educational institutions that operate ICT systems, operational management is carried out by "Student information system" comprised of students' school registrations, attendance, grades, and educators' lesson planning management, and "learning systems" made up of all educational

content as well as students' learning records, results, etc.

By using the newly developed system, operators can safely integrate and connect previously gathered data as is from "Student information systems" and "learning systems," even if that data came from different providers.

At the same time, with this new system's services, users can take data about school grades and educational records, create a digital transcript, and safely provide it to a different educational institution. Additionally, this also makes it possible for evaluating organisations to analyse this data and records using artificial intelligence (AI) and use it to provide suggested improvements to educational institutions' curricula and management.

This newly developed system is also extremely versatile, with the potential for wider applications outside of the field of education including device control and data management in the IoT field, contract management of value chains in the field of logistics and distribution, rights and distribution management in the digital contents field, property rights and usage management in the sharing economy, and currency/point tracking in the field of cryptocurrencies.

SGE's believes that blockchain technology will be a big influence on the future of society, and that by linking together the systems of various educational institutions via this newly developed system, it can create a new framework for education.



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14 signs that you need help with Data Capture and Reconciliation and where to start

Data capture and reconciliation at first touch point is one of the most effective ways to improve business operations and processes. It is a way to eliminate or minimize paper handling, initiate or trigger workflows for action sooner, efficiently use auto-classification tools, automatically start information governance controls, and immediately match information to ensure that only accurate data enters the corporate systems.

But, despite businesses understand this question, there's still a lot to be done. In a recent study by AIIM and Papersoft, when asked about their progress in moving capture and reconciliation to first touch point, only thirty-one percent of respondents report they have actively been able to move their functions.

Given that capture and reconciliation have been around for several decades, it is disappointing that we have not been able to achieve higher levels with only six percent reporting they have reached a saturation level, but the fact businesses are still moving capture to the front of the processes is encouraging.

The fact is that automated Data Capture and Reconciliation brings vital business information into the information ecosystem quickly, making it secure, accessible, and available to transact business immediately.

How is all of this in your organisation? If you have the following pains, it's time to invest in Data Capture and Reconciliation to eliminate them.

Here are the 14 signs that you need help with Data Capture and Reconciliation

- You have different layouts matched to different document types in any step of the workflow
- Technology isn't capable or flexible enough to ensure that only accurate and valid data is integrated into core systems
- Things are somewhat ad-hoc and you struggle to match up paper and electronic
- Electronic inbound tends to be printed and then filed/processed alongside paper
- You need to improve process productivity by removing manual steps, bottlenecks, and overloads
- Business insights are difficult to gather and you can't see the whole processing scenario from report to the end of the cycle
- Your business processes are inflexible with the new regulatory requirements
- Enterprise search takes too much time and delays order to cash service
- Adding value to legacy content is not as simple as it should be
- You can't detect in realtime business alerts such as fraud, crime, policy infringement, unacceptable use, etc.
- Improving the benefits/compliance of our ECM/RM – staff are poor at classification
- Workers need to check multiple not synchronised systems for business decisions
- You have to deal with frequent customer complaints
- Inability to create new online products

So, how can a Data Capture and Reconciliation solution help you address these challenges? With these two simple actions:

- The full automation of the reconciliation processes, both from paper or digital origin. Capture in papers, email, fax, files, apps, and others; Reconciliation of names, addresses, claims, contracts, invoices, and others. The correct data immediately delivered in existing systems



- Critical processes management right at the entry point – increasing the productivity of operational teams, reducing cost, and ensuring information quality.

So what does a Data Capture and Reconciliation solution look like?

A database matching and validation platform enables you to automatically perform the following tasks:

Quality Control & adaptive classification technology: system self-learns updating the project and fixing the issue. Automate governance tasks that will lead to future retention schedules

Metadata Extraction & Business Rules (OCR/ICR/IDR): Fields are captured using an extraction module. Using business rules, information consistency is matched with other documents from the process or system feeds, automating the human validation control checks

External Knowledge Validations: Database reconciliation comparing information such as names, address, bank details, customer number and order number with the master data (txt/csv/customer databases). It's also possible to match information through customer webservices from ERP, CRM, AML/KYC or legacy systems.

BPM Client Exception Handling (Web Browser) : Business conclusions are flagged and all mismatched items are grouped by case for client validation. The exceptions can be categorised by type on a dashboard:

Rejection process – A template email can be created with all mismatch reasons and shared with a contact.

Acceptance process – The user is able to edit information for a specific item and update the input before submission to the customer system.

Not only does this service ensure the accuracy and validity of information of any type (not only financial), it also grants that unauthorized or illegal changes have not occurred to transactions during processing.

If uncertain of where to begin or how to begin, seek professional assistance and/or training to help determine the right path. It is better to take a step forward and learn than to take no step and fall behind.



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- 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.

Kapish

Tel: (03) 9017 4943

Email: info@kapish.com.au

Web: <http://kapish.com.au/>



Kapish is a member of the Citadel Group (ASX: CGL).

Citadel solve complex problems and lower risk to our clients through our tailored advisory, implementation and managed services capabilities.

With over 250 staff nationwide and an ability to 'reach back' and draw on the expertise of over 1,500 people, we are specialists at integrating know-how, systems and people to provide information securely on an anywhere-anytime-any device basis. Servicing both large and small, public and private sector organisations across all industries, our team of highly qualified staff have global experience working with all versions of Micro Focus Content Manager (CM).

It is this experience coupled with our extensive range of software solutions that enable our customers and their projects to be delivered faster, more cost effectively and with more success. At Kapish we are passionate about all things Content Manager. As a Tier 1, Micro Focus Platinum Business Partner, we aim to provide our customers with the best software, services and support for all versions of the Electronic Document and Records Management System, Content Manager.

Quite simply, our products for CM make recordkeeping a breeze. Kapish was recently awarded the HPE Information Management & Governance – Partner of the Year 2017 award. The award reflects the growing success of Kapish in the IM&G space, highlighted with promotion to Platinum Partner status in 2016.

EzeScan

Phone: 1300 393 722

Fax: (07) 3117 9471

Email: sales@ezescan.com.au

Web: www.ezescan.com.au



EzeScan is one of Australia's most popular production capture applications and software of choice for many Records and Information Managers.

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

Solutions range from centralised production records capture, highly automated forms and invoice processing to decentralised enterprise digitisation platforms which uniquely align business processes with digitisation standards, compliance and governance requirements.

With advanced indexing functionality and native integration with many ECM/EDRMS, EzeScan delivers a fast, cost effective method to transform your manual business processes to highly intelligent digital workflows.

EzeScan benefits include:

- initiate intelligent automated processes;
- accelerate document delivery;
- minimise manual document handling;
- capture critical information on-the-fly; and
- ensure governance, regulatory and digitisation standards compliance.

OPEX

Contact: Byron Knowles, Business Development Manager - APAC

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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

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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.

Objective

Phone: 1800 065 640

Email: enquiries@objective.com

Web: www.objective.com



Designed for government and regulated industries, Objective's solutions extend governance across the digital workplace; enabling information, processes and collaboration that support modern business.

Objective's core software is a suite of applications with built-in information governance, including: document management, records management, drawings and plan management, digital redaction, reporting insights, workflow, enterprise content management, collaborative authoring and secure collaboration with external parties.

Objective's industry solutions bundle selected content services to address specific business challenges. Based on extensive customer experience and industry best-practice, they are pre-configured to fast-track implementation and realise benefits sooner. These solutions integrate with existing information management platforms such as Micro Focus Content Manager, SharePoint, TechOne ECM and Objective ECM.

Solutions include:

- For state and federal government: Ministerial correspondence; Parliamentary briefs; Cabinet papers; Freedom of Information.
- For local government: Licenses and permits; Building and development assessments.
- For health services: Provider contracts and invoicing; Patient referrals.
- For financial services: Product disclosure statements.

How a NASA Facility is Digitising over 90,000 Planetary Mission Images



The University of Arizona is using Matrox Imaging OCR software to read text-field data from Surveyor missions in the 1960s in record time and with perfect accuracy

The University of Arizona's Lunar and Planetary Laboratory (LPL) is home to the Space Imagery Center, a NASA Regional Planetary Image Facility. Founded in 1960, LPL was one of the few places engaged in studies of the solar system at that time.

In 2015, NASA partnered with the University of Arizona, providing funding to digitise the film images and data from the Surveyor moon landers that have been in storage since the 1960s. The goal is to create an archive for inclusion in the NASA Planetary Data System (PDS), a collection of data products from NASA planetary missions.

As John Anderson, senior media technician at LPL, describes it, his "focus and primary area of responsibility is the digital recording of the images, extracting and decoding the encoded image data optically recorded on each film frame, and processing the pictures for viewing in a digital format."

Raw materials

Between 1966 and 1968, the five successful Surveyor missions returned over 92,000 individual images of the moon's surface. Film images were created by focusing a 70 mm film camera at a precision CRT display monitor and photographed onto special recording film.

In the 50 years since, the computer files and video tape records have long disappeared or become obsolete - the only existing copies of the images are the film rolls.

Many frames from the Surveyor missions had seemingly legible

text, which the operators initially thought could easily be read by conventional optical character recognition (OCR) software. They soon discovered that the characters in the text were a dot matrix similar to old printers using a 7x9 teletype-style character, making it a challenge to find an OCR software capable of accurately reading the text fields. A comprehensive OCR solution was needed.

A stellar solution

This is where Matrox comes in. Anderson notes, "Lorne Trottier, co-owner of Matrox, saw an article in Planetary Report about the NASA PDS project. He reached out to the university through Arnaud Lina, director of research and innovation at Matrox Imaging, offering assistance using Matrox's OCR software to read LPL's text information. [LPL] selected some cropped images to upload for a test and the results were amazing. It was very encouraging, especially with the failure of other OCR products to read the human readable text (HRT)."

Mission control

The overall project involves creating a searchable archive that will outlast conventional physical media repositories. Given the possible long-term reference potential of the images and data, there is need for careful and accurate treatment of the resources.

The workflow comprised an image scanning system from Stokes Imaging. The Stokes Imaging System captured between four and eight frames per minute as high-resolution TIFF images. At the conclusion of the scanning phase, LPL found themselves with over 92,000 individual images.

Operator interaction was intensive during the original scanning

process. While the Stokes Imaging System was automated, the film itself was not uniform in spacing, indexing, exposure, or processing.

Once scanned, Adobe Photoshop and MATLAB software were used to pick out the details and create large composite mosaics from the image files. The process also required manual error checking since the decoding of the dot-field data relied on calibration lookup tables created from the original 1966 pre-launch test data.

We have liftoff

The project began in February 2015 with the assembly of the Stokes system, and continues to process, catalogue, and data-mine the information contained within the images.

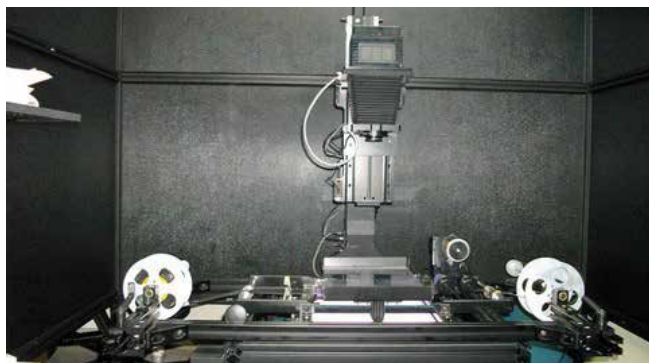
Even though there are sprocket perforations on the film stock, the original recording transport was sprocket-less, resulting in inconsistent frame spacing as well as frames drifting with respect to the edge perforations. The team at LPL were unable to determine a consistent film advance, and with each new roll of film, the spacing of the frames and lateral positioning of the image shifted. This resulted in overall images with text in different places, as well as some images tainted with artifacts. Moreover, the data fields have HRT with varying number of characters.

Matrox's solution - based on one of its efficient and accurate OCR software tool - beautifully addressed the problem of reading dot matrix characters, and reduced the time expenditure to a few minutes per roll.

The initial review of the Matrox OCR solution showed an almost perfect read from nearly 4,500 different image files. For example, for roll 1 of Mission 5, the Matrox OCR solution scanned 846 files, reading 15,191 individual fields for a staggering 99.77% accuracy. Rolls 2 and 9 of Mission 5, were even better, yielding respective 99.92% and 100% accuracy rates.

Looking to the future

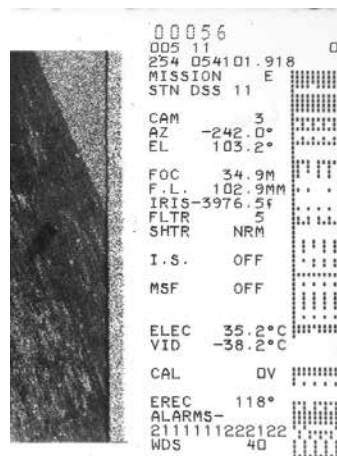
The University of Arizona Lunar and Planetary Laboratory Space Imagery Center, a NASA Regional Planetary Image Facility, serves as the repository for many images and resources from all NASA missions. To date, the Matrox software has helped tackle data from Surveyor 5, and will prove a valuable tool during the catalogue and error check of data from Surveyor 6 and 7, along with other mission materials from NASA projects and explorations. The Matrox OCR software has been an instrumental addition to the archiving project. Continued use of the system will accelerate the recording of text information from the Surveyor image files, enhance the accuracy of the metadata, and streamline what can be a very labour intensive and tedious task. Anderson notes, "Compared with accuracy rates of 75% to 85% achieved with the original approach, there is no doubt as to the better result. Our project has been greatly enhanced and the progress of reading and cataloguing the data with high accuracy would not have been possible without the gracious assistance of the Matrox team."



The Stokes Imager used to digitise the image frames from the Surveyor missions.



Typical film image from Surveyor mission, with a CRT display (left) and associated data fields (right).



Example of mission data fields to be read; note the dot-matrix nature of the text.



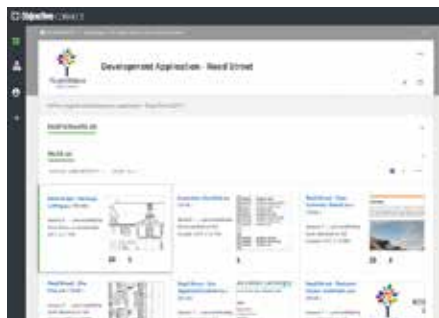
Another example of a Surveyor mission film image captured by a 70-mm film camera and photographed onto special recording film.



The dot-matrix characters in the data field posed a challenge to be read.

The next generation of secure external collaboration with Objective Connect

By Anna Pelesikoti, Objective



As a software company, there's nothing better than knowing you're solving customer problems with a new software release. When it comes to building software, it's easy to fall into a trap of creating new features that, while nice, make little-to-no difference to the end user. At Objective, we're in the business of helping our customers transform their worlds by giving them tools to make their business processes easier, faster, simpler, more reliable and safe.

You may have heard that we're on the verge of releasing a major update for Objective Connect. Around the office we're referring to this release as 'next gen'. Our message to the market is that this is the next generation of secure external collaboration.

We've been on the road and online talking to our customers about the next gen release and what's in store. The reaction we've received from customers has buoyed our excitement to the next level.

Hearing comments like, "this is exactly what we've been asking for", has reinforced for me what I already knew: our customers spoke, we listened, and we are delivering an awesome update that is giving them what they told us they wanted. It's that simple.

The innovations we've made in Objective Connect will enable you and your teams to do more with external parties. Starting with the new Objective Design Language, or ODL.

If ODL sounds familiar, that's because it is – it's the common user interface that is deployed across the Objective family of solutions. ODL has been applied to Connect, making it faster to navigate and simpler to understand key features.

Beyond a new look and feel the next generation updates make it easier to locate content. All Office documents, PDFs and Image files saved to Connect, will now be identifiable by a thumbnail image.

Similarly, we are adding the ability to view Office documents, including Word, Excel and PowerPoint in the browser, removing the need to download; something you can do today with PDF and Image files.

Not all collaboration is two-way. This is what I was referring to earlier with regards to us really taking on feedback from our users.

Within our customer base, we know that there are multiple use-cases requiring organisations to share content but restrict the ability to download local copies.

As such we will be adding a new ability that only allows Participants to Preview documents in the browser and never download a local copy. We will even add a watermark for added security.

Want to get involved early? You can! We're about to move into preview mode, where we are inviting a small number of our customers to participate.

This will unlock early access to some of the features I've

described above. The benefits of jumping on the preview are to get your organisation a head start on the main roll out and to pilot the product. You can choose who is involved – some or all of your users and you can go back to the existing interface at any time.

To be a part of the preview, email us at connect@objective.com

Ediscovery software to identify wrongful conviction trends

The American Bar Association (ABA) is undertaking a project to use Relativity ediscovery software to analyse data on cases to determine whether bias or other factors could have contributed to wrongful convictions.

Known as DFENDER, an acronym for Distributed Forensic Expert Network Delegating Review, the project has these three goals:

- To collect data and identify the key factors contributing to wrongful convictions based on forensic science.
- To improve the review process for wrongful convictions with the help of e-discovery technology. Relativity's e-discovery platform will be used to bring together the work of a network of legal and forensic experts.
- To develop a talent pipeline by giving law and forensic science students real-world experience.

According to the National Registry of Exonerations, there were 168 people vindicated after being wrongly convicted of crimes in 2016.

As its first focus, the DFENDER Project is looking to define the relationship between cognitive biases and two of the most common forensic techniques which produce invalidated or improper evidence: microscopic hair analysis and arson investigation.

One of the recent reports published by the FBI, the National Association of Criminal Defense Lawyers (NACDL), and the Innocence Project concluded that FBI testimony on microscopic hair analysis contained testimonial errors in more than 90% of cases in an ongoing review. Using Relativity will allow the team to break the workflow into components, match those components with corresponding experts, and facilitate the review and analysis of case documents, including identifying cognitive bias and trends related to wrongful convictions. Equipped with advanced analytics and powerful visualizations, Relativity will also allow the DFENDER Project to follow an investigative pattern of thought and make data-driven decisions around potential cases of wrongful conviction.

"With Relativity and a growing network of legal and forensic experts, the DFENDER Project should be better equipped to accelerate the review of wrongful convictions around the country," said Bryan Wilson, head of the DFENDER Project and a fellow at the ABA Center for Innovation.

"We're looking forward to setting an example of how the legal community can use technology to fight injustices caused by incorrect assumptions about human behaviour."

Relativity provided the DFENDER Project with access to its e-discovery technology through the company's Academic Partner program, an educational initiative that equips law schools and paralegal programs with free access to hands-on training in Relativity and helps prepare students for future roles in the field.

Foxit ups accessibility in PDF Compressor

Foxit Software has announced the latest release of PDF Compressor, which has been enhanced to make scanned documents more accessible for people with disabilities using assistive technology. PDF Compressor now features automatic tag generation that improves the ability of screen readers to understand document content.

PDF Compressor helps organisations convert documents from paper to digital formats. During this process, the software automatically generates tags that enable screen readers to identify content and order better.

PDF Compressor will, for example, tag artefacts such as headers and footers that get repeated on every page, eliminating them from being read repeatedly, improving the listening experience. Another example of PDF Compressor's effectiveness is its ability to identify multiple columns to inform screen readers of the correct reading order of content.

Key new features of PDF Compressor include:

- Eliminates cost and time intensive manual work identifying and tagging document structures which could, for a typically-sized document, equate to hours saved
- Improves conversion of scanned documents into highly compressed PDF/A files
- Recognises document structure and assigns appropriate tags during the text recognition process
- Identifies headers, tables, images and their signatures in scanned documents allowing them to be differentiated from the general body text.

<https://www.foxitsoftware.com/products/pdf-compressor/>

Kofax introduces advanced Invoice Processing solution

Kofax has launched a new advanced invoice processing solution based on its TotalAgility platform, dubbed IP Agility, which automates the receipt of invoices already in an electronic format, paper invoice scanning, classification, data extraction, perfection and export to ERP and accounting systems.

"Leveraging our leading financial process automation expertise and TotalAgility platform for digital transformation, we've created an innovative solution that eliminates inefficiencies in invoice processing," said Reynolds C. Bish, Chief Executive Officer of Kofax.

"IP Agility promotes rapid time to value, and helps redefine the experience, delivering dramatic improvements in productivity while reducing costs."

IP Agility offers:

- Data validation and automatic purchase order (PO) line item matching - Data validation is enhanced by fuzzy logic, improving extraction results and automating more accurate PO line item matching.
- Support for global organizations - Global organizations and shared services centres can process invoices from many countries and in different currencies using a single instance of IP Agility, and configure the solution by individual business unit with multi-lingual support.
- Automatic receipt of any type of invoice - Invoices are processed automatically regardless of how they are received – by email, fax, paper, PDF files or xml.
- Highly scalable solution - IP Agility is highly configurable, addressing the most complex, high volume invoice capture and processing requirements.
- Business system integration - IP Agility easily interfaces with most ERP and accounting systems, including SAP and Oracle E-Business Suite.

Law Firm tackles Document Metadata

Canadian-based insurance litigation firm, Hughes Amys LLP, has replaced an outdated metadata solution with BigHand Scrub following a firm-wide Microsoft Office upgrade.

Sean Farrell, the firm's Network Administrator comments:

"Managing our clients' document metadata is of the utmost importance to ensure integrity of data and confidentiality. It's

also important, as one of Canada's leading Insurance law firms, that we safeguard the firm's reputation.

"When we learned that our previous metadata solution wasn't compatible with Microsoft Office 2013 or later, we started looking for an alternative before completing the upgrade."

<http://www.bighand.com>

Esker adds ISO 27001:2013 Certification

Esker, a worldwide leader in document process automation solutions and pioneer in cloud computing, today announced that it received ISO 27001:2013 (ISO 27001) certification for its Information Security Management System (ISMS) by A-lign, an independent, third-party auditor. ISO 27001 is the internationally recognized standard for certifying that a company's ISMS protects its data and that of its customers.

This certification demonstrates that Esker has implemented security measures and countermeasures that protect it from unauthorised access or compromise, that the security of data has been addressed, implemented and properly controlled in all areas of the organization. Also that IT personnel were found to be conscientious and knowledgeable in best practices.

ISO 27001 is invaluable for monitoring, reviewing, maintaining and improving a company's ISMS. Accredited certification to ISO 27001 demonstrates to existing and potential customers that an organisation has defined and put in place best-practice information security processes and that all internal data and data submitted by customers and suppliers are handled in a secured way.

The benefits of information security, particularly the implementation of ISO 27001, gives partner organizations and customers greater confidence in the way they interact with a business. Benefits to customers are numerous, including:

- Security risks are appropriately prioritised and cost-effectively managed
- Security best practices are in place along with a managed approach to business information protection including risk, governance and compliance
- Defined framework to ensure fulfillment of commercial, contractual and legal responsibilities

"This certification confirms our continued commitment to information security at every level," said Jean-Michel Bérard, CEO at Esker.

<https://www.esker.com/business-process-solutions/>

Accusoft adds document comparison and image tools

Development tool vendor Accusoft has announced the release of PrizmDoc v13.0, the newest version of its document viewing and imaging web APIs. The most significant new feature in PrizmDoc v13.0 is document comparison. This allows end users to analyse changes made to the original version of a Microsoft Word document.

The user selects an original file as well as an updated version, and all changes (additions, deletions, etc.) to the original are shown in the newer document and hotlinked for quick access.

Comparison is especially useful for documents such as contract terms and addendums, organisational charts and corporate standards and procedures.

Other advances in image viewing technology include: new gamma adjustment, image sharpening and line thickening tools to enhance viewing of vector-based and pixel-based images, allowing users to produce renderings more refined than ever.

The image enhancement tools are particularly useful for medical, engineering and architectural applications, making online viewing of images such X-rays, blueprints and CAD drawings easier.

ABBYY Real-Time Recognition SDK Adds Instant Data Capture Function

ABBYY has announced the release of the new version of the ABBYY Real-Time Recognition Software Development Kit (RTR SDK) with added data capture functionality on iOS and Android mobile platforms. The Real-Time Recognition technology is capable of pulling text information from on-screen objects and automatically converting it into digital data on the mobile device.

Using the live video stream, the new RTR SDK is able to extract text and data even from complex textures and objects set in natural scenes. Delivering high text conversion accuracy, items converted using ABBYY real-time recognition technology require little to no verification by the user. The 'point and capture' technology enables software developers to build customizable apps that allow users to collect information from documents, objects and complex textures. It works by pointing the smartphone camera to display the text on the preview screen, following which, the data is automatically extracted and processed on the device.

"Our new point-and-capture technology speeds up data acquisition processes, reduces costs by facilitating customer onboarding, and increases customer satisfaction and loyalty by providing users with self-service capabilities," comments Bruce Orcutt, Senior Vice President of Product Marketing at ABBYY.

Easy-to-use data capture-enabled applications can significantly speed up complex registration processes, such as opening an account, applying for a mortgage or loan, or entering a payslip. Instead of filling-in paper forms by hand, which takes time to process and is error-prone, customers can now instantly capture the required data using their mobile handsets. The information is then directly transferred to an online form or custom app for processing. Additionally, the ABBYY Real-Time Recognition SDK provides an intuitive and accurate way to capture codes on loyalty cards, recharge scratch cards and vouchers, or serial numbers on devices, and input the extracted data into the required fields in the app. As no images are sent to the server or stored on the device, the ABBYY Real-Time Recognition technology is well suited for processes that require compliance with security and privacy rules.

Features include:

- Out-of-the-box capture of data from bank cards, IDs, driver's licenses, and passports for a wide range of countries;
- Out-of-the-box capture of International Bank Account Number (IBAN) and information from Machine-Readable Zone (MRZ) on IDs;
- Support of custom data capture using regular expressions
- Recognition and extraction of text of any colour from any background or complex textures

www.abbyy.com/real-time-recognition-sdk

ActivePDF introduces new browser-based PDF Viewer & Editor

ActivePDF has announced the release of a robust browser-based PDF viewer and editor to its family of DocSpace brand products. Reader Plus enables end users to quickly and easily edit and view PDF documents in web applications, accessible through their browser. External applications or plug-ins are not required and content is rendered accurately on-demand, keeping native PDF files secure behind the scenes.

Reader Plus allows users to embed a PDF viewer and editor into most web applications. With Reader Plus technology, users can accomplish a variety of PDF related tasks, including adding annotations, filling form fields, adding security by 'locking down' elements within the PDF file, moving and removing pages, and

more. As a server-based viewer and editor, Reader Plus removes the complexity and cost of client-based solutions.

Organizations retain the PDF behind their firewall to secure the content within the documents, while allowing for personal productivity through authorized viewing and editing. For further security, Reader Plus gives users the ability to disable the print and download option for sensitive files.

"We're excited to introduce DocSpace Reader Plus because it truly is a PDF productivity suite that delivers high performance access to control secured documents," says Tim Sullivan, CEO and Chief Architect at ActivePDF.

"Organizations gain the benefit to customized access controls of documents, while decreasing the client software footprint and costs associated to maintain. This provides teams and end users the ability to collaborate, regardless of where the document is located."

Reader Plus features include:

- Browser-based PDF Viewer & Editor – Compatible with all modern web browsers, Reader Plus makes it easy to extend PDF viewing and editing capabilities to an entire user base, without requiring any client-side installation or maintenance.
- Customizable User Interface – Created by developers for developers, easy customization of the user interface allows to disable features, integrate custom buttons, and more, all through a customized, robust API.
- Secure PDF Documents Behind Firewall – Reader Plus is hosted behind an organization's firewall, protecting confidential documents from unauthorized distribution or tampering. Customization controls prevent users from printing and/or downloading PDF documents, ensuring sensitive data remain securely on the server.

<https://activePDF.com/products/readerplus>

Stop unintentional data breaches

DocsCorp has announced a major update to cleanDocs, its metadata cleaning tool, to provide a platform for data leak prevention. cleanDocs 2.0 combines metadata cleaning and email recipient checking in a single product so users can now be confident that private information is going to the right person and that it contains no harmful metadata.

Data from the ICO shows that 37% of all data breaches reported in 2017 were due to information being sent to the wrong recipient. Implementing systems to prevent data breaches resulting from human error must be a priority for all organisations.

cleanDocs 2.0 recipient checking and metadata cleaning functionalities are crucial for guarding against unintentional breaches and demonstrating Privacy by Design.

cleanDocs 2.0 integrates with Microsoft Outlook to check emails before they are sent externally. In a single step, cleanDocs identifies potential issues within the list of recipients – like public and generic domains – and colour-codes them according to risk level.

On a single screen with minimal clicks and interruptions, the sender confirms that each addressee is an intended recipient before the email is sent. From here the user can clean potentially harmful metadata from attachments, convert them to PDF and compress them to reduce file size.

The ability to do all this in one application is unique to cleanDocs. Organisations have only one Outlook add-in to deploy, which is a boon for Systems Administrators.

cleanDocs 2.0 includes Configuration Manager – a tool that allows Administrators to control all cleanDocs settings and policies. It also includes Zip on Send, so users can compress attachments into a single archive file in Outlook.

To purchase or upgrade to cleanDocs 2.0 contact sales@docscorp.com.

Epson adds new SMB Printers



Epson Australia has announced the new WorkForce and WorkForce Pro series of all-in-one printers that include easy, wireless iPad, iPhone, Android tablet and smartphone printing, as well as Wi-Fi Direct and NFC for network-free printing. All models in the new WorkForce and WorkForce Pro range are powered by PrecisionCore, Epson's next generation technology. PrecisionCore features Epson's advanced thin-film piezoelectric elements, which are produced via a MEMS manufacturing process using semiconductor micro-fabrication techniques. At the core of this proprietary technology is the PrecisionCore MicroTFP print chip that can be arrayed in various printhead configurations. Each nozzle on the printhead delivers up to 50,000 droplets per second for increased precision and print quality.

Some highlights from the new range:

WorkForce Pro WF-3720 – compact, fast all-in-one printer features fast print speeds at 20 ISO ppm (black) and 10 ISO ppm (colour), lower printing costs and a 250-sheet capacity. With a 35-page Auto Document Feeder, auto 2-sided printing, and faxing, and a 2.7" colour touchscreen LCD, the WF-3720 is ideal for home and small offices.

WorkForce Pro WF-4720 – high-speed, all-in-one printer features fast colour print speeds at 20 ISO ppm (black) and 20 ISO ppm (colour), lower printing costs and a 250-sheet capacity. With a 35-page Auto Document Feeder, auto 2-sided printing, and faxing, and a 2.7" colour touchscreen LCD, the WF-4720 is designed for small work teams.

WorkForce Pro WF-4740 – high-speed, heavy-duty all-in-one printer features fast colour print speed at 24 ISO ppm (black) and 22 ISO ppm (colour), lower printing costs and a 500-sheet capacity with two paper trays to accommodate different sizes and media types. With a 50-page Auto Document Feeder, auto 2-sided printing, copying, scanning, and faxing, and a 4.3" colour touchscreen LCD, the WF-4740 is suitable for busy workgroups.

WorkForce WF-7710 – all-in-one printer quickly produces high quality borderless prints up to A3+ (13" x 19") and scans up to A3 (11" x 17"). A versatile inkjet, it features a 250-sheet tray (the WorkForce WF-7720 and WF-7725 feature a 500-sheet capacity), plus a rear feed for specialty paper, adding productivity for any office. It also includes auto 2-sided print, copy, scan and fax, plus a 35-page Auto Document Feeder and you can use the 4.3" colour touchscreen for easy navigation and control.

Pricing and availability: WF-3720 (RRP \$A229), WF-3725 (RRP \$A229), WF-4720 (RRP \$A349), WF-4740 (RRP \$A399), WF-4745 (RRP \$A399), WF-7710 (RRP \$349), WF-7720 (RRP \$A449) and WF-7725 (RRP \$A449) are available now from www.epson.com.au and Epson retailers and resellers across Australia.

We've moved to Office 365. Should we keep our Exchange server?

By Neal Zimmerman

After months of planning, preparation and migration efforts, you have finally moved from your on-premises Exchange 2010+ system to Office 365. Now you are thinking "do we need to keep our Exchange server(s)?" As with most services, the answer is "it depends".

Having personally been involved in the migration to Office 365 for over 200 organisations, this question about decommissioning the on-premises Exchange server has been asked more times than I can count. My standard answer is that there is no right or wrong answer; it is a matter of preference. Here are the reasons why you may want to keep (or retire) your local Exchange server(s) after an Office 365 migration:

1. Local mailboxes are required for security /compliance needs.

Based on your company's needs or compliance requirements, there are certain mailboxes, such as those for finance, accounting or HR, that you may want to maintain on-premises. Keeping your Exchange hybrid environment up and running will allow you to have some mailboxes on-prem and others in the cloud.

2. Application and Device Relays needed

Most organisations have multi-function devices (MFDs) that provide a scan-to-email function for their staff. Additionally, many 3rd party applications require the ability to send email from within the program. While newer MFDs and applications offer this interoperability with MS Office 365, older systems may not support the authentication and/or protocol requirements for sending direct to O365. In these cases, maintaining the Exchange server provides for an on-premises relay to accommodate these legacy systems' send requirements.

3. Public Folder Migration

If you have a lot of public folders (or even a few very large ones) in your Exchange Organisation, there could be a large investment of time, effort and resources to move them to Office 365. Keeping the Public Folders on-premises not only provides additional planning and migration time; but allows you the option to not migrate and just maintain them "as is" while you look to move the data to SharePoint online.

4. Management (And this is the big one)

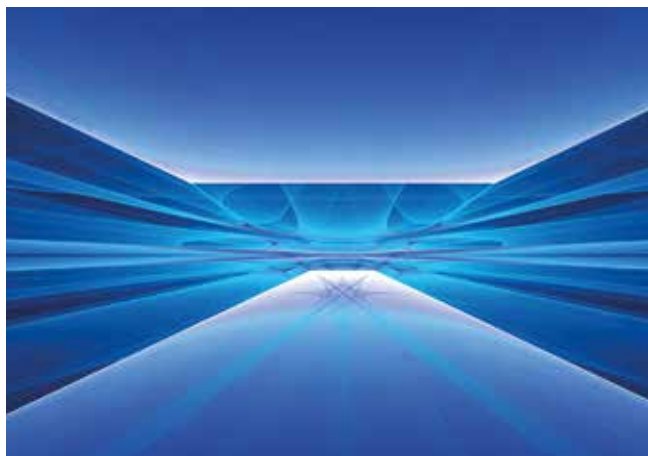
The biggest reason that a company may opt to keep an Exchange hybrid server on-premises is management. Once a mailbox migration has been completed and the Exchange servers removed, administrators lose the ability to modify mail-related attributes in a GUI; instead relying on Azure PowerShell and/or ADSIedit/Active Directory User Attribute editing. While this may not sound like a big deal, imagine that each time you want to add or modify a user's email address of aliases (such as in the case of marriage or divorce), or if you need to update membership of a group, you have to go into the object's AD account properties and make changes directly by hand-typing them.

By keeping that Exchange hybrid server around, you can continue to create, modify or delete mail related properties for users and groups, just as you always have.

As stated in the opening, there is no right or wrong choice regarding keeping or decommissioning the Exchange server once a migration to Office 365 is completed; it is just a matter of choice. Hopefully your Exchange team will weigh all of the pros and cons before deciding to pull the plug on your Hybrid server!

Neal Zimmerman is Cloud Enablement Services Manager at US managed services provider Binary Tree.

Metadata Management Solution for Governed Data Lakes



Talend has launched a new metadata management solution that brings additional transparency and accessibility to data lakes and other big data projects by providing an end-to-end view of enterprise information.

The new solution promises to provide organisations with a comprehensive governance framework for creating, controlling, attributing, defining, and managing enterprise information so they can extract and propagate additional value from their data.

"Metadata is a formidable accelerator for data understanding and regulatory compliance, which is increasingly important in the age of GDPR," said Ciaran Dynes, SVP of Products, Talend.

"Similar to how a metal detector can help you locate gold amidst a thousand grains of sand, understanding the structure, limitations, definition, and description of data protects against misinterpretation or misuse. Regardless of an organisation's size, having a solid metadata strategy is essential in an era where information is critical to the long-term success of an organisation."

Gartner research states, "With the emergence of digital business and big data, information is everywhere, and managing information assets inside and outside the business is crucial for many organizations."

Metadata summarises basic information about associated data, such as location, format, semantics, usage, and worth. Having access to such information allows companies to improve data shareability, reuse, governance, control risk, and better assess the impact of change before data is propagated across the enterprise.

Talend Metadata Manager (TMM) helps collect information from databases, modern self-service analytical tools like Tableau or Qlik Sense, big data and cloud platforms like Cloudera and Microsoft Azure, or any data pipelines managed by the Talend Data Fabric integration platform, and combines them into a holistic view of an entire information supply chain.

TMM also contains a unique business glossary to link technical definitions to corresponding business definitions and vocabulary commonly used by business users to enable self-service search, categorisation and access to needed information. This entry-level offering provides customers with an easy way to effectively oversee and augment data use, access, and compliance without needing to implement a comprehensive data governance policy.

Talend Metadata Manager is delivered as an add-on to the Talend Data Fabric integration platform, making it possible to automatically collect and map any data pipeline managed using Talend Data Integration, Talend Master Data Management Manager, Talend Data Preparation and Talend Data Quality.

<https://www.talend.com/products/metadata-manager>

Ephesoft Transact Mobile SDK 4.0 adds Deep Learning Capabilities

Ephesoft has announced the release of version 4.0 of the Transact Mobile SDK. The new version applies the latest evolution in image quality, deep learning, mobile architecture and security features to provide flexibility, accuracy and capture functionality on mobile devices.

The deep learning code in the Ephesoft SDK acts as a neural network that emulate human eyes in identifying colours, patterns and boundaries to detect edges of documents or images. Deep learning is a much more insightful methodology than simple bitonal image recognition because of its predictive capabilities, drawing on how humans think and learn.

This system has been previously trained and therefore, can predict edges, even when the camera is on smooth or noisy (textured) surfaces because it is already part of a sophisticated platform. Credit card recognition is also new feature that utilizes deep learning to not only detect edges, but extracts text and numbers. Other noteworthy features in the Transact SDK include image auto-capture and auto-alignment so mobile devices can normalize and recreate images that are comparable to images from topline scanners. Further, both online and offline batch processing is available so users can complete character recognition, document classification and data extraction offline. Once the device is connected to the Transact server, it will automatically update any new information.

Privacy and security is also enhanced in the latest Transact Mobile SDK version. Ephesoft has created a private directory where images are stored when using a mobile device. Upon exiting the application, the directory is completely erased. Similarly, the SDK supports run-time user permission for content storage and camera access.

Other new developments include the use of modern ARM 64-bit architecture, which allows for increased memory for more processing work. Image enhancement tools, simple barcode interpretation and on-device OCR all drastically improve data accuracy.

Ephesoft Transact Mobile SDK 4.0 is now available for iOS or Android devices. Ephesoft SnapDoc 4.0, a sample application that leverages the SDK, can be downloaded for free.

<https://www.ephesoft.com>

erwin declares data governance 2.0

A new data governance (DG) solution has been launched by data management firm erwin that claims to expand data governance beyond IT, so all organisational stakeholders can discover, understand, govern and socialise data to mitigate risk, improve organisational performance and accelerate growth.

The SaaS product, branded as Erwin DG, integrates with the company's other data management solutions to provide insights into how potential data changes will impact enterprise operations.

"Data Governance 1.0 has failed because it's been treated as a siloed IT program instead of an enterprise initiative with strategic value," explains Adam Famularo, CEO of erwin, Inc.

"We believe a different, persona-based approach is required, with everyone – from executives on down – invested in and accountable for data use. When data becomes everyone's business, you create an enterprise data governance experience that makes it possible to mitigate risks while maximising data's upsides for peak business performance. That's the power of Data Governance 2.0."

erwin DG integrates with erwin's data modeling (DM), enterprise architecture (EA) and business process (BP) modeling applications. Together, they power erwin's Data Impact Analysis capability, providing a way for stakeholders to identify all places

where specific data resides to determine how changes will impact people, processes and systems before they are implemented.

erwin DG also features an integrated business glossary, data dictionary and data catalogue, as well as lineage mapping and policy authoring. In addition, the software provides:

- Support for any data, anywhere (Any2) – Relational, unstructured, on-premise and cloud-based data assets are coupled with well-documented business rules to ensure standards are followed.
- Collaboration and organisational empowerment – Business and IT stakeholders have consistent, role-based views of the data relevant to their roles to build trust, ensure alignment and enhance decision-making.
- Integrated ecosystem – The systems that manage and protect data are unified by a common metadata repository for consistent exchange, understanding and processing.
- Visibility across all domains – Silos between the business and IT are broken down with a common data vocabulary, so changes to systems, processes and people can be measured quickly to produce the desired organisational outcomes.
- Regulatory peace of mind – Mitigate a wide range of risks, from GDPR to cybersecurity, to protect customer trust and prevent reputational damage.

Hyland Launches New Contract Management Point Application

Hyland has released a new Contract Management Point Application within the OnBase by Hyland enterprise information platform. The packaged solution delivers a flexible contract management offering to centralize access to information and automate routing, reviews and required tasks with an accelerated implementation time frame.

Key features include:

- A built-in clause library that allows users to quickly draft and modify contracts with pre-filled and approved clauses
- An intuitive administrative panel permitting users to monitor contract lifecycle progress and status – delivering easily modifiable process flows without needing IT support
- An integration with DocuSign and ShareBase by Hyland for secure collaboration and eSignatures with third parties
- Reporting dashboards to see real-time updates of the status of each contract
- Rapid deployment time frames and minimal service requirements to install

"Every feature within the new OnBase Contract Management Point Application is designed to help legal, procurement and contract professionals better manage their individual contract processes – from request to execution and renewal – with little to no technical experience needed," said Scott Dwyer, vice president of product management at Hyland.

Once a contracting process begins, users can track, comment and assign tasks throughout the contract lifecycle. Regardless of whether the contract requires a brief or multistage review process, OnBase manages the request appropriately. Each individual contract type can be set up with its own unique milestones, steps and action – helping organizations consolidate contracting processes into a single, robust toolset.

SecureCircle promises Transparent Security to Unstructured Data

SecureCircle has launched a new security product, SecureCircle, designed to meet the challenges of securing and managing unstructured data in a "zero-trust" world. The company claims SecureCircle automatically detects and transparently protects

data no matter the form it takes throughout its lifecycle.

Instead of deciding which files or content to protect, SecureCircle protects them all, allowing administrators to select which items to remove. This zero trust approach doesn't require user involvement to keep the data safe and it takes into account the way data is realistically used and shared within organizations. It protects enterprises from both internal and external threats without altering the way users collaborate, share and use files.

"Securing unstructured data has become a major problem for enterprises today," said Jeff Capone, SecureCircle co-founder and CEO.

"It accounts for about 80 percent of an enterprise's data and is growing at a fast clip – yet, it's extremely difficult to control. While there are many solutions that can make a few important files "self-destruct," they are only applicable as a second line of defence. Without a perimeter, enterprises need a new solution to protect their vast amount of unstructured data without requiring user adherence and with low IT overhead."

The solution secures files by protecting the content within them, which are only accessible by approved devices. It protects the content within unstructured data files of any format and for use by any application, no matter where it resides – in the cloud, at home or office, desktop or mobile.

Unlike existing technologies such as file encryption, disk encryption, Information Rights Management, Data Loss Prevention, and Cloud Access Security Brokers, SecureCircle promises complete security, reporting, and control for the massive number of unstructured data files within enterprises – ensuring that they are always encrypted, trackable and retractable. At the centre of SecureCircle is a patent-pending Transparent File Encryption solution designed to transparently protect unstructured data in any form. Files stay encrypted – at rest, in transit, or in use – regardless of where the data is stored.

Additionally, SecureCircle can automatically protect derivative work, isolate data access to authorized applications, and adaptively protect data based on the source of the file.

<https://www.securecircle.com>

NZ esignature alliance for legal docs

Esignature solutions provider Secured Signing and ADLS (Auckland District Law Society) have teamed up to introduce a new Digital Signing Service within the ADLS WebForms platform. Over 1000 law firms in New Zealand subscribe to ADLS WebForms for online legal document creation, and the launch of the new Digital Signing Service will enable legal professionals to complete their signing workflow securely and conveniently within the one platform. ADLS, an independent, national membership organisation for legal professionals, has over 4,500 members and produces and maintains over 100 widely used online legal forms, including New Zealand's popular Agreement for Sale and Purchase of Real Estate.

Joanna Pidgeon, President of ADLS, notes that the introduction of the new Digital Signing Service in WebForms will transform how lawyers, clients and their businesses work together, "As a practising lawyer I know meeting clients face-to-face will always be important. But, as people's lives become busier and traffic gets heavier, digital signing will mean increased efficiency for the document signing process, more convenience and also cost-effectiveness".

The new Digital Signing Service within WebForms enables legal practitioners to manage and track the digital signing process from one platform.

Mike Eyal, Founder and CEO of Secured Signing says "The integration of Digital Signing in WebForms offers distinctive and customised workflows designed with lawyers and their clients in mind. Whilst also providing the convenience and security of online digital signatures in one offering".

EzeScan Announces Civica Authority Financials Integration

Outback Imaging, the developer of EzeScan production capture software, has announced the addition of Civica Authority Financials to its supported financial systems.

Mike Kirkby, Managing Director of Outback Imaging stated that, "over the last couple of years we have been working closely with our technology partners Civica to deliver an out of the box invoice data capture solution to Civica Authority Financial customers."

Those customers can now leverage the power of EzeScan's high-end invoice data capture capabilities to streamline their invoice processing workflows.

"We have worked in conjunction with Civica to design and deliver a seamless integration with Civica Authority Financials, leveraging their new workflow platform. The result has been a fully featured accounts payable solution without the high end price tag," said Kirkby.

For Civica Authority Financials customers seeking to automate the processing of both hard copy and electronic invoices, EzeScan enables them to effectively reduce the time spent on manual data entry, distributing, validating and approving payment of invoices.

EzeScan invoice data capture is achieved using EzeScan's 'DISCOVERY' smart template technology to automatically search and capture key invoice header data on the fly. This approach negates the need to template 100's of supplier invoices.

EzeScan also searches and validates supplier details, provides duplicate invoice checking, purchase order matching, process partial orders, non-PO orders, uploads transactions to Civica Authority Financials and initiates the Authority approval workflow.

Additionally, records requirements can be satisfied with the output invoice images automatically uploaded to supported EDRMS/ECM systems.

www.ezescan.com.au

New Handbook for Document Control

Standards Australia has announced that a new handbook for document control is now available. Called SA/SNZ HB 168:2017, Document Control, the handbook addresses the entire life cycle of business-critical documents and provides guidelines for processes and systems for implementing an effective document control program.

Separate from record-keeping and document management, document control addresses the entire life cycle of business-critical documents. Historically, document control has often been seen as a cumbersome, time-consuming impediment to business activities due to inefficient processes and systems. However, correct implementation of document control practices can actually streamline business activities and even assist in compliance with legal obligations.

This handbook has been prepared by the joint Australian and New Zealand committee IT- 021, Records and Document Management Systems.

Chair of the subcommittee IT-021-14, Document Control, Casey Mowett commented, "In today's fast-paced, technology-enabled world, there are countless opportunities for process digitisation and automation. The development of this handbook has been done with this type of rapid digitisation in mind.

"As a result, this handbook equips businesses and organisations with technical guidelines on how to best control business critical documents."

Judith Ellis, Chair of the international ISO technical committee TC 46/SC 11, Archives/Records Management, added that the

handbook is intended to be widely applied across a number of industries.

"Serving as a complete toolkit, SA/SNZ HB 168 aims to provide the guidelines necessary for organisations to be in the best position possible as they strive to achieve best practice, as well as efficient and accountable document control."

The complexities of document control processes are such that every organisation should always consider their own circumstances when using this handbook as a guideline.

The standard is available from the SAI Global InfoStore.

BlackStone Claims Fastest Redaction Technology for eDiscovery

BlackStone Discovery has developed a native redaction tool with the promised ability to review and redact entire spreadsheets in a matter of seconds. The Silicon Valley's eDiscovery consulting and litigation support provider says its LineOut offering takes redaction to the next level by reading entire rows instead of individual cells.

It says while other common redaction tools are comparable in their use of search terms to target information, they are unable to remove large blocks of data at the row level.

"There's usefulness to be found in simpler redaction tools, but there's nothing available that is as fast and cost-effective as LineOut," says Jeff Carpenter, the lead developer of LineOut.

"The need for accurate and affordable row redaction was a problem that long beguiled our clients, and LineOut was specifically designed to meet that need."

LineOut is a solution for redacting large tables where each row is an entry. This pertains specifically to databases, which BlackStone says LineOut combs through faster than any other redaction tool. For highly customised redaction requests, LineOut can be used in tandem with BlackStone's single-cell redaction tools to optimize results.

Reviewers with access to industry standard redaction technology can typically redact between 20 to 30 spreadsheets an hour. On average, LineOut redacts 727 spreadsheets an hour (over 12 per minute).

<https://www.blackstonediscovery.com/lineout/>

Quantum Unveils New LTO-8 Tape

Quantum has announced that LTO Ultrium format generation 8 technology, with 2X capacity gain and 20 percent performance improvements over LTO-7, will be available in its Scalar tape libraries and StorNext AEL archive systems beginning in December 2017.

The Scalar and StorNext AEL tape automation solutions available offer up to 10PB uncompressed in a single 19-inch rack, and up to 144 PB uncompressed within a standard data centre aisle.

The new LTO generation 8 doubles the tape cartridge capacity from the previous LTO generation 7, enabling storage of up to 30 TB per cartridge. In addition, with tape drive data transfer rates of up to 900 MB per second, or more than 3.24 TB of data an hour per drive, LTO-8 systems allow large files to be transferred more quickly.

LTO-8 also includes a new format feature that increases the capacity of the latest LTO generation 7 cartridges by up to 50 percent to store 22.5 TB* of enterprise data. Quantum says the combination of LTO-8 technology with Scalar and StorNext AEL tape automation offers better storage densities than proprietary tape technologies, and with Quantum certified media, LTO bit error rates are equivalent to those of legacy proprietary media.

LTO technology is the ideal solution for companies using tape for low-cost, long-term "big data" storage, or companies using tape as an offline copy to protect against ransomware.



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