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Quest adds SharePoint suite with Metalogix buy

Quest Software, a global systems management and security software provider, has announced the acquisition of Metalogix, a provider of migration, management and security solutions for Microsoft SharePoint and Office 365.

The acquisition of Metalogix strengthens the Quest Microsoft Platform Management solution portfolio by extending capabilities to support SharePoint, SharePoint Online, and OneDrive for Business.

The Quest Microsoft Platform Management solutions have been used to move, manage and secure more than 180M users globally for on-premises, cloud and hybrid environments, including Active Directory, Exchange, Azure AD, OneDrive for Business and Office 365.

"The addition of migration, management and governance software for SharePoint and OneDrive solidifies Quest's leadership position and strengthens our commitment to helping organisations easily migrate and manage their Microsoft workloads, whether on-premises, in the cloud or in hybrid environments," said Michael Tweddle, President and GM, Quest Microsoft Platform Management.

"The Metalogix portfolio brings us the needed management and governance solutions to support SharePoint, SharePoint Online, and One Drive for business – further extending our ability to help organizations manage workloads across every aspect of their Office 365 environment."

Social SafeGuard Raises $US11M

Social SafeGuard, a leading provider of software for digital risk protection, announced last week it has raised $US11 million to help expand and market its designed to help businesses stop the spread of fake accounts, fake news, brand impersonation, social phishing, malware, spam and other threats across digital and social channels.

Officials in the U.S., Europe and Asia are adopting new regulations for digital privacy and data management, including large potential fines for companies that don't rigorously manage their online interactions.

"Digital and social channels are the new battleground in cybersecurity, and businesses need to build up their defences," said Jim Zuffoletti, founder and CEO of Social SafeGuard.

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"This is quickly becoming a priority for security leaders, risk managers and digital marketers at every company."

Social SafeGuard was founded in 2014 and provides cloud-based software to manage the full life cycle of digital risk protection, so enterprises can detect, analyse and prevent attacks in real time – while automating governance and compliance.

https://www.socialsafeguard.com/

Microsoft Teams goes Freemium

Previously bundled with Office 365, Microsoft's latest collaboration platform Teams is now available in a free version in 40 languages. The free version of Teams can include up to 300 people and provides all of the Office Online tools as well as 10GB of team file storage plus additional 2GB per person for personal storage. (An Office365 subscription is required in order to obtain the Office desktop apps)

Both free and paid versions of Teams also offer integration with a range of apps including Adobe, Evernote, and Trello. Inline translation in 36 languages is now available in the paid version of Teams and coming to the free version later this year.

According to Microsoft 365 Commercial director Evan Williams, more than 200,000 businesses across the globe use Microsoft Teams for chat, meetings, video and phone calls and file sharing.

Korda Mentha was one of the first Australian businesses to adopt Microsoft Teams. By February this year it was the most prolific per capita user of the platform in Australia with around 75 per cent of KordaMentha employees using Teams regularly.

With eight offices and almost 400 staff across Australia and Asia Pacific, KordaMentha offers a broad range of corporate, forensic and investment services.

"Analytics, financial platforms, CRMs, news feeds – all this data becomes very messy. Teams allowed us to aggregate all that information in one spot – that's been a real benefit," said Ryan Wadsworth, chief information officer.

Wadsworth says that today Teams is ingrained with KordaMentha's workflow. "It also speaks to the modern workplace. Everything lives inside Teams – people don't recognise they are leveraging Skype or SharePoint, or Word or Excel, or Power BI. They are organically using the platform, discovering new ways to do things … new analytics, new visualisations to deliver to clients relatively easily."

https://products.office.com/en-au/microsoft-teams/group-chat-software

ZircoDATA announces new acquisitions in Queensland and WA

Records management and business process outsourcer ZircoDATA has completed its fifth and sixth acquisitions respectively with Integrated Records Management based in Kewdale, WA, on 14 June 2018 and the Records & Information Management (RIM) division of National Storage Brisbane on 29 June 2018.

"These acquisitions highlight how important it is for us to strengthen our footprint, not only in these two markets, but across all of Australia. This is another significant win for the ZircoDATA team and we will continue to look for opportunities around Australia to offer new clients our extended range of information management services." Nick Kwan, Chief Financial Officer, ZircoDATA. Terms of the deals were undisclosed.

ZircoDATA was formed by Dennis Barnedt, a major figure in the global records and information management industry, who has founded, acquired, managed and developed leading companies in the sector across the United States and Europe.

He founded Access Information Management Inc. in 2004, now the largest privately-held records and information management company in the US and second largest in the world.

www.zircodata.com.au

Finance reveals plans for 2019 records management tender

The Department of Finance has scaled down its ambitious plan to implement a state-of the-art whole of government automated records management platform for Australian Commonwealth Agencies and will now seek to establish a panel of qualified RM vendors in 2019.

A moratorium on new investment in records management solutions remains in place, however the range of exemptions has expanded to cover almost half of Commonwealth Government bodies. Agencies that wish to update existing RM systems to maintain vendor support are also being given permission.

In May 2016, Finance had initially recommended that agencies be required to opt in to receive records management as a service (RMaaS) from a lead agency.

After more than three years of work and millions of dollars invested, Finance is now requesting that industry vendors help it draft requirements for a new panel that will be put in place in 2019. This is in addition to several existing panels that already include vendors of record-keeping platforms.

At an industry update session, Kayelle Drinkwater, Assistant Secretary, Accountability and Reporting, said the Department of Finance would make available a set of rules and some code it had developed to provide vendors some form of guide to future capability directions. A Request for Proposal (RFP) will be made available via Austender in October 2018.

"We don't have all the answers in the Government, and [the RFP is] your opportunity to influence the [details of the] tender for 2019," said Drinkwater. Finance wants to increase the productivity of all APS workers by removing the need for 'end user filing', by applying smart technology that will automatically extract and categorise information held within common business systems such as Word, Outlook and SharePoint.

While announcing the Government's preference for open source technology, Drinkwater strongly emphasised the importance of Active Directory integration.

Those vendors who respond to the RFP in October will not be assessed or scored. Their submissions will be used to guide the drafting of a followup Request for Tender (RFT) in 2019 but there would be no "advantage or disadvantage" in responding to the RFP stage, Drinkwater said.

Finance wants digital records management solutions that incorporate smart technologies such as auto-classification, ontology management, machine learning and built with a Micro Services Architecture to support easier communication and integration with existing business systems.

Vendors that are successful in being placed on the panel in 2019 will need to demonstrate these capabilities or lay out a roadmap for achieving them in the future.

One attendee at the briefing commented that "Industry has already gone through a 'non-assessed' process of claiming capability against stated requirements in 2017's 'Market Day' – only to have an unsubstantiated critical assessment of aggregate capability fed back into the public domain, to considerable disquiet. Industry has previously told Finance it has these smart technologies already, but they are not being utilised; Finance effectively publicly rejected these claims without substantiation.

"Micro Services Architecture is a vague term and is certainly not necessarily 'smarter' than its peers. Theoretically, it has advantages if done well but it's certainly not magic or a silver bullet, and for a small cadre inside Finance to be stipulating architectural requirements instead of outcomes to industry is hubristic to say the least."

Worldwide Spending on Blockchain to Reach $US11.7 Billion in 2022, IDC

Worldwide spending on blockchain solutions is forecast to reach $US11.7 billion in 2022, according to a new update to the Worldwide Semiannual Blockchain Spending Guide from International Data Corporation (IDC). The analyst firm expects blockchain spending to grow at a robust pace throughout the 2017-2022 forecast period with a five-year compound annual growth rate (CAGR) of 73.2%. Worldwide blockchain spending is expected to be $US1.5 billion in 2018, double the amount spent in 2017.

"Enthusiasm for blockchain continues to be universally shared across regions as businesses and organisations alike continue to explore the technology's potential business application," said Stacey Soohoo, research manager with IDC's Customer Insights & Analysis team.

"Regulatory concerns and industry standards continue to hinder widespread adoption as governments around the globe work with enterprises to formulate policies and governance."

The US will see the largest blockchain investments and deliver more than 36% of worldwide spending throughout the forecast. Western Europe will be the next largest region for blockchain spending, followed by China and Asia/Pacific (excluding Japan and China) (APeJC).

All nine regions covered in the spending guide will see phenomenal spending growth over the 2018-2022 forecast period with Japan and Canada leading the way with CAGRs of 108.7% and 86.7%, respectively.

Blockchain spending will be led by the financial sector ($US552 million in 2018), driven largely by rapid adoption in the banking industry. The distribution and services sector ($US379 million in 2018) will see strong investments from the retail and professional services industries while the manufacturing and resources sector ($US334 million in 2018) will be driven by the discrete and process manufacturing industries.

In the USA, the distribution and services sector will see the largest blockchain investments. The financial services sector will be the leading driver in Western Europe, Middle East and Africa (MEA), China, and APeJC in 2018. The industries that will see the fastest growth in blockchain spending will be process manufacturing (78.8% CAGR), professional services (77.7% CAGR), and banking (74.7% CAGR).

Within the financial sector, blockchain lends itself to a number of common use cases including regulatory compliance, cross-border payments & settlements, custody and asset tracking, and trade finance & post-trade/transaction settlements.

In the distribution and services sector and the manufacturing and resources sectors, the leading use cases include asset/goods management and lot lineage/provenance. Cross-border payments & settlements will be the use case that sees the largest spending in 2018 ($US193 million), followed by lot/lineage provenance ($US160 million) and trade finance & post-trade/transaction settlements ($US148 million). These three use cases will remain the largest in terms of overall spending in 2022.

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Sources
1 Based on average scanning volume for global Alaris install base
2 Based on internal Alaris evaluation of industry analysts' market revenue data
3 Alaris manufacturing data
4 Based on keypoint Intelligence-Buyers Lab testing of the Alaris S2000 Series Scanners
5 Based on Kodak Alaris Service Systems records for 12 months (April 2017-March 2018)
6 US Patents awarded since 1990
7 Based on Keypoint Intelligence-Buyers Lab testing of 19 scanners (2 million pages) in the past 5 years

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Senate splits on Digital Transformation report

A Senate Inquiry into "Digital Transformation" has issued a report that is highly critical of the Australian Commonwealth Government's efforts to date, although the report's conclusions are firmly split along party lines.

With an ALP/Greens majority on the committee, the final report was predictably scathing of the Liberal-National coalition government.

It "considers that the government has not demonstrated that it has the political will to drive digital transformation."

"It has become clear to the committee that digital transformation is a policy area beset by soaring rhetoric and vague aspirations by government, largely unconnected to the actual policy activities actually undertaken," the committee's majority said.

However, a dissenting report from the minority of Government senators on the committee argues that "there have been hundreds, if not thousands of digital projects, both large and small, funded by the government that have been delivered successfully … the very few examples hand-picked by the committee represent very much isolated unfortunate exceptions against a background of high performance in the delivery of digital solutions."

The report includes a lengthy section attempting to define "What is 'digital transformation' of government services." It does not reach any firm conclusion.

Committee Chairperson, ALP Senator Jenny McAllister, puts forward a utopian vision for the promise of digital transformation. i.e. "that technology will open up new policy possibilities and allow government to make a real impact in people's lives more effectively, efficiently, and frictionlessly."

Report highlights significant legacy systems challenge

A large portion of the report is devoted to four case studies, three at the Department of Human Services (DHS) and one at the Australian Taxation Office (ATO).

The ATO web site outages of 2016-2017 were highlighted, however this was caused by a network hardware failure and not a particular product of any Digital Transformation efforts.

The DHS came in for some severe criticism over the expense and ongoing delays in the replacement of a legacy application for child support, a program that was initially to be completed by late-2015 but was finally suspended in mid-2018 with over $A100 million spent so far.

However once again, this was not specifically a Digital Transformation initiative, it was undertaken because a legacy system was nearing end of life.

The Committee received many submissions highlighting the extent of the legacy issues that are hampering digital transformation efforts within Commonwealth Government agencies.

"A number of department and agencies' submissions demonstrated the difficulties arising from 'legacy' systems, such as new systems being overlaid on outdated hardware which in turn have been subject to ad hoc iterations of updates and upgrades, as well as outmoded business processes, and security vulnerabilities arising from old technologies," the report notes.

A 2015-16 ICT trends report found that 44 per cent of the government's major applications are over a decade old and that 53 per cent of the government's desktops and laptops are past the end of their planned useful life.

Ian Brightwell, former CIO of the NSW Electoral Commission, noted that ICT program failure in the APS is due in part 'to poor backend infrastructure and systems upon which to build online systems'.

The DHS' legacy ICT systems are now over 30 years old.

John Murphy, DHS Deputy Secretary, Payments Reform, noted that "… essentially, the environment that we're working in is one that was largely designed back in the 70s, 80s and 90s, which was largely constructed around paper and telephones and largely based on face- to-face interactions.

" I think it's fair to say that that mode of operating has largely continued. I think we would all recognise that, in this day and age - particularly around customer expectations of digital, simple, clear, easy-to-use, safe and available anytime, anywhere - that is a very, very difficult proposition for the delivery of welfare without a fundamental change."

The National Archives of Australia (NAA) reinforced the legacy challenge with its estimate that almost 40 per cent of Commonwealth agencies have not implemented a program for assessing, keeping, migrating or destroying their digital information. Additionally, over half (52.4 per cent) of agencies reported in 2016 that they lacked the business processes and systems to enable the migration (transfer) of relevant digital information to the Archives. Also of concern is the low number of agencies which have not identified the cost-benefits of managing information digitally, with just 2.4% doing so in 2016."

Paul Shetler, former Chief Executive Officer at the Digital Transformation Office, along with former colleagues, submitted that, "The Australian Government should develop a clear understanding of legacy applications. Legacy applications are not limited to old technologies.

"They may include systems that are still current, but whose vendors are unable to support government's future technology vision. As a whole-of-government initiative, there should be clear pathways and timelines for transitioning to a modern technology architecture, with regular reporting to these plans

> ... the environment that we're working in is one that was largely designed back in the 70s, 80s and 90s, which was largely constructed around paper and telephones and largely based on face- to-face interaction ...

"Legacy, poor architecture and non-standard projects slow down or work against the transformation of government services; wrong methodologies, inappropriate outsourcing, wrong/ incompatible/obsolete technology make things worse. Departmental inertia is such that spending needs to be controlled so that departments are delivering the right thing, the right way.

"Our experience working in digital transformation in the United Kingdom has suggested that providing a single agency with spend controls over whole-of-government digital products is the best way to ensure coherent and consistent service delivery. Digital teams should be required to regularly report on project methodologies, timelines and achievements to date in order for funding to be continued."

The Digital Transformation Agency has been allocated funding of $A33.5 million to undertake its lead role until 2019-20. It has oversight of all ICT projects worth greater than $A10 million.

The Senate Committee report concludes that "Its contribution is muted because its role is confined to the level of assistance with discrete projects at the operational level.

"Even there, its involvement is limited. At the time of its creation, it was intended to operate as a 'powerful new program management office' that would track ICT and digital projects across the whole of government, stepping in to remediate where things are not working. In reality, it had only a minor role in the case studies examined by this committee."

Government senators disagreed "with the majority view that a centralised mega-agency is the answer to the whole-of-government approach to digital transformation of government services.

In their dissenting report, Senators James Paterson and Amanda Stoker write "Such an approach to digital transformation is rooted in the old command-and-control view of the public sector that does not acknowledge the need for active engagement, flexibility and collaboration.

"The functions of government departments and agencies are diverse and distinct and it is important that the relevant corporate and policy expertise and knowledge are harnessed when transforming service delivery.

"Where appropriate, Government senators support an approach where departments and agencies have the ability to build digital platforms and solutions to meet their particular portfolio programs.

"Such platforms and solutions should be leveraged as appropriate across the government and more importantly, should continue to place the users and their experience at the centre."

The full report is available at https://www.aph.gov.au/Parliamentary_Business/Committees/Senate/Finance_and_Public_Administration/digitaldelivery/Report

Is GDPR a blockchain killer?

By Kasey Panetta, Gartner Inc.

Security and risk managers must consider how GDPR applies to enterprise-sanctioned blockchain and personal data.

Enterprises looking to enact blockchain technology must now also determine whether or not the information is subject to the EU's General Data Protection Regulation (GDPR). Further, enterprises must explore if, at its core, blockchain is fundamentally a violation of GDPR.

For example, a core tenet of blockchain is immutability or the idea that once data is recorded, it cannot be modified, versus the GDPR's requirement that consumers be able to erase personal data.

Although blockchain might be initially seen as incompatible with the GDPR requirements, the reality is that enterprises must exercise caution and judgment — not that blockchain is no longer an option.

"GDPR and blockchain form a powerful intersection of emerging governance and technology trends, although their unique characteristics raise immediate concerns about their mutual compatibility," says Garth Landers, research director at Gartner.

"Security and risk management leaders must implement safeguards to ensure that any blockchain designs comply with GDPR."

GDPR will generally be applied to any enterprise-sanctioned blockchain that contains personal data. Because of the breadth of the regulation, it's possible enterprises won't actually realise that it applies to their blockchain. Consider the following three questions when assessing your blockchain:

- Do you offer goods or services to people in the EU?
- Do you profile or monitor behaviour (including online activity) of people residing in the EU?
- Do you process personal data on EU residents on behalf of a company in the EU?

A "Yes" to any of these questions warrants further investigation into whether or not the technology is subject to GDPR. Don't forget that even companies located outside of the EU are subject to the regulations if they work with data of EU citizens.

Enterprises definitely want to establish whether GDPR applies, as non-compliance can incur a sanction to a maximum of 20 million euros or 4% of annual turnover, whichever is higher.

GDPR contains a section dealing with "rights of the data subject." This includes things such as people's' right to access the information processed on them, the right to correct and amend that information, and the right to take it elsewhere and erase it.

Erasure or "the right to be forgotten" allows for deletion or removal of personal data where there exists no compelling reason for continued processing. Companies must have a protocol for removing the information, which at first glance is difficult for blockchain due to its immutability. However, the regulation also allows for pseudonymisation, which allows companies to replace a name with a relatively anonymous label. Alternatively, it's possible to create a blockchain where no personal information is stored in the chain, just a reference to the data, which is stored as a hash or token.

It's possible to have blockchain and remain compliant with GDPR. However, it requires security and risk experts to work with blockchain architects to ensure all data is stored in a way that does not violate privacy laws. This might be done by, as noted, storing data differently or even architecting the blockchain in a permissioned way.

UK National Archives Tests Using Blockchain

A joint research project in the United Kingdom is investigating the use of blockchain technology to ensure the accuracy of historical documents.

Project ARCHANGEL, a research initiative funded by the National Archives in the United Kingdom and based out of the University of Surrey, is testing blockchain solutions that preserve the long-term integrity of documents saved within digital archives for public institutions.

The ARCHANGEL project is creating a prototype using blockchain technology which aims to enable archives to generate and register hashes of documents (similar to unique digital signatures) into a permissioned blockchain (in other words, one which can only be added to by authorised organisations). Where the record has been legitimately changed, hashes of the content, alongside hashes of the code used to make the change, can also be registered on the blockchain.

This would mean that whenever a digital record is modified, an audit trail is created and users are able to know exactly how a document has been edited.

Alex Green, Digital Preservation Services Manager, writes on The National Archives blog, "Our approach will result in the creation of many copies of a persistent and unchangeable record of the state of a document. This record will be verifiable using the same cryptographic algorithms, many years into the future.

"As this approach matures, we hope that the ledger would be maintained collaboratively by distributing it across many participating archives both in the UK and internationally, as a promise that no individual institution could attempt to rewrite history.

This technology could transform the sustainability of digital public archives, enabling archives to share the stewardship of the records and, by sharing, guarantee the integrity of the records they hold."

ARCHANGEL has a proposed timeframe of 18 months. It is set to prototype a distributed ledger technology (DLT) service that will "collect robust digital signatures derived from digitized physical, and born-digital content," according to Green.

The research is funded by the Engineering and Physical Sciences Research Council, which invests more than £800 million a year in fields such as mathematics and information technology.

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Manufacturing to drive Digital Transformation in APAC: IDC

Industry analyst IDC has published its semi-annual estimate of spending on Digital Transformation for the Asia/Pacific region (excluding Japan) which it expects to reach over $US380 billion in 2018, recording a double digit increase of 15.3% against $US334.8 billion spent in 2017.

IDC claims the manufacturing industry will have a major share of Digital Transformation spending in 2018, representing around 35% ($US135.3 billion) of the overall spending on solutions in 2018. From a technology perspective, connectivity services, applications and enterprise hardware are the leading technology categories contributing to the DX spending, as enterprises build out their digital platforms to compete in the digital economy.

"Digital transformation is gathering pace in the APeJ region. Stiff competition from early adopters are driving others to begin transformational efforts," said Ashutosh Bisht, Senior Research Manager, IDC Asia/Pacific.

"Innovation accelerators are the major catalyst towards transformation; Leaders in this space are prioritizing Artificial Intelligence, Cognitive and Robotics to achieve their business goals, also emphasis is observed in the IoT implementation," added Bisht.

For attaining their respective Digital Transformation strategic priorities, IDC believes enterprises will develop programs that represent a long-term plan of action toward these goals. Smart Manufacturing ($US79.9 billion) and Digital Supply Chain Optimization ($US42.2 billion) are the strategic priorities where enterprises will have the maximum spending in 2018.

Smart Asset Management, Digital Supply Chain and Logistics Automation and Manufacturing Operations are the three largest Digital Transformation programs in 2018. The programs that IDC predicts to witness highest growth over the five-year forecast (2016-21) include Construction Operations (40.7% CAGR) followed by Clinical Outcomes Management (37.5% CAGR) and Cyberthreat Detection and Prevention (36.5% CAGR).

Robotic Manufacturing, Freight Management and Asset Instrumentation use cases account for around 18% of Digital Transformation spending in 2018. On the flip-side, Robotic Process Automation-Based Claims Processing is expected to register fastest growth at five-year CAGR of 57.1% over the forecast period 2016-21 followed by Mining Operations Assistance (52.7% CAGR).

Corrs helps drive breakthrough Ethereum blockchain transaction

Australian law firm, Corrs Chambers Westgarth, has teamed up with ConsenSys start up, OpenLaw, to achieve a breakthrough that aims to unlock the potential of the Ethereum blockchain and smart contracts in the settlement of real estate and property transactions.

In what is believed to be an Australian first, Corrs and OpenLaw have successfully developed and simulated an end-to-end real estate transaction on the Ethereum blockchain. Ethereum is an emerging, decentralised ledger and computing platform, which is popularly used to experiment with, and deploy, smart contracts. The special project provides a window into the future of real estate deals and showcases how smart contracts (developed and executed via OpenLaw's protocol) might be used to manage, automate and streamline the sale of land, reducing commercial friction and transaction costs.

With the success of the initial phase of this project, Corrs and OpenLaw have demonstrated that it is possible to transfer a house or plot of land based on Ethereum's new ERC721 non-fungible token standard (a token that can be embedded with additional information to represent, for instance, a unique physical asset). While only the first iteration, it lays the foundation for international, tamper-resistant land registries that may provide an improved way of tracking the chain of custody in real property, where an accurate record of who owns what is critical. A blockchain-based system that automatically and indelibly tracks the transfer of title may significantly reduce record-keeping costs, curtail fraud and avoid many of the risks inherent in traditional land registries and deeds-based systems. This is particularly true in developing jurisdictions where corruption, the risk of destroyed records or human error may be high.

"It's an exciting and very promising first step," Corrs lead partner on the project, Robert Franklyn, said. "There are still many practical challenges to overcome to enable the implementation of this sort of technology in Australia and elsewhere, including the introduction of necessary enabling legislation. We also need to develop the smart contract to accommodate and keep track of the other sorts of information that we would normally see associated with a property like mortgagee rights, caveats, easements, restrictive covenants and so on."

OpenLaw and Corrs will continue to develop the project as those practical limitations are solved, including through improvements to Ethereum and OpenLaw's platform.

Indonesian Law Firm adopts Luminance AI

Independent law firm UMBRA – Strategic Legal Solutions has become the first Indonesian customer to adopt Luminance's artificial intelligence platform. UMBRA, which was established in November 2017 by lawyers from one of the largest and leading law firms in Indonesia, selected Luminance following an initial demonstration of the technology. In particular, the firm valued Luminance's pattern recognition approach, which understands language in documents by context and content, and not just by searching for certain words. With over 30 lawyers, the firm will also benefit from Luminance's workflow tools, helping UMBRA's lawyers to collaborate in real time.

"Innovation in the legal profession is crucial to remaining at the forefront of the sector. Since its inception, UMBRA is specifically designed to face the age of disruption and as such, adopting pioneering technology to improve the quality of our legal services is simply the logical consequence of our vision of being a different kind of law firm" said Pramudya A. Oktavinanda, Managing Partner of UMBRA.

"We decided to invest our resources through our collaboration with Luminance as we believe the incorporation of technology that can read and understand all types of documents much faster than humans can leave more time for the analytical thinking that our clients value so highly. It is time to bring a revolution to M&A and securities due diligence exercise."

Developed by mathematicians from the University of Cambridge, Luminance harnesses proprietary machine learning algorithms to read and understand legal documents in a similar way to humans, coping with volumes and working at speeds that no human can match. Trained by legal experts, Luminance can highlight anomalies among large groups of documents allowing lawyers to prioritise their work.

IoT uptake varies across APAC: survey

Digitally ambitious enterprises across all the industries in the Asia-Pacific (APAC) region are betting big on Internet of Things (IoT) solutions to achieve operational efficiencies and cost reduction, says data and analytics company GlobalData.

The company surveyed more than 300 small, mid-market and large enterprises, which are already using or planning to use IoT, in APAC across a range of vertical industries such as manufacturing, utilities, retail and healthcare.

In its report '*Enterprise IoT in Asia Pacific: Scope of deployments, use cases and investment plans*', GlobalData found that equipment process and management was the most common use case in APAC across all the industries covered in the survey due to the immediate financial benefits driven by operational efficiency.

However, there are some differences in each country and for example, smart city is driving IoT deployment in Japan and infotainment systems/smart signage in Indonesia.

There are various connectivity technologies that can be used for IoT deployments, depending on the use cases.

Most of the IoT deployments in APAC use long range wireless technologies for connectivity and specifically use 3G and LTE technologies for licensed connectivity and Wi-Fi for unlicensed connectivity.

Kryon Systems boosts robotic automation with ABBYY FlexiCapture

Kryon Systems, an Israeli provider of intelligent Robotic Process Automation (RPA) solutions, has integrated ABBYY's FlexiCapture solution into its Leo RPA platform in order to provide a single platform for document automation.

This integration will offer businesses RPA services that include the ability to parse unstructured data for invoice and purchase order processing. Digital transformation is leading companies to turn to automation technologies in order to reduce errors, increase efficiency and boost profits across the enterprise.

Kryon Systems' RPA solution provides a workforce of "digital employees" onto whom crucial yet repetitive and time-consuming processes can be offloaded, enabling employees to devote more attention to higher value tasks that more directly contribute to the core mission of the company.

Traditionally, unstructured documents such as invoices and purchase orders, which lack standardized formats and are submitted as PDFs or scanned documents that cannot be edited, have posed an obstacle to automation efforts. By leveraging ABBYY, whose AI-powered document automation technology transforms unstructured documents into standardized files and alerts the relevant party when it is unable to do so, Kryon Systems is removing the hurdle which previously prevented the automation of these processes.

"The needs of enterprises are evolving all the time, and we are constantly expanding the capabilities of our RPA platform to ensure that we provide a one-stop-shop automation solution for companies, no matter what processes they are seeking to optimize," said Harel Tayeb, CEO of Kryon Systems.

"Our new partnership with ABBYY allows us to help companies transcend the problem that unstructured invoices and purchase order forms cause by simply removing a substantial amount of time-consuming tasks from their employees' workloads so they can focus on higher value assignments."

ABBYY's FlexiCapture platform is able to handle documents of any format, layout and structure thanks to its in-built, proprietary machine learning and natural language processing technology.

Invoices, which vary by supplier, are automatically read and processed, providing all necessary data to Kryon Systems' Leo platform to execute the remainder of the process – checking and approval procedures, and posting to ERP systems for payment.

www.kryonsystems.com

iManage Cloud Delivers for Donovan & Ho

Malaysian law firm Donovan & Ho has implemented iManage Work Product Management in the iManage Cloud for secure collaboration and to increase the firm's efficiency.

The small, fast-growing firm, which previously did not utilise a dedicated document management system, saw an opportunity to increase its legal professionals' efficiency and enhance client service through adoption of iManage Work document and email management. Due to very limited IT resources, the firm also needed a reliable and easy-to-maintain solution. With iManage Cloud, Donovan & Ho gains on-demand access to iManage Work 10 for document and email management.

"iManage is the global leader in the legal space, so entrusting iManage was actually quite easy for us," said Shawn Ho, Founding Partner, Donovan & Ho.

"Our firm handles confidential documents every day and it was imperative to select a reliable, secure and easy-to-manage document management system. By moving to iManage Cloud, we're no longer concerned about downtime due to server issues – iManage Cloud provides us easy and secure access to all our documents, all the time."

iManage partner ServTouch provided local professional service and technical expertise, which contributed to the successful iManage Cloud implementation for Donovan & Ho.

"Any firm, regardless of size, needs to have effective management and governance of its critical documents, emails and other work product to keep its clients' trust," said Dan Carmel, Chief Marketing Officer, iManage. "By choosing iManage, Donovan & Ho has gained a competitive edge while removing the burden of managing IT infrastructure, allowing the firm to focus on delivering excellent service to its clients."

Intelledox to streamline Port operations

North Queensland Bulk Ports (NQBP) has implemented a digital pilot passage plan using the Intelledox Infiniti platform – the first port authority in Australia to do so.

A passage plan, which is required for each ship that arrives and departs port, helps pilots to manage on-board mooring operations. It contains information such as the ship dimensions, arrival times, license number, berth allocation tidal information and real-time weather. The digitised version utilises an online form that makes it easier for pilots to capture and analyse data and delivers several operational efficiencies.

Intelledox Infiniti integrates with the scheduling tool provided by Maritime Safety Queensland (MSQ), which tracks the movements of all ships into Queensland ports. This allows NQBP pilots to pull relevant information from MSQ, and automatically pre-populate the online form.

The automated process removes reliance on data entry, saves pilots valuable time, eliminates the need for paper forms and reduces error rates.

"At NQBP, we oversee mooring operations for around 8 to 12 ships each day – and we need to complete a unique passage plan for each one. We take this passage plan on board each ship to go through procedures in detail with the captain," says Marine Pilot Luca Orlandi.

"Previously, we had to log in to the MSQ database to look up the information we needed, and then manually enter data on paper forms to take aboard the ship, before transferring the data to an Excel spreadsheet when we returned to port. An 80% time saving and real-time data ingestion helps pilots focus on other important issues when entering and exiting ports."

The mobile-friendly digital solution allows pilots to access and modify data in real-time, whenever they need to – including on board the ships.

"Plans can change very quickly when ships are due to arrive at port. If a ship is delayed, which often happens, then we need to update the records accordingly. When the process was paper- based we had to start afresh and fill out new forms. Now the passage plan is easy to update digitally."

NQBP has implemented a solution on the Intelledox platform which is unique in delivering safety and efficiency. The mobile friendly forms are central to the solution and it's exciting to see how NQBP have adopted a visionary approach and integrated multiple data services to achieve their outcomes, says Intelledox CEO Ray Kiley.

"The simplified process has facilitated ease of communication between all parties involved in mooring operations and aligns with NQBP's focus on safety when moving ships in and out of port. The efficiencies delivered through implementing digital forms suggest there is significant potential for other port authorities to realise similar benefits in future," says Intelledox CEO Ray Kiley.

IXUP Signs Pilot with Equifax Australia

Big data startup IXUP Limited has signed an agreement to pilot its software with Equifax Australia, the local operations of the global credit rating firm.

The Agreement provides Equifax access to the IXUP Data Collaboration software and the ability to undertake pilots of new and innovative solutions that, once implemented, can be transitioned into fully commercial solutions which Equifax can take to market with its customers.

It follows a technical due diligence process in which Equifax robustly tested the IXUP technology platform and its capabilities to deliver secure data and trusted collaborations.

This is IXUP's first pilot agreement of its new platform, representing an important milestone in the commercialisation process.

IXUP Executive Chairman Tim Ebbeck said: "Our strategy is to demonstrate and deliver a superior experience for users of our platform. We're excited to have the opportunity to build pilots to enrich the data collaboration experience for Equifax and demonstrate the unique value of our safe, disruptive technology within the data collaboration market. We are building momentum in the market."

The pilot will last for 12 months and is described as a collaborative partnership for the purpose of undertaking non-commercial, non-production pilots of potential service offerings (use cases) which may then be taken to market by Equifax in Australia under commercial terms. There is a maximum 3 months duration per pilot and there is no limit on the number of pilots Equifax can undertake in the Term.

The primary goal of pilots is to demonstrate the value of IXUP's software for Equifax and other businesses in the data services market, and simultaneously improve the Equifax experience for users.

Whilst the pilot itself will not generate material revenue, it is hoped that the pilot will lead to commercial arrangements thereafter.

Dentons Rodyk Enhances Document Review with Litera

Dentons Rodyk, a member of Dentons – the world's largest law firm – will be the first firm in Singapore to provide all its lawyers and staff with Contract Companion, a tool that leverages Artificial Document Intelligence to achieve unparalleled analysis speed, greater accuracy, and improved workflow when reviewing and proofreading documents.

Kenneth Oh, Senior Partner at Dentons Rodyk, said "To deliver the highest value to our clients and continue innovating as a firm – we are constantly sourcing for solutions that will assist our lawyers to meet clients' expectations for transaction turnaround – while fulfilling our commitment to quality and accuracy."

He added, "Having analysed the time savings of legal professionals by leveraging artificial intelligence through Contract Companion and DocXTools Companion – and the risk management proposition they offered – we were convinced that the Companion suite is an impactful technology investment that would yield us immediate returns."

Rocio Perez, Manager of Innovation and KM Solutions for Dentons Rodyk, said "The Companion suite is a key component of our strategy to deliver long-term value to our clients – by helping our legal professionals complete essential tasks more quickly, we allow them to focus on high-value work, continuous improvement and innovation."

She added, "We are especially proud of our lawyers' role in driving adoption of the Companion suite – and the firm remains committed to empowering our legal professionals to innovate. In particular, Loy Zhi Hao, Senior Associate, built a strong case for adoption by working through Dentons Rodyk's internal innovation curriculum – developed in partnership with the Future Law Innovation Program (FLIP) by the Singapore Academy of Law."

Recordkeeping Reality Check

Why are organisations still struggling to get the promised benefits from records management?

By Rachael Greaves, CIO, Castlepoint Systems

The International Standard for Information and Documentation – Records Management (also known as ISO 15489) includes a list of the benefits that come from doing records management well. The list is broken up into three broad groups, pretty much the same ones we consider with any activity or enterprise – making gains, preventing losses, and, if that all goes well, taking advantages of other opportunities for 'wins'.

In the case of records management, the gains we are promised are based around efficiency, productivity, meeting compliance requirements (note that is only one of many benefits, not the end goal) – and equity, or fairness. In essence, RM should help us do our best work. In terms of the losses we can avoid by doing effective RM, they centre around protecting ourselves – by showing our working and keeping the history of decisions made when and by whom. It can keep us from getting into trouble – but sometimes this backfires pretty badly, as we will see below.

Other wins in records and information management are about telling our story – this is the domain of knowledge management, archiving, and business intelligence. These are more qualitative benefits, and not usually considered as critical by businesses. In government, these are usually seen as a stretch target.

What have we already done?

Government and industry came on board with records management a long time ago. When digital records management started becoming important, most agencies and organizations did a few things to try to get those promised benefits. To make some gains in the new digital frontier, we established some governance, bought an EDRMS, and trained everyone how to use it. This was meant to make us more productive and efficient. To avoid the pitfalls of digital disruption, we set up policies and rules, and told people they had to use the EDRMS or else. When this didn't really work, we started trying to connect business systems like SharePoint to TRIM or Objective.

Some of us have tried to hit the stretch targets, and overall there has been mixed success with big data, BI and knowledge management across the board.

> ... there has been mixed success with big data, BI and knowledge management across the board.

How much did this cost to do? A recent audit on the Department of Health pegged the EDRMS implementation at about $A5.5M, taking 9 years to get up. The audit also detailed the impacts on staff in having to learn how to use a new system and other impacts on the records management unit.

The cost of integrating systems with the EDRMS is typically about half again of the cost of implementation. About $A2.5M is a conservative estimate for SharePoint/TRIM integration, with a low overall success rate across government. Of course, integration has system impacts as well as cost impacts.

The cost of targeting those more qualitative gains is very open ended, but not usually cheap. Part of the reason is that we can't get good intelligence out of our data until we are managing it effectively in the first place – and despite all of this investment, most organisations still aren't.

The digital payoff?

Let's look closer at what we did and didn't get for our money and efforts. In 2016 Finance did a feasibility study into whole of government EDRMS, which had a user survey component. The survey found that, across the board, EDRMS implementations were not being used efficiently or effectively. There was a large impact on staff from being forced to work in EDRMS, which were designed for records managers, not users. After more than 10 years, RM in government is not realizing the promised gains.

How about using records management to protect ourselves from losses? There are two main deficiencies here. We know more about the deficiencies in Federal Government departments because the Australian National Audit Office (ANAO) has undertaken quite a few critical audits over recent years. These have consistently found across that time span, that:

- **Problem one** – agencies are still not managing most of their records – which means they have none of the promised protections for all of that information. Government is still exposed to losses from not managing our records in our key business systems.
- **Problem two** – even when we are 'managing records' in an EDRMS, we can't reliably find them. Records may be in the EDRMS, or they may be in business systems, or both. And when they are put into the EDRMS there's no guarantee we can find them again. ANAO found that only 18% of records put into the Health EDRMS were afterwards findable by staff. If we can't find our records of business, we can't protect ourselves.

Is this an isolated issue?

A review of ANAO audits, from just 2017 and 2018, shows 11 separate investigations that found deficiencies in records management. And all occurred in agencies that have formal RM governance and EDRMS – from PMC to Defence to Human Services.

Let's look a little closer at the first big problem, not managing our Business Information Systems (BIS). Under Digital Continuity 2020, all business systems must meet functional requirements for information management.

Most organisations have over a thousand discrete business information systems. Usually around a dozen systems will do the heavy lifting, and contain most of the records to support the work of the organisation. The usual suspects here are document repositories, CRMs, transactional line of business systems and email. These essential administrative and core business systems support the entire enterprise.

This top one percent of systems will usually hold the majority of business records. But the other 99% of systems, while not as ubiquitous, do still hold large amounts of essential evidence of business decisions, transactions, effort expended and outcomes.

The average agency has 142TB of digital records outside of their EDRMS. For context, the EDRMS usually holds less than 1% of the total of all digital records. According to the 2016 NAA Survey of Information and Records Management Practices in Australian Government Agencies:

1. Only a third of agencies are sentencing any digital records (including in EDRMS)
2. Only half of those are doing any disposition of those digital records
3. No agencies are doing any disposition of BIS records
4. Less than 20% of agencies have a plan for their BIS RNA records (around 53TB of them per agency).

Overall, we can expect over 14 million BIS records in an average government agency per the Survey – and they aren't being managed.

So what is stopping agencies and other organisations from meeting just the basic requirements?

Per the Survey, cost is a big issue, which makes sense when you think of the scale of systems that need to be managed, whichever option is used. Technical barriers are also a problem, which are hard to overcome using the four current Business Systems Assessment Framework options.

(Continued over)

Finally, a combination of staff capability and organisational culture are acting as impediments. This will always be a problematic area where negative impacts on users are expected. Let's look at Problem 2 – we can't find the records that we actually are theoretically managing. The ANAO report from Health found that after spending the money, and nearly a decade in planning, evaluation and implementation, users still couldn't find most of their records. A lot of records didn't make it into TRIM, which goes back to Problem 1, but even the ones that did then effectively disappeared. If over 80% of the records you put into an EDRMS are never to be seen again, and if it takes inordinate effort to find the less than 20% that you can locate, you haven't had a win here.

Real life consequences

So what's the real world impact of all of this? Does it matter if we aren't managing all of our record holding systems? Does it matter if we can't always find our information?

Perhaps after years of living this reality, the average user inside the organization gives up caring. Life goes on, we all keep working, the wheels keep turning. But what happens when we look outside of our organisation, at who is affected by our actions, or inactions? We can better see outside our own four walls if we reflect on the cases of Vivian Solon and Cornelia Rau.

Vivian Solon was found in a park in Lismore in 2005 with head and possible spinal injuries. She was taken to hospital, where someone suspected her of being an illegal immigrant, for unknown reasons, and reported her to DIMIA. DIMIA officers ran with this assumption, and deported her, even though she told them she was a citizen, and even though there was a missing persons alert out for her.

The Comrie Inquiry looked into the circumstances, and found that information identifying Vivian, that would have prevented her deportation, was in TRIM. The officers didn't find them by searching, so assumed they weren't there. DIMIA had the records, and they were managing them – but they couldn't find them.

After a TV special aired, an officer recognized Vivian and did some more searches, and did find the connection The officer reported it to their supervisor – who did nothing. Another officer found the same thing and reported it to the supervisor – who still did nothing. There was plenty of evidence of these searches, and communications, that implicated the supervisor in this terrible action. So overall, the records management situation did nothing to help DIMIA to 'do its best work', but did do a lot to get it into trouble. You will recognize this as the opposite of the benefits we were told to expect from records management. This wasn't the only instance of RM issues at DIMIA having catastrophic real life impacts.

Cornelia Rau was picked up by the Queensland Police on the Cape York Peninsula in 2004. She gave conflicting accounts of who she was, and where she was from. She didn't give Police her real name. She was eventually detained as a suspected illegal immigrant, even though the German consulate had no record of her. Her identity was only discovered after a newspaper article was published, and her family in Victoria, who had been looking for her, saw her picture.

The Palmer report found that searching for information, and in fact the aggregation and linking of information, was ineffective. The staff at DIMIA had assumed that the fact that they couldn't find anything on 'Anna Schmidt' or 'Anna Brotmeyer' didn't mean much. If the search facilities had been more connected, and more reliable, they would have flagged that this woman wasn't who she said she was, and done more investigation.

The Inquiry Recommends ...

The inquiries made two broad sets of records and information management focused recommendations, which were aligned with the two persistent issues presenting at DIMIA, and in fact across all agencies. Firstly, make records more findable. They proposed that this could be achieved by training people better, including training them to spell more carefully.

They also suggested some type of technical enhancement to support searching across systems. Secondly, to manage records in non-EDRMS systems more rigorously. They recommended linking records across systems, and even implementing a new BIS to manage records better through the lifecycle of a case.

Have these recommendations been effectively addressed? In the most recent ANAO audit, no substantial improvements were identified. The record-keeping across what is now Border Protection is still considered poor, users are still storing records (naturally) in line of business systems, and records in the EDRMS are still hard to discover. ANAO recommends – mandating use of the EDRMS. But there is no evidence that this will really help. Let's look at why not.

The Department has actually been trying. They take this very seriously, and many concerted efforts have been made over the last 10 years to address the systemic issues. But no ground has been gained, because of repeated failed remediation initiatives, lack of follow through, and the sheer scale of records and record growth. The department has forecast a cost of around $A15M to address its records and information management shortfalls, which has not been able to be easily found in its budget.

So – is this actually fair enough?

• Should we be spending $A15M+ on this type of problem?

• If we do throw good money after bad, is it smart to spend it on training thousands of people, again?

• Can we really roll all of our records of business, 99.5% of all our data, into the EDRMS?

• And if we do put 100% of our records in the EDRMS, will we effectively lose 80% of them?

• How is the business case overall? Does the cost and impact of doing all this actually result in a good payoff for us? Do we get ROI? Do we align with NAA and whole of government expectations?

I think the answer to all these questions is no. We can't spend that much money, and cause that much hurt, in the name of records management compliance. Our narrow focus on 'complying' by shoehorning records into a records management system, and overlooking the management of everything we can't squeeze into it, has already caused us a lot of hurt. What we are doing isn't working. Does this mean we just do nothing? We might say yes, if it wasn't for Vivian and Cornelia.

How can we do this smarter?

Firstly, let's understand the essential requirements for successful records management:

1. To create records in context: this means that the records about Vivian Solon in TRIM are connected somehow to the emails about her, the database entries about her, the documents in the shared drive about her, and even social media posts about her.

2. To manage and maintain records: the functionality required to ensure records do not lose their evidential value, for the duration of their lifespan. This evidence can hurt us if it shows we did the wrong thing – but it will help us if it shows we did the right thing.

3. To support import, export and interoperability: this means we can keep Cornelia Rau's records linked even when we MOG or re-platform.

4. To retain and dispose of records as required: this is the 'compliance' part. Just one element (but a very important one).

Rachael Greaves is Chief Information Officer (CIO) at Australian RM specialists and solution provider Castlepoint Systems. Rachael has extensive experience consulting on information, records management, security and audit across federal government.

ANZ Enterprises Lagging Behind on Digital

Australian (AU) and New Zealand (NZ) businesses are trailing behind their global counterparts with only 17% of businesses digitally mature enough to build disruptive business models at scale compared to a global cohort of 22%. That is one of the key conclusions from research undertaken by Infosys, the global consulting firm.

The research report released today, Infosys Digital Acceleration Study: Infosys Australia and New Zealand Report, polled 175 senior business decision makers from the region's biggest companies, each with a revenue of over $1 billion, to better understand where Australia and New Zealand's largest enterprises are in their digital transformation journey and what they require to accelerate that journey.

The survey of Senior IT decision-makers reveals that enterprise leaders across sectors are at varying stages of digital agility, while facing consistent barriers and opportunities to building disruptive business models at scale.

Interestingly, internal challenges rather than external market forces are cited as a major barrier to change with resourcing and legacy issues preventing organisations from making rapid progress. Organisational silos (38%) and transforming from a low risk organisation to an organisation that rewards experimentation (37%) are some of the most prevalent challenges cited by businesses, as well as hiring digital natives and building digital skillsets (38%).

Andrew Groth, Senior Vice President and Regional Head Australia and New Zealand, Infosys said, "What is apparent in this research is that business leaders know what they need, but often underestimate the full impact of digital transformation once you dig deeper.

"There is a skewed view of digital transformation, with 67% of respondents having a clear outlook on opportunities, and a considerably lower 50% having a clear understanding on threats. Interestingly, as businesses move to becoming digitally mature, there is a correlation between maturity and higher risk awareness, but we have some way to go in this market."

The report identifies three clusters based on digital maturity:

- Visionaries – Transform to meet business objectives through new business models and an innovative culture. They understand digital is central to the success of future endeavours
- Explorers – Committed to improving their customer's experiences. Identify with digital programs that enhance customer experience, or increase brand value through differentiation
- Watchers – Largely focused on efficiency-driven outcomes of digital adoption

Despite 72% of AU and NZ respondents identified as belonging in the visionary and explorer cluster, there is an overall sentiment amongst enterprise business leaders that their digital transformation journeys are not comparable at an international level.

When comparing themselves to global clusters respectively, slightly over half (54%) of AU and NZ visionaries perceive themselves to be globally ahead, while only 22% of explorers and a quarter of watchers (25%) feel globally ahead of peers. When compared to local counterparts, this perception is higher, with 62% of visionaries, 35% of explorers and half (50%) of watchers feeling ahead amongst their peers.

The survey has also revealed industries such as the public sector, healthcare and utilities report feeling most behind global counterparts, while logistics and manufacturing are the most confident.

Half of public service organisations (50%) feel their digital maturity is behind global peers, with only 7% reporting being ahead. Healthcare and telecommunications/utilities both report only 19-20% maturity. The retail industry reports a split, with 30% of respondents feeling behind, and 47% of respondents reporting maturity. Both logistics and manufacturing organisations feel comfortable, with 80% and 93% respectively reporting digital maturity on par or ahead of global counterparts.

For a full copy of the report, visit https://www.infosys.com/navigate-your-next/research/AusNZ


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How to create a simpler Records Retention Schedule

By Frank McKenna CEO, Knowledgeone Corporation

Records Retention is about risk management. It is the records manager's duty to ensure that he/she protects his/her employer from risk. The basic principle should always be "Keep records for the shortest time allowed and then dispose of them." This ensures that the company/agency will be able to meet its compliance requirements but not be compromised by the Discovery or eDiscovery process by retaining records for longer than is absolutely necessary.

Test	High	Medium	Low	Not
How likely is it that we will need access to these records again?				
How likely is it that there would there be serious consequences if we could not access these records in the future?				
How high would the cost be to retain these records?				
How likely is it that we will need these records again for research purposes?				
How likely is it that these records will have historical value?				

Here is an example of a simple tool to help you evaluate the value of records:

If you can prove that you have a formal retention schedule in place and have consistently followed it then the risk of legal action, penalties and 'senior executive embarrassment' is minimized.

Retention scheduling is the act of pre-determining the life of a record in each stage of its lifecycle. This is part of the Continuum Model of records management; managing all records from creation to disposal.

When creating a Retention Schedule, it is important that you are fully cognizant not only of your organization's business requirements but also of any industry, federal, state and local government mandatory legal requirements. A Retention Schedule contains one or more Retention Codes.

In most cases, a record is either active (in use, current and referenced), inactive (some organizations store inactive records on site for a specified time), archived (retained, usually off-site) or destroyed. The end-of-life can only be archived or destroyed.

As we will see, the life we assign to a record depends upon its value to your organization and your legal responsibilities.

In all cases, your prime objective as the records manager should be to make your Retention Schedule as short, as easy-to-understand and as easy-to-use as possible. As a 'rule-of-thumb' if you have more than 100 Retention Codes in your Retention Schedule, you have too many.

Sample Records Inventory

Contents		Details & Examples
Date Inventory Prepared		July 7, 2018
Person Responsible for Inventory		Name, title & contact details
Person Responsible for Records Series		Name, title & contact details
Records Series *#number/identifier*		AP2003
Location(s)		5th Floor, Room 5, 32 Main St
Title		Accounts Payable Series
Description/Class		A collection of accounts payable records including invoices, purchase orders, delivery slips, payment advices, etc.
Records from and to dates		July 1, 2003 to June 30 2004
Size/Volume		2,200 file folders approximately 100 pages per file folder
Medium		Paper
How Filed		In compactus, cardboard file folders
Estimated growth percentage per annum		5 percent
Status %	**Active/current**	25
	Semi-active	25
	Inactive	50
	Archived	0
	Other (explain)	List any Vital Records
	Final disposition	Destruction, Secure Destruction, Archive
Security	**General**	
	Restricted	To Company accountant & CFO & staff
	Secure	
	Other (explain)	List any under a legal hold
How long should it be active?		One year
How long should it be semi-active?		One year
How long should it be inactive?		Two years
Disposition. Should they be archived or destroyed at end of life?		Secure Destruction
Custody. Who holds these records?	**Active**	AP
	Semi-Active	AP
	Inactive	Iron Mountain
	Achived	Iron Mountain
	Destroyed	Iron Mountain
Existing Retention/Disposal Schedules		List any that apply and provide details
Existing Business Classification Systems		List any that apply and provide details
Existing Citations		Any Acts of Parliament that apply

What do we need do to before developing a Retention Schedule?

1. Determine the major organizational functions; research your organization charts and corporate goals and objectives. The website is usually a good place to start. What does your organization do and how are the various functional units organized? (e.g., Sales, Marketing, Manufacturing, Purchasing, etc.)? You need to understand and document the major functional areas of the business BEFORE you can create a Retention Schedule.

2. Develop a Records Inventory for each functional area and each Records Series.

3. Research your industry for all necessary compliance requirements. Talk to your corporate lawyers, risk and compliance managers (if you have them). Google compliance requirements for your industry. Ask the manager responsible for each Records Series.

4. Prepare a list of all the mandated retention periods you discover (i.e., what legislation does your organization have to comply with, e.g., Retain financials and tax records for seven years). Link these to the appropriate Records Series.

5. Analyze your records as to their 'value' to your organization. For example, none, moderate, important, very important, vital, historical value, research value, etc.
Ask of each Records Series, what is:

a. its operational value – supporting business activities and processes

b. its legal value – compliance and contractual support

c. its fiscal value – evidence of financial transactions

d. its research value – Is it important research we need to preserve?

e. its historical value – does it have enough long-term value to be preserved?

If you don't understand the value of a record to your organization you can't develop its Retention Code. Importantly, when building your Records Inventory [1] ask each person responsible for the Records Series how important these records are and how long they would like to see them retained.

(Continued over)

[1] Also make them aware that there is a cost to retaining records and that this cost must be justified. In a major western city, floor space probably costs $A800 per m² or more. Store too much paper on site and you will be paying for more office space than you should be. There is a significant dollar opportunity cost associated with storing records in the office.

The Records Inventory

In order to effectively manage your records, you first need an accurate record of what you have; your current records holdings. We call this a Records Inventory.

Please remember that a record is any evidence of any business activity and that it can be in any form, e.g., paper, electronic document or email. Records may be on shared drives, in file folders on shelves, in cabinets or stored in boxes in your basement or at an off-site records centre in boxes or in your email server.

The Records Inventory becomes a detailed listing of all of the records an organization has and can be used as the foundation of your Records Classification and Retention Schedules.

The general format of a Records Inventory will be as in the Sample on the previous page (you will need to amend this to suit your organization's requirements and holdings): Repeat the same schedule for every Records Series found.

The Record Lifecycle

When you manage a record from creation to its final disposition with a Retention Schedule, you are managing its lifecycle.

There are usually only four stages in a record lifecycle, for example:

1. Active
2. Semi-active
3. Inactive
4. Archived or Destroyed

Your organization may have more or less and each Records Series may have more or less.

Triggers

In your Retention Schedule you need to determine the action or 'trigger' that transitions a record from one stage to the next. Examples of normal triggers are:

- One-year from creation date
- Two-years from last document added
- Five-years from being declared inactive

In the above example, a record would move from active to semi-active to inactive and then either be destroyed or moved to long term storage. Each 'move' would be initiated by a specified trigger.

[3] If you are intent on creating a simpler/smaller Retention Schedule it is important to keep the number of unique triggers as low as possible.
[4] Note that a single Records Series may require multiple Retention Codes. It is important to try to keep this number as low as possible by rationalizing and combining 'similar' codes.

If combining two or mode codes into one, always use the one that generates the longest record life.
[5] Please make sure that the trigger is definite, easily understood and easily actioned as in the above examples. Please don't use conditional triggers that require evaluation and interpretation by an 'expert'. Make it an easily executed and non-ambiguous rule; keep it black and white. Use common sense, it must be something that is easily automated. If it requires human intervention and a decision, it is unsuitable.
[6] PLEASE use Excel to develop your Retention Schedule not Word. Retention Codes developed in a common format in Excel are far easier to sort, rationalize, modify and import into an EDRMS than those developed in Word.

Analysing & Simplifying your Retention Codes

The objective here is to use common sense to rationalize all of the Retention Codes you have developed in your work to date.

For example, if you have multiple Retention Codes with the same disposition but that vary in lifecycle only minimally (e.g., 4.5 years, 5 years, 5.5 years), rationalize them to a single Retention Code (the one with the longest lifecycle, e.g., 5.5 years).

If you have followed our advice and used Excel to develop your Retention Schedule you will find it very easy to sort and group your Retention Codes into orders such as total lifecycle, Disposition, etc.

Once sorted, step one is to remove any duplicates and step two is to combine 'similar' Retention Codes as described above.

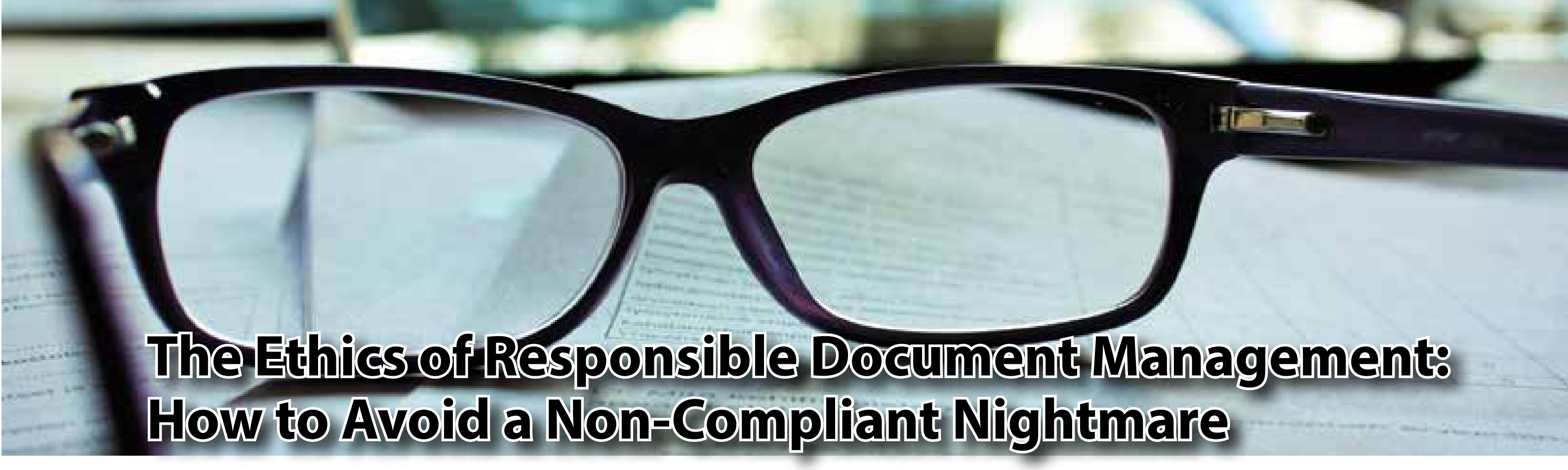
[7] When combining or rationalizing periods ALWAYS take the longest period as your new default. That way, you will meet all compliance requirements.
[8] Sanity check; do you have more than 100 retention codes? If so, return to step one and step two until such time as you have 100 or fewer unique Retention Codes. Common sense is your best friend in this operation.

Frank McKenna is CEO of Knowledgeone Corporation, the Australian developer of Enterprise Content Management application software. www.knowledgeonecorp.com

Create your Retention Codes for each Records Series

Simple Example: Accounts Payable (AP) (Invoices, Goods Receipts, Purchase Orders)

Stage	Location	Trigger to move to next Stage	Next Stage
Active	AP File Shelving	One-year from Created date	Semi-Active
Semi-Active	AP Compactus	One-year from Semi-Active date	Inactive
Inactive	Iron Mountain	Seven-Years from Inactive date	Destroyed
Destroyed	Iron Mountain		
Archived			



The Ethics of Responsible Document Management: How to Avoid a Non-Compliant Nightmare

By Tim Osman

Regulatory compliance is a huge concern for companies in many industries, but the cost of failing in compliance efforts can be an even higher concern. Penalties, fines, loss of business, loss of client confidence, and even outright theft of confidential financial information can quickly add up and take a heavy toll on your business.

Increasingly, document management strategies are found at the centre of compliance efforts. Since so many of these regulations are targeted at ensuring the security and privacy of personal information, having the proper strategy in place is crucial. Implementing a responsible approach to document management not only makes compliance easier, but also ensures that companies are adequately protecting their customers' information.

Look no further than the healthcare industry to get an idea of the adverse effects of a poor document management strategy. According to the Notifiable Data Breaches Quarterly Statistics Report from the Office of the Australian Information Commissioner (OAIC), the largest source of reported data breaches was the private health service provider sector (health sector) accounting for 20% of breaches that occurred from April to June of 2018.

About 50% of all breaches included personal financial information, and almost all included contact information such as email addresses, phone numbers, and home address.

Recently, hackers breached the Singapore government's health database with a "deliberate, targeted and well-planned" cyber attack that lasted almost a week, accessing the data of about 1.5 million patients, including Prime Minister Lee Hsien Loong.

According to a survey conducted by the Ponemon Institute in 2016, half of all healthcare organizations had little or no confidence in their ability to detect the full scope of patient data loss or theft, and half were unsure if they could sufficiently prevent or detect unauthorized patient data access or theft.

The threat of a data breach and its subsequent fallout are a driving force in the growth of the medical document management market. Research firm HTF expects the market to grow at a CAGR of 15.5 percent from 2016 to 2023, reaching $US789.9 million.

Secure Document Management

Document management solutions are one of the primary ways businesses can address these security and compliance issues, while also giving organizations more visibility into where documents are, who is using them, and whether or not they've been compromised.

Effective document management can help lock down documents and protect all the data flowing into an organization by combining both paper and digital document streams.

By digitizing paper documents as soon as they arrive at a facility, organizations can better manage and track information. Also, this allows organizations to reduce the possibility that the paper documents will be lost, misfiled or compromised.

This process can provide significant savings when it comes to administrative costs because documents can be centrally stored and accessed without having to physically move them to other departments and store them in a file cabinet. Most document management solutions also provide functionality that can allow companies to see who has viewed or signed these digitized documents.

This approach to digital document management also makes it easier and less costly to access and retrieve documents at a later time. There's no more searching through full filing cabinets, cluttered desk drawers, or bulging boxes. In addition, documents are more secure because businesses can internally track which employees have viewed the documents using sign-in credentials. This is an important feature, as the number of internal data breaches continue to rise.

In fact, document access can be limited or controlled internally more easily when using a digital document management approach. Applying permissions to the documents can ensure information security and make it easier for external auditors to confirm you are following regulations or best practices.

In some industries, allowing certain employees to view particular types of content can lead to violations or penalties. Permission-based access greatly curtails those problems and helps ensure customer or patient privacy.

Advanced document management also makes it easier to manage the metadata associated with documents and files. This not only makes it easier to search for and locate files, but also can be used to classify data for regulatory and legal purposes. Accurate meta tagging – which can be automated using document scanning and management solutions – can greatly relieve the information gathering burden of an audit and help organizations gauge their own compliance internally.

While there is a cost to deploying new document management technology, the costs of a failed compliance audit or a data breach are even higher. According to Ponemon's research from 2017, the average cost of a data breach is now $US3.86 billion, with an average cost per record of $148. Half of healthcare CISOs admit having suffered a security breach in the last 24 months, according to new research that not only highlights the poor state of information security in healthcare organisations, but warns attackers are have gained the upper hand using machine learning (ML) and artificial intelligence (AI) tools.

Just a third of organisations responding to a recent member survey – conducted by the Health Informatics Society Australia (HISA) within its Cybersecurity Community of Practice – said they performed a cybersecurity risk assessment at least annually, while only 65% had a formal business or governance plan that included managing cybersecurity issues.

Don't be left vulnerable. By implementing a solid document management process, your company can both ethically and responsibly track the path and lifecycle of your documents, increase the security of who can access those documents, and decrease the chances of a data breach or a hefty non-compliant fine.

Tim Osman has been with OPEX Corporation, a global leader in document scanning solutions, since 2008. He currently serves as the Director of Marketing.

GDPR Transborder data flows: How are A/NZ organisations affected?

By David Cauchi

The General Data Protection Regulation (GDPR) applies a strict regime when personal data is transferred outside EU territory. In principle, it requires that an equivalent level of protection and safeguards are still afforded to such data, when this is processed outside European soil.

In addition, the GDPR also aims to protect EU citizens' data by applying a wider territorial scope whereby, non-EU entities offering goods or services, or monitoring the behaviour of individuals based in the EU, will also be subject to the GDPR.

The impact on Australian and New Zealand entities is two-fold since this implies that:

1) An entity based in Australia or New Zealand, offering goods or services to individuals in the EU, will be required to comply with the GDPR, apart from its own national jurisdiction; and

2) Australian or New Zealand entities on the receiving end of data transfers from EU entities would be required to ensure equivalent protection.

Adequacy findings

In the case of New Zealand, the EU has recognised such jurisdiction as ensuring an adequate level of data protection . Indeed, adequacy decisions are one of the possible solutions for data transfers.

These decisions are based on a detailed assessment of the data protection adequacy in the third country, and on the principle that such country provides sufficient guarantees which are essentially equivalent to those in the EU.

An adequacy decision removes any barrier for data transfers to such jurisdictions or sectors. In the case of New Zealand, such adequacy finding implies that personal data may freely flow from EU to New Zealand without any additional transfer instrument or safeguard being necessary (e.g. additional contractual clauses or binding corporate rules).

The decision, which was issued by the European Commission on the basis of the Directive 95 /46EC, remains valid until reviewed, amended or repealed under the GDPR.

The situation is different for Australia, since no adequacy finding has been made. Therefore, in spite of having a robust data protection regulatory framework, Australian controllers and processor would need to ensure that personal data remains subject to the same level of data protection as afforded under the EU regime.

In general, these safeguards may be put in place by using Standard Contractual Clauses issued by the Commission, which are signed between the EU and the Australian entity, involved in the data transfers, or by applying Binding Corporate Rules.

Other possible options to frame transfers within the legal boundaries, would be the transfer based on a certification scheme or code of conduct. These two are both novelties under the GDPR and one will need to assess how they will work in practice. Another possibility is to rely on derogations provided in the GDPR.

However, while this is a possible option, derogations are considered the exception to the rule and should be narrowly interpreted. In principle, relying on derogations should only take place in limited circumstances (e.g. one-off or urgent transfers) when it is not possible to resort to other safeguards.

Transferring by means of appropriate safeguards

Standard Contractual Clauses are model contracts adopted by the EU Commission with the aim of facilitating EU controllers in providing sufficient guarantees when transferring personal data to a non-EU controller or processor.

EU data controllers typically use these standard clauses either as ad hoc contracts or as part of wider Service-Level or business related agreements, both with other intra-group entities, or with external organisations based outside EU.

Binding Corporate Rules (BCR) are a set of internal rules designed by multinational organisations to regulate the transfer and subsequent processing of personal data within group entities including those located outside EU territory. The significant advantage of BCRs when compared to Standard Contractual Clauses, is that once a BCR is approved by EU Supervisory Authorities, this implies adequacy of the data protection framework adopted by a multinational, thus implying that personal data may freely flow within the group without requiring additional safeguards or formalities.

The Australian scenario

Thinking from the Australian business perspective, a multinational having establishments in the EU would need to ensure that its data flows from its EU-based entities to Australia or other third-country jurisdiction complies with the GDPR.

If similar data flows are of a frequent nature and involve the majority of organisations across the group, then the most practical option to be considered is BCR. Although the approval of a BCR would trigger a procedure involving the EU data protection authorities, once that a BCR is approved, this would facilitate the free flow of personal data amongst the group entities covered by such authorisation.

In order to launch such procedure, the Australian multinational should identify the EU lead data protection authority where such BCR should be filed. The criteria for establishing the lead authority are principally, the EU Headquarters or the place with delegated data protection responsibilities.

Embarking on a BCR authorisation involves a procedure whereby following the reviews conducted by the lead and concerned supervisory authorities, the BCR application would then go through the consistency mechanism envisaged under the GDPR, whereby an opinion of the European Data Protection Board will be necessary.

Alternatively, if the transfer is ad hoc or a quicker, albeit individual, solution is needed, an Australian multinational may consider the use of standard contractual clauses to regulate data transfers between its EU-based entities and their third-country receiving entities. This would solve the matter for the short-term but the use of BCRs would be ideal to deal with data transfers on a long-term basis.

More information and guidance on how to comply with the GDPR can be found in the author's publication – A Practical Guide to GDPR. https://itsmshop.co.uk/product/a-practical-guide-to-gdpr/

A look into the future with Alaris

IDM recently sat down with Interview - Leonel Da Costa, Managing Director Asia Pacific Region, Kodak Alaris, Alaris Division, to learn about changes at the information management solutions vendor. The Information Management division of Kodak Alaris, a leading provider of information capture solutions that simplify business processes, is now known as Alaris.

IDM: Kodak Alaris recently announced that its Information Management division would operate under the name 'Alaris, a Kodak Alaris business'. What does this announcement truly represent?

LDC: We commenced the repositioning of the Kodak Alaris Information Management business last year with the launch of the Alaris Partner Program, Alaris Capture Pro Software and the Alaris S2000 Series Scanners.

The idea behind transitioning to the Alaris brand gradually is that in many markets the Kodak brand is traditionally very strong for scan and capture, while for some the only knowledge of the brand that they have is from the Kodak photographic company.

To balance the needs of our partners and end-users across many geographies, we don't want to make a change like this immediately too quickly.

IDM: Alaris' offering includes scanners, software and services. Where are the major growth opportunities?

LDC: I don't think the high growth opportunity is in standalone scanners or software products, it is definitely in complete solutions that combine Capture Pro Software with our scanning hardware, plus OCR, plus Robotic Process Automation (RPA). This is the great opportunity today.

IDM: Is there a long-term future for information capture from paper?

LDC: Yes, I am very confident there is. Our key differentiator lies in the image enhancement capabilities built into all of our scanners (whether they are Kodak-branded or Alaris-branded).

This can dramatically reduce the time spent handling documents and can deliver more accurate information to automated workflows. It is the reason why so many ISVs are coming to us to take advantage of Alaris' advanced image science capabilities.

IDM: In 2017 the company announced a new Alaris Partner Program . What is the state of this program in the APAC region and have there been changes to your channel?

LDC: Channel expansion is an integral part of our growth strategy. We have been working progressively across the globe and China and India were two regions we initially focussed on in 2017. We are now turning to the South-East Asia region and Australia/New Zealand in 2018.

The channel is a major priority for our new ANZ GM of Sales, Angelo Krstevski, in 2018.

A new Partner Relationship Management portal will be rolled out over the next few months to enhance our support for existing local partners. Angelo will also be actively seeking to bring on more new Systems Integrators (SIs), value added resellers (VARs), independent software vendors (ISVs) and Business Process Outsourcers (BPOs) as partners in 2018.

We are presenting a new face to the market in response to the rising emphasis on Digital Transformation in all industries today which is driving this expansion and providing an opportunity for Kodak Alaris to grow.

IDM: It has been reported that more than 90 percent of the Alaris business unit's revenue comes through resellers or distributors. Is that changing?

LDC: The reality is actually higher and our business is done 100% through partners, there are no plans for the company to sell direct. But we are looking to refresh and re-train our existing partners and steer them towards a solution-oriented approach.

"We are presenting a new face to the market in response to the rising emphasis on Digital Transformation in all industries today which is driving this expansion and providing an opportunity for Kodak Alaris to grow."
- Leonel Da Costa, Asia Pacific Sales Managing Director IM at Kodak Alaris

IDM: Managed Content Services (MCS) were also announced in 2017. Has MCS been launched in this region? If so how does this work?

LDC: This is something that was begun in Europe in 2017 as it complemented our existing partnerships with some MFP vendors that also sold Managed Print Services. We are looking to develop similar relationships in this region in 2018 and expect to make announcements over coming months.

Our Managed Content Services provides a solution that can give you a better understanding of your total imaging costs, provide control across your entire capture infrastructure, enhances efficiency and effectiveness, improves Service Level Agreements (SLAs) and drives real sustainable savings.

We will provide vendor-agnostic maintenance and life-cycle management of legacy devices, along with custom repair and maintenance and professional services.

IDM: What changes do you see for the rest of this year, in regards to the company overall?

LDC: The market has responded overwhelmingly positively to the Alaris S2000 Series launch and the intelligence that was incorporated into the S2000 A4 products. You can expect to see these features incorporated into our other A3 scanner lines over time.

Kodak Alaris is still market leader in Australia and New Zealand for Production scanners (44% revenue share, 52% unit share in 2017 according to analysts) and we are now looking to replicate this in the broader Distributed Capture market

The market is moving from centralised to decentralised scanning so the ability to enhance ease of management in these scenarios will be increasingly important.

As a way forward, we are looking at optimising our solutions and ensuring maximum geographical coverage by getting more partners across the globe to support our efforts to accelerate digital transformation for the customers we serve.

How to Stop Filing Cabinets Going Feral

Staff have been disciplined and new security procedures introduced at the Department of Prime Minister & Cabinet (PM&C) following a report into Cabinet papers security breach of 2017.

A Review of the Department of the PM&C's security procedures has a suggested a series of initiatives to ensure that surplus filing cabinets brim full of sensitive documents do not end up in Canberra second hand furniture dealers in the future

These measures will continue to be necessary as the report emphasises that "Despite the digital transformation underway, PM&C cannot rely on digitalisation of every task it performs to reduce the reliance on paper documentation. Individual preferences, habits and in some cases, Occupational Health and Safety factors, will continue to require classified information to be created, printed and stored in traditional ways."

PM&C is transforming the way Cabinet documents are distributed via use of its new digital CabNet+ viewer for Protected level Cabinet documents (including Exposure Drafts, Drafts, Finals and Minutes).

However, the report notes, "While these measures considerably mitigate against the risk of staff storing large volumes of physical Cabinet documents in secure containers unnecessarily, they will not prevent them from creating and storing the associated working documents (e.g. drafting suggestions, briefing notes, etc.) outside the CabNet+ viewer and beyond their effective working life.

In future, the report has suggested that "Consideration should be given to whether secure containers should simply be destroyed, that is transferred to a scrap metal dealer, with drawers removed, rather than passed to agents for public sale at the end of their useful life."

Other proposals include:

• Filing cabinets should stay put in one location and not follow staff as they move around PM&C's three offices in Canberra and a network of Regional Manager Offices and subregional offices within the states and territories (The Department now has some 2,200 staff located in more than 100 locations, and a visiting presence in some 200 other locations across Australia)

• Before staff transfer they destroy all physical documents under their control or formally pass responsibility for remaining documents to someone else.

• When filing cabinets are moved or disposed, someone should check they are unlocked and take a look in each drawer

• There should be a central register of filing cabinets

• The 'clear desk' policy required in the Department's Protective Security Plan should be enforced, and security staff clearly mandated to record and report breaches.

"During the Review, Security staff confirmed that there is in fact no financial return to the Department from the present disposal practice – while the containers are removed at no cost to the Department, they are not actually bought by the company removing them. Some agencies consign their unwanted secure containers to scrap metal dealers rather than public sales, though it still requires drawers to be open of removed at the point of disposal."

The Australian Federal Police (AFP) report into the incident found that the unauthorised disclosure resulted from a culmination of human errors in the record-keeping, movement, clearance and disposal of document storage containers by PM&C in February 2016. In particular, the AFP found that the breach was not a deliberate act motivated by criminal or malicious intent. The AFP report will not be made public.

PM&C has confirmed the material obtained by the ABC contained around 300 documents, which were largely collated between mid 2013 and mid-2014 as part of the official business of Cabinet Division (with the majority being working documents relating to FOI and other access requests). While half of the documents were classified Protected or below, there was a small amount of National Security classified material. These documents were not collated for the core purpose of the conduct of Cabinet business nor were they official Cabinet records. They were documents which related to a niche area of Cabinet Division's responsibilities.

The AFP investigation established that the documents are likely to have left the control of PM&C between January and March 2016, following a Cabinet Division accommodation reshuffle in January 2016 when eight secure containers were identified as surplus and returned to Corporate Division.

PM&C has concluded that the secure containers were not checked to ensure they no longer held any documents. PM&C email records indicate that two secure containers in Cabinet Division – formerly used by the officer, or officers, who collated the documents – were missing keys at the time they were being prepared for disposal. There is no record that the containers were opened and checked prior to disposal.

The (AFP) investigation concluded that 'the catalyst for the documents being made public is attributable to a culmination of human errors in the record keeping, movement, and clearance and disposal of document storage containers by PM&C rather than a deliberate unauthorised disclosure'.

PM&C says it has completed a full filing cabinet audit and each has now been given a new sequential reference number, and a unique asset identifier barcode and transferred to a digitalised asset register that will record the names of officers with access to the container.

"A new online application (Service Now) process has been implemented to manage requests for new secure containers, their relocation and disposal. This will significantly improve reliability, auditability and tracking of information over the entire life cycle of secure containers."

It has promised to undertake a further review after 12 months to confirm that the agreed recommendations in this Report have been implemented and, to the extent possible, to measure their effectiveness.

Data power to the people

By John Riccio, PwC Australia

The Australian Federal Government has committed $A45 million to establishing the Consumer Data Right. Giving the control of data back to the consumer presents an opportunity for business to add value to those who share with them.

Among the announcements from Australia's federal treasurer Scott Morrison at this year's budget was a commitment to put the power of data back in the hands of consumers.

Amid a swag of tech-related spending, including $A2.4 billion on technology infrastructure including investment in AI and machine learning, the government pledged $A45 million over four years to establish a Consumer Data Right, originally flagged last year through a Productivity Commission Inquiry on competition in Australia's financial system.

Running alongside the Open Banking Regime, which will make it easier for customers to access their financial records and transport it to another provider, the government signalled a financial commitment to transforming the way data is handled in Australia – following suit on the impending arrival of the EU's General Data Protection Regulation . The overhaul is a long time coming. The new system is designed not only to empower consumers, but enables them to share their data with businesses that can then use that data to offer more tailored products and services. This concept was explored in a paper by PwC together with Australia Post and QUT, Identity 3.0 The Platform for the People back in 2015 .

We know that customers want to connect with brands, but high profile cyber attacks that have stolen consumer data have made people wary about how much they share (as well as raising questions about data's intrinsic value).

Identity 3.0 is the stage in the evolution of data management when a consumers' digital identity is taken out of the hands – and control – of corporations and placed into a centrally managed platform owned by the user. They can then control, curate and cultivate it as they like. The paper argued that the digital economy had reached a level of maturity that could facilitate this next version of digital identity, and the treasurer's announcement emboldened that notion, as part of a broader $65 million spend on reforming Australia's data system.

According to the 2018 budget documents, establishing the Consumer Data Right will "give consumers greater control of their personal data and the choice to direct businesses to share [their data] safely with trusted recipients, who in turn will be able to offer better deals through innovative products and comparison services".

We know that customer experience must sit at the heart of any business strategy and be the core of any digital transformation. The 'always on' customer is driving much of the transformation in the marketplace – customers are pulling product, rather than manufacturers pushing it. If their needs are not met, they'll go elsewhere, and there is no shortage of competition.

The addition of data laws and entitlements, which are following a global wave of regulation on how data is handled and used, should not be seen as a hindrance to doing business, but as an opportunity to add value. For example, organisations that understand their customers' needs can address issues before the customer raises them, and businesses can predict changes in a user's attributes or habits and intervene to improve retention. If a customer is willing to share that data with a business, the organisation must ensure that it gives back in the form of added value. At the end of the day, it's all about experience .

Insight Engines adds NLP

Insight Engines is launching the company's version 3.0 product, combining two key components: Insight Investigator and Insight Analyzer. Together, these offerings use natural language processing, machine learning, and expert knowledge to detect data gaps, ask high-value questions, and give recommendations based on industry intelligence and activities.

"Security teams are mired in systems and approaches that are holding them back from being as effective as they want to be," said Grant Wernick, CEO of Insight Engines.

"Companies are throwing a tremendous amount of money at the problem, yet virtually nothing has changed since the Equifax breach a year ago. We have to completely change the game by using machine learning to amplify human intelligence (i.e. knowledge, intuition, and creativity) in investigating and mitigating threats."

Insight Engines' latest product offerings, Insight Investigator and Insight Analyzer, solve three key problems:

• Organize disorganized "landfills" of log data. Renders invisible or obscured data open and transparent, helping analysts know exactly what they have–and don't have–in their logs.

• Maximize security teams' capabilities. Empowers anyone in an organization–not just the highly-specialized technicians who are in short supply–to ask questions of their data and get timely answers.

• Augment human intelligence (HI) to help analysts ask better questions. Analyzes and distills industry trends and activities to provide smart recommendations for questions and deeper avenues of investigation.

Insight Investigator uses patented natural language processing (NLP) technology so security analysts of all levels can ask questions of their machine data through English language search, instead of learning highly-specialized and complex query languages.

This enables organizations to discover the value of their machine data by asking intelligent questions that go beyond traditional static security frameworks and raw searching, both of which are time consuming and likely incomplete.

Insight Analyzer enables customers to understand what data they have, how it's organized, and what questions that data can and cannot answer.

Insight Engines' new product is architected for customers to get the best of both worlds: on-premise security with cloud-enabled intelligence.

www.insightengines.com

SAP embeds Predictive Analytics

SAP has launched the application edition of SAP Predictive Analytics software to help enterprises create and manage predictive machine learning models for applications that run business activities, including supply chain, finance and accounting, human capital management and customer management.

Codeveloped with Accenture, the application edition embeds predictive and machine learning capabilities in enterprise applications, putting powerful data-driven insights at the fingertips of every business user.

Once embedded, the application can independently manage the end-to-end lifecycle of predictive and machine learning models that can adapt automatically to changing business conditions.

It provides enterprises with the flexibility to add, modify and extend predictive and machine models within these applications to solve new problems.

With a single click, users can easily automate the retraining,

coring and deployment model. The ability to provide valuable business insights is accomplished through machine learning libraries in the SAP HANA business data platform.

Users can take data in SAP S/4HANA and build predictive models that can be integrated into the application to understand predictions under changing variables and relationships.

WordStat 8 Democratises Text Mining

Provalis Research has announced a new version of its WordStat text mining software, which now features an Explorer mode allowing inexperienced users to quickly analyse many documents and identify the most frequent words, topics and phrases.

In Explorer mode users may also apply a categorisation dictionary to find specific themes. WordStat 8 uses a faster topic modelling protocol based on non-negative matrix factorisation. It produces topics with words and phrases and provides suggestions for additional expressions, spelling corrections and potential exceptions for better measurement of concepts.

With case sensitivity support, Regex pattern searches (Regular Expression such as email addresses or postal codes) or new substitution techniques, the customisation and sharing of the categorization process is easier and more precise.

WordStat exports text analyses to Tableau Software to prepare additional visual presentations. For better data visualisation, WordStat 8 introduces new graphs such as doughnut charts, 100% stacked bar charts and polar charts. A new radar chart and improved interactive word clouds allow for quick assessment of the relationship between a variable and selected keywords or phrases.

WordStat has an open interface with numerous solutions and directly imports and creates projects from Windows File Explorer, Excel, Word, PDF, Stata, CSV, social media, web survey platforms, and reference manager tools. To speed up the data analysis, WordStat 8 allows data analysts to pre-process or transform text documents using Python scripts. WordStat can still be run as a content analysis tool within QDA Miner, Stata or SimStat.

"WordStat 8 has amazing depth," says Dr. Grant Blank from the Oxford Internet Institute of the University of Oxford.

"WordStat can easily display individual text segments, reveal synonyms for individual words (along with frequency counts), do a correspondence analysis, show frequency tables, and demonstrate how topics relate to other coded text or variables," added Blank. To access the complete capabilities of WordStat you can effortlessly switch from "Explorer" to "Expert" mode from the main menu.

For a complete list of the new features of WordStat 8, refer to the What's New page, watch the new features video or download the 30-day free trial. To schedule a demo of WordStat 8, contact sales@provalisresearch.com

NLP technology poised to unlock the value of healthcare data sets

In the span of 10 years, healthcare organisations have gone from having very little information available for data mining to nearly drowning in vast and complex digital information.

Simultaneously, the effort required to enter and clean the data has been unsustainably high, affecting clinician morale and analysts' ability to extract insights for improving population health. All that is about to change for the better, according to the latest Chilmark Research report, *Natural Language Processing: Unlocking the Potential of a Digital Healthcare Era*. Natural language processing (NLP) technology has advanced enough to automate and augment human processes for more interactive text and speech use cases without being limited by availability of structured data.

"Traditional clinical documentation practices are inefficient in an era when we have computing tools that can identify trends and insights in data never before imagined. As it stands now, much of what is captured does not result in data collection that can be readily repurposed for secondary use," according to lead report author Brian Edwards .

"We are rapidly approaching the limits of the potential insights to be gleaned from basic computable data available today, and the time has come for the industry to shift its focus to unlocking the data heretofore trapped in unstructured clinical notes."

Currently, NLP technology is largely used for front-end clinical documentation and back-end coding for claims submissions. The report groups emerging use cases into three categories: Those with a proven ROI and commercially available (such as speech recognition), emerging use cases primed for immediate impact under value-based care models (such as prior authorisation and risk adjustment), and next-generation technologies (such as ambient virtual scribe and computational phenotyping).

In addition to the discussion of a dozen featured use cases, the report also outlines the trajectory of NLP adoption, noting both drivers and barriers to adoption, and explains the various rule-based and machine learning methods used by NLP vendors.

Additionally, the report offers recommendations for HCOs in the process of adapting and implementing NLP solutions, including how to identify and analyse key performance metrics as differentiators when evaluating solutions. Finally, the report profiles 12 vendors, covering their representative technology, platforms, use cases, and services.

For more information, visit www.chilmarkresearch.com/reports

NICE Nexidia Adds Rosette Text Analytics to Enhance Search Speeds

Basis Technology today announced that NICE is integrating Rosette text analytics in Chinese, Dutch, English, French, German, Italian, Japanese, Portuguese and Spanish into NICE Nexidia to enhance analysis capabilities of webchats, emails, and other text-based customer interaction channels.

NICE empowers many of the world's leading organisations to improve customer experiences by harnessing the power of structured and unstructured data and turning it into valuable and actionable information that drive smarter decisions and improve business performance. NICE Nexidia helps uncover valuable insights about customer behaviour over their full journey with the enterprise, creating long-lasting relationships and improving business outcomes.

The text analysis provided by Rosette boosts NICE Nexidia's ability to provide insights from text-based customer interactions, allowing enhanced identification of areas for improvement in customer experience.

Rosette's base linguistics breaks text down into fundamental building blocks: identifying tokens, normalising words to their stems, and more to improve search accuracy and speed. The system will allow call centre agents using the NICE platform to find relevant information faster, improving efficiency.

"Effective contact centre agents need to be able to access the information that their customers are looking for in realtime," said Miki Migdal, President of the NICE Enterprise Product Group. "Rosette's sizeable language coverage and significant search enablement further augments the speed at which agents can find information, so that answers are always at their fingertips."

Agile Information Stewardship with Alation TrustCheck

Alation Inc. has announced the general availability of TrustCheck, a new set of features that aims to transform data governance practices. Alation TrustCheck introduces realtime data governance guardrails directly into the workflow of self-service analytics users.

TrustCheck users are automatically alerted to both constraints and best practices, leading to more timely, accurate and compliant analysis.

“Knowledge workers can’t (and won’t) continually break their workflow to look up terms, validate the correct application of policies, discover impacts, and ensure data quality,” said Satyen Sangani, CEO, Alation.

“With the release of TrustCheck, we’re bringing policy, quality and usage context directly to the end user. TrustCheck lets every self-service analytics user instantly know whether the data or query logic selected is trustworthy and appropriate, irrespective of whether that data lives in Salesforce, Tableau, or is being accessed directly from a database.”

According to the May 2018 Gartner Market Guide for Information Stewardship Applications, “The recent complexity that is emerging — associated with such things as increased interest in data lakes, and now IoT analytics — is extending the need for operational policy enforcement in analytical use cases.”

In a world of tightly constrained users of analytics, top-down data governance was often successful, but the growth in data and users has outpaced this model’s ability to be effective.

Before self-service analytics, data governance teams focused on documentation and control, relying on a few select experts who spent time arduously creating rules and policies for data use.

Resolving compliance issues often meant policing user behaviour after a breach or critical mistake already occurred. Broad-based adoption of self-service analytics and an exponential growth in data creation has changed this environment dramatically. TrustCheck aims to meet the needs of this new world with the power of a data catalogue. With TrustCheck, data governance and information stewardship professionals can focus on influencing user behaviour rather than documenting rules and policies.

TrustCheck is an embedded set of features in Alation’s machine learning-powered data catalogue. Information stewards leverage the Alation Data Catalogue to indicate whether a data asset can be trusted or requires additional context, and deprecate data assets that contain inaccuracies or could lead to non-compliance.

This feedback to users is available immediately through Alation’s query writing tool, Alation Compose, and through API-driven integrations with Salesforce Einstein Analytics and Tableau Server.

TrustCheck automatically surfaces visual cues in Alation’s Compose interface, where users search and write SQL queries, and directly on dashboards within Salesforce Einstein and Tableau Server. Alation’s delivery of this feature through a well-documented API also provides the opportunity for additional analytic tools to easily integrate TrustCheck in the future.

Why KM Efforts Fail

By Zach Wahl

In my career as a KM Consultant, I've often worked with organisations who have previously experienced failed KM initiatives and want to avoid repeating past mistakes. I've worked with an array of organisations spanning industries, size, and geography, yet the tales of Knowledge Management woe I encounter tend to be quite similar.

Too many of these organisations and their people say the same things: They've tried KM before and it didn't work. They made large investments, only to have people revert to the "old way" of doing things. They got everyone excited about the prospects, only to disappoint with underdelivery. These issues tend to be consistent regardless of the scope of KM efforts as well, and on projects focused mainly on process and people changes, as well as those that have a more technical focus.

1. Lack of Leadership Support

One of the most common reasons KM efforts fail is that they don't possess the appropriate level of support from leadership. This doesn't just mean a lack of funding or prioritisation, though those are certainly dire issues. In order for KM efforts to succeed, they need active support from leadership, with executives modelling and reinforcing the behaviour changes that must occur for the KM effort to truly stick.

Leadership support is also critical to remove project blockers and resistors throughout the organisation. The most effective means of engaging leadership is to tie KM effort to business value and, wherever possible, hard return on investment. KM plans must be put in terms of benefits to the business in order to generate and maintain leadership support.

2. Lack of End User Engagement

Many KM efforts have fail because they don't engage the very people who are supposed to get value out of them. Too frequently, KM efforts are designed without sufficient engagement from end users and business stakeholders.

This commonly results from KM practitioners and project owners making too many assumptions about what the end users really want, what troubles they're having, and how they'd like to see things change. Even if the practitioners "guess" correctly, end users typically revolt against change when they haven't had a seat, ensuring their voices have been heard.

At EK, we focus on a workshop-heavy strategy and design approach to ensure appropriate user-centricity. If we can't say what's in it for the end users associated with each recommendation we're making, we know we have more work to do. From strategy, to design, to implementation, and long-term iteration, a key success factor for KM is to ensure users are engaged and empowered to guide the effort.

3. Missing Vision

Another primary reason for KM efforts failing is a lack of definition and consensus regarding where an organisation wants to go. For many organisations, the KM transformation journey will be a multi-year effort. These efforts fail when not everyone is aligned around their destination.

Without a clear vision, organisations end up with internal competing priorities and misset expectations as to what the end state looks like. It is notable that most organisations believe they possess a shared vision, but once we start asking individual sponsors and stakeholders what their definition of success is, the answers can be dramatically different.

At EK, we counteract this misalignment by putting a great deal of energy into defining, socialising, and periodically revisiting the target state. We'll use personas, journey maps, and user stories to make the target state for KM feel real, and allow stakeholders to truly visualise the impact. Coming back to the target state over time to check-in and ensure no major priorities have changed is also a key component to maintaining alignment.

4. Too Much Theory, Not Enough Business

At EK, we focus on practical KM that will solve real business needs. Too much work in the KM field is based in academic theory and involves an exceedingly painful amount of discussion about KM best practices and academics, instead of focusing on real business value to address actual end user pains. Too many KM projects fail simply because they're placing too much stock in KM theories and have not focused enough in what their users want, what the business needs, and what will drive stakeholders to embrace real-world KM.

5. Excessive Complexity

Yet another major reason for KM project failures is that they are designed in an overly complex manner. This is not only a reason why many KM efforts fail, it's also the reason many never move past the planning phase.

KM, as a field, has always suffered from struggles regarding complexity and clarity. When you consider the many definitions for KM itself, and the vast array of topics, processes, and technologies that can fit within the KM bucket, it isn't surprising that many organisations end up with a confused and overly intricate KM strategy. To counteract this, EK focuses on agile design for KM strategy, identifying pilots and other foundational efforts that can show real value, measured in weeks and months instead of years.

6. Insufficient Marketing and Communications

Another major reason for failed KM initiatives is the incorrect assumption that "if you build it, they will come." In short, "they" won't. Good KM efforts require a significant, early, and consistent investment in change management, communications, and marketing to ensure all potential parties (everyone you're asking to change and everyone you're hoping will get value out of KM) will understand not just what KM is, but why they should care.

In other words, KM communications need to be about the personal and direct value to the end users and stakeholders. These communications should be in clean and direct business terms, avoiding KM jargon wherever possible, and instead speak in terms of what the end users care about and what they'll get as a result of embracing the change. As an important note, good KM communications aren't just something that happens at the outset or endpoint of a project release. Instead, they should be consistent and ongoing in order to continue driving the change and engaging end users.

7. Missing "Celebratable Moments"

Too often, KM projects talk in terms of features and functions, instead of business outcomes. In addition, overly "big-bang," sprawling KM projects wait too long to demonstrate value to their end users by showing them something real that they can use. Projects that take too long to show value often struggle to get or maintain the necessary traction and buzz to keep going.

To that end, at EK, as we're developing KM Roadmaps for organisations, we often talk about the Celebratable Moments. These are seeded throughout an initiative to deliver periodic communications to stakeholders to ensure they see progress and have real elements to which they may react. Moreover, these moments become a key component of the aforementioned marketing and communications, as it allows the KM team to show progress and demonstrate the practicality of the project approach and KM in general.

8. Mistaken Faith in Technology

We are at an incredibly exciting time in KM technologies, where many of the promises from a decade ago are finally reality. Auto-tagging tools are much more accurate than they used to be, ontologies and the semantic web are creating functional webs of structured and unstructured content, and enterprise search tools are making it easier to intuitively find and discover what you care about.

However, KM initiatives frequently fail when technology is regarded as the KM solution. While technology plays an important role, at EK we talk about KM in terms of People, Process, Content, Culture, and Technology. We always list technology as the last factor as a reminder that technology alone doesn't make KM work.

9. Forgetting About the Content

As a corollary to the last point, KM initiatives also fail when organisations avoid what, for many, is their number one issue: old, incorrect, and outdated content. In fact, in many organisations, 4 out of 5 documents/pieces of content would fall into this category of disrepair. Ensuring the quality of your content is the most critical foundational element for KM success. At EK, we often prioritise an assessment of the current state of content and the development of an ongoing roadmap to prioritise the NERDy content for cleanup.

10. Lack of Sustainment

Even projects that experience initial buy-in and success still run the risk of failure if not properly sustained. A client recently asked me how long they'd need a head of KM and my answer, quite seriously, was forever.

Organisations and their priorities are constantly in flux. Technologies, customer drivers, brand strategies, and user demographics are all dynamic. An organisation must assume their KM strategy and approach will be as dynamic as the rest of their organisation.

To that end, organisations that don't make a long-term investment in the communications, iterative adjustments, updates to processes and technologies, and continued engagement efforts for their KM strategies will quickly see the interest and support for such initiatives wither.

11. Lack of Governance

Though governance is much more tactical than most of the items above, I've seen many KM efforts fail as a result of poor or non-existent governance that it must be included in this list.

Efforts that have not put a long-term plan in place for KM Strategy, System, and Content Governance may see initial successes, but will turn into failures over time. Indeed, early KM successes that don't have the benefit of effective and comprehensive governance will quickly turn into failures, as systems and content trend toward chaos.

Governance may not be the most exciting element of KM, but in order to achieve sustainable evolution of your KM programs, it is absolutely critical. At EK, we define KM Governance to include Vision, Roles and Responsibilities, Policies, Procedures, Communications, Education, and Analytics. Together, these elements will define a KM ecosystem that will yield continuous improvement instead of system entropy.

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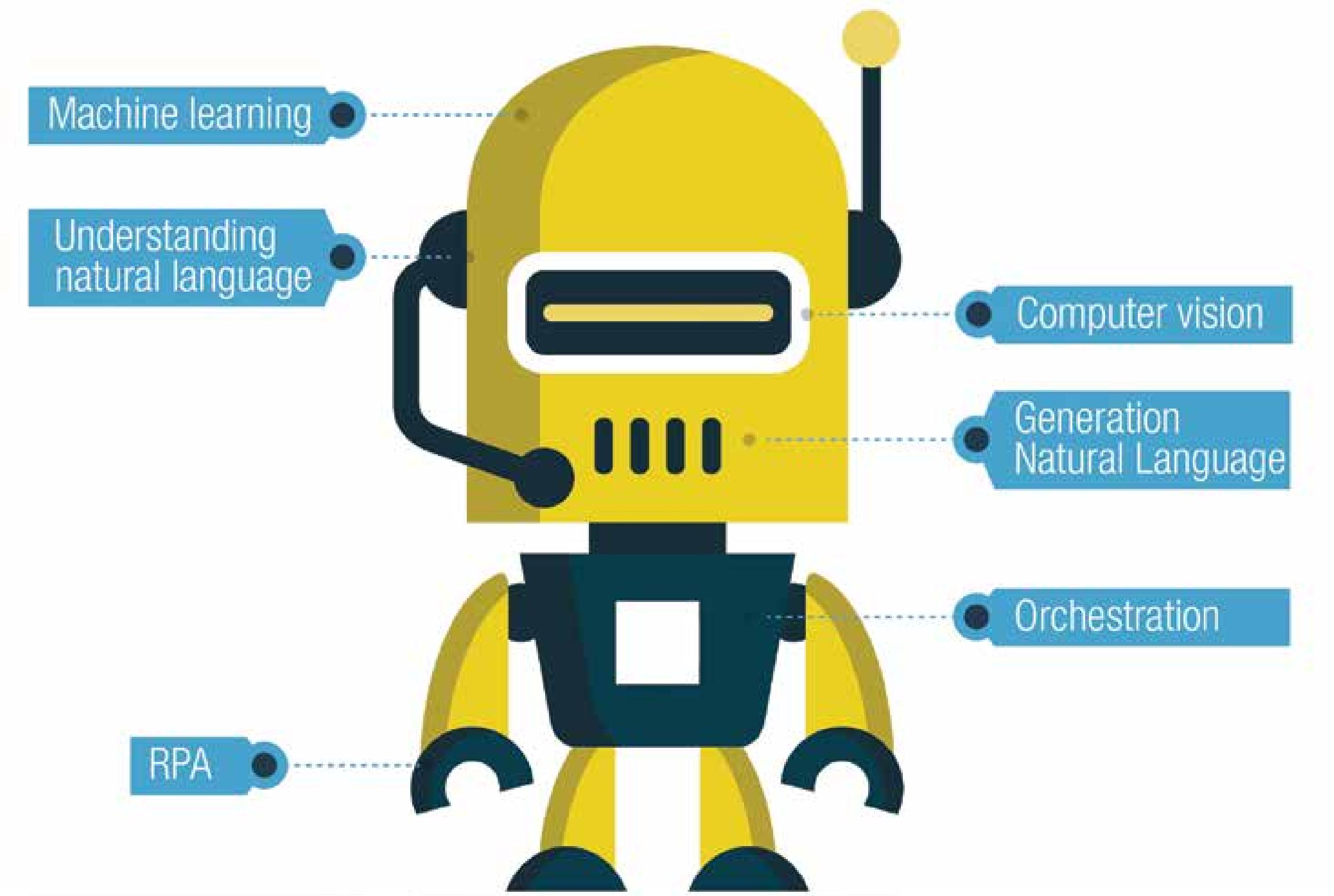
What is the state of play for RPA?



Some in the finance and banking industry are kicking goals with robotic process automation (RPA), AI and business process automation, but the industry still has few use cases in production, according to a recent report from Capgemini, "Growth in the Machine: How financial services can move intelligent automation from a cost play to a growth strategy."

The report is based on a survey of more than 1500 financial services executives globally, including the US, UK, India and Europe. The sectors it focused on were retail and commercial banks, capital markets – and life and non-life insurance. Of the organisations, 42% had global revenues greater than $US10 billion.

It concludes that "While organisations have driven significant efficiency gains through RPA … many struggle to make a success of intelligent automation, failing to achieve scale and drive value."

Of the organisations surveyed just 10% have implemented automation at scale, i.e., across all the geographies and processes that the company operates in.

While 17% were stuck at pilot stage, a large number (69%) have managed to get past pilot stage to deploy at one or two sites, but large scale adoption across business processes, functions, or geographies is still elusive

Looking across all stages of implementation – from concept to full-scale implementation – Capgemini found that 40% have adopted RPA, but only 4% have adopted machine learning.

It found India leads in deployment of intelligent-automation initiatives at scale.

This reflects significant investments and the availability of talent.

"It's not surprising that India leads in automation deployment," says a senior executive from an Indian lending, wealth management, and insurance firm.

"The automation technology capabilities can be built within a short span of time, but domain expertise is the differentiator for success. Talent is definitely not an issue for automation in Indian financial services."

Malaysia-based CIMB Bank started RPA implementation in September 2017 for automation of a host of banking operations, including financial reconciliation, maintenance, e-banking, audit confirmation, and auto checking/reminder follow-ups.

To date, it has already automated 47 processes, with a marked improvement in the processing times.

Additionally, the bank has managed to achieve an impressive 90% reduction in turnaround time for nine out of 15 banking processes that were automated using robotic process automation (RPA) in November 2017.

Around half of organisations surveyed face issues in integrating their automation platforms with legacy software systems and tools. For an automation program to run successfully, it needs to have access to all the source data from multiple systems.

This is particularly true for those processes, such as payments, that rely on access to data from multiple systems. Getting and maintaining that access is complicated by many factors: technology integration, change control, and other risk and control issues.

"We have had a lot of technical challenges with different platforms and discovered that some platforms are not very robot friendly," says Jenny Dahlström, head of Robotic Implementation for Handelsbanken Capital Markets, a boutique investment

The Real Benefit of an Easy to Use RPA Tool

By Vargha Moayed, Chief Strategy Officer, UiPath

RPA was initially invented to respond to the frustration of business people in large organisations with what they perceived, rightly or wrongly, as the inertia of their IT colleagues toward pressing business driven demands.

To implement RPA, one needs to intimately understand a process at its lowest level (i.e., working instructions) and all its exceptions, the actual word used for it being “user story”.

In order to build an effective RPA script, it is important to have skills that allow one to understand, decrypt a business process and ultimately know how to harmonise and optimise it. Often, these skills reside with the process re-engineering talent such as, for instance, Lean/Six Sigma practitioners.

Consequently, companies that are trying to automate processes have two choices. The first approach consists of having business analysts that understand processes to build user stories and hand them over to RPA developers.

The second approach relies on business analysts or Lean practitioners becoming RPA developers themselves, thus merging the two roles into one.

Currently, in the early days of RPA deployments, many companies prefer the first approach, whereby they have business analysts and RPA developers working side by side.

This scenario is preferable to them because many RPA tools, despite their simplicity promise, are not so simple to use, hence need to still involve people from an IT background on the development side.

What’s more, some companies believe that moving development teams offshore can lower the cost of automation.

By choosing this approach, companies tend to repeat the same mistake that has plagued IT development since the beginning, namely the difficulty in communicating and exchanging specifications between functional experts and developers compounded by off-shoring.

This has been already solved many times in the traditional IT manner, through the “waterfall” method. But it can be frustrating, error-prone and often not the best approach for RPA development that relies a lot on an Agile approach that calls for frequent interactions between process owners or end users and developers.

Conversely, the approach that consists of turning process experts into RPA developers allows for a higher quality script, faster and better understanding of exceptions, an opportunity for process optimisation and, as a result, more rapid deployment.

Obviously, this can only be achieved if the RPA tools development environment is intuitive enough for non-IT people to be able to use it such, as the one offered by UiPath .

The simplicity of development is crucial when choosing an RPA platform. Naturally, process specialists turned developers will need the help and supervision of a solution architect with a broader IT knowledge.

This approach delivers excellent results, and process specialists are excited to start developing, whereas conversely hardcore developers don’t find RPA development “sexy” enough and might be bored quickly, leading to high turnover.

Furthermore, for companies that still want to go with the first approach of separating business analysis from RPA development, simplicity allows them to tap into a pool of less experienced and less costly developers.

Still, a higher turnover is likely to occur as the most talented programmers will migrate towards more complex development environments once they become better skilled.

And last but not least, a simpler, more easy to use RPA tool allows, of course, for faster development and, as a consequence, faster results.

Vargha Moayed is Chief Strategy Officer UiPath

banking firm.

“We faced problems with traceability, access rights, and firewalls.”

Inability to establish a business case

Capgemini found that 43% of organisations say they do not have a process for identifying the business case for automation. This reflects the lack of focus on high-impact use cases. When teams execute complex use cases with long payback periods, senior leaders’ backing for future pilots is challenged. In fact, 41% say they are struggling to get leadership commitment for advanced automation.

Gaining consensus across the business – on issues such as the processes to be optimised or clarity on roles – has been particularly challenging for nearly half of organisations.

Units are often reluctant to relinquish autonomy in areas they consider to be critical to their existence.

“Split ownership of processes is a concern, especially when front-end or online processes are not integrated with other processes,” says Nils Henrikson, program director Digitization and Claims Automation for Trygg-Hansa, a Scandinavian insurance company.

“It is important to have end-to-end ownership of a process. It means firms can drive automation initiatives with full control and better coordination.”

Algorithms require the right data at sufficient volumes

Although industry players have made significant investments in data governance programs focused on quality and availability, Capgemini found that 46% said that the lack of an adequate data management strategy hampers progress

“We have huge amounts of data in our business, and we are not really using it to a full extent,” said Trygg-Hansa’s Nils Henrikson. “I think we can do a lot more with better use of data with machine learning.”

Around half of respondents said cybersecurity and data privacy are major factors preventing action. Privacy concern stems from the potential misuse of data containing customers’ personally identifiable information (PII), such as names and addresses.

Capgemini estimates that Intelligent automation could add $US512 billion to the global revenues of financial services firms by 2020, with $US243 billion gained in insurance and $US269 billion in banking and capital markets.

The full report is available at https://www.capgemini.com/wp-content/uploads/2018/07/Report1.pdf

Finding the enemy within: improving your internal audit with forensic data analytics

By Deepak Pillai and Jack Dong, Clayton Utz

While internal audit can always review an organisation's process and procedures, it cannot always detect the minor frauds – which is where forensic data analytics can play a vital role.

One of the misconceptions around corporate fraud is that it's perpetrated from the outside – that offshore cyber criminals, master hackers and internet gangs are using advanced technologies to wreak havoc on corporations and institutions from afar.

Insurance behemoth Allianz asked 1900 business respondents in 88 countries this year what were their most feared "risk events". The bulk of respondents believed their companies were most at risk to cyber fraud, ransomware and/or outside intrusion of proprietary data.

The truth is, fraud is the enemy within. Asset misappropriation, the common art of stealing, reigns supreme as the most likely malfeasance perpetrated on a company. Who is more likely to have access to client details and personal information about customers and employees – people on the inside or people on the outside?

It is the misappropriation of cash, the raising of fake invoices and payments made to non-existing suppliers or employees which still bedevil most companies and government bodies.

These age-old abuses are mainly placed under the protection and surveillance of the internal audit team, which covers the weaker links of an organisation – its outgoings, that is, payrolls, accounts payable, capital expenditure and the deployment of working capital.

While internal audit can always review an organisation's process and procedures, it cannot always detect the minor frauds, the everyday sleights-of-hand which are the most common features of internal fraud.

Finding them has increasingly become the province of forensic data analytics. Data analytics can locate the payments made on a Sunday afternoon, match supplier addresses to employee addresses and seek out false bank accounts, ghost vendors and duplicated bank details.

It can check if payee details have been changed after the approval process and before a payment file has been uploaded. The systems can diagnose data related to value, volume or date/time or to system user ID type issues, all of which can greatly assist compliance, risk and internal audit teams.

In data analytics, two processes are being applied. The first is historic – the search engine and data mining capabilities are founded on a risk library accumulated over years of experience – it knows the most common ways employees and/or managers can circumvent controls, how people in individual business units and departments might plausibly commit fraud. It knows how those in capital expenditure or accounts payable might deceive for personal gain in a way that might differ from those in procurement or expenses.

The second is understanding the company's own exposures. This revolves around extracting a company's proprietary data from the system and testing its fallibility. The analytics can identify the company's weak points and can create tailored rules to cover the areas or processes most at risk.

Data analysis asks the tough questions of all the major expense units in a company. These include:

• **Procurement:** Have there been invoices split to circumvent the delegation limits or are there vendors in the master file that were once employees? What payment controls are in place? Do vendors have the same bank accounts as any of the employees?

• Payroll: Were payments made to terminated or fake employees; which personnel could make unauthorised changes?

• **Travel, expenses, overtime and holiday pay:** Did an employee claim the same expense multiple times; did he or she create extra overtime; was holiday bonus paid, the holidays taken cashed out and then fictitiously reinstated?

• **Capital expenditure**: Which project managers and providers tend to request variations? Were purchase orders created retrospectively after receipt of invoices? Could operating expense items be posted as capital expense (or vice versa) to take advantage of an existing budget?

• **General ledger**: Were there journal entries that may relate to bribery or corruption? Were there unusual journal pairings that indicate profit manipulation?

Only a few years ago the idea that systems could monitor insider trading and corruption by analysing employee linguistic patterns would have been scoffed at. Now systems can "read" the fraud vernacular across social media and emails, chat rooms and text messages – what experts call "unstructured data".

Analytics can now monitor digital communication between employees, assess cyber exposure, perform text mining to identify patterns and unauthorised behaviours as well as the means to check an employee's entitlements against actual amounts paid.

The end game is very much about process improvement. Analytics pinpoints where processes aren't being followed even though internal audit may point to due diligence being followed. The data does not lie. It can show whether processes are being adhered to, bypassed or being "mis-delegated" to unauthorised personnel.

Forensic analytics is not just about fraud. It is equally about waste and error. For example, a system could run checks for duplicate invoices – it is not uncommon for a vendor to have mistakenly sent two invoices by accident, and the payables department to have paid out the amount twice. The duplicates may have been intentional, but just as often they are not.

The company monitoring its own data flows will see it as a dashboard which looks at all of the above and allows an organisation to have a very clear oversight of fissures and cracks in its internal operations.

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How to Build a Blueprint for Your Corporate Memory

By Tej Redkar

Fun fact: the average business today uses over 300 applications to run the enterprise. Employees shift between these apps every two to three minutes, and according to McKinsey, spend almost 50 percent of their time searching for information and managing communications.

This is today's digital workplace, and it is a beautiful and terrible thing. Technology gives us more options for communication and collaboration than ever before. But it comes at a cost unless companies prepare a clear technology blueprint that documents and visualises their entire digital workplace. What price do organisations without a strategy pay? The decline of corporate memory. With so many people creating so much content in so many places, data gets stored in silos, never to be seen again. From local laptops to email, document repositories to old-school intranets, chat, text, Skype, Slack … the list goes on, and the knowledge gets lost forever.

The loss of corporate memory is more serious than it perhaps sounds. Corporations are living organisms, and similar to their natural counterparts, their culture is based on collective memory. Without the assets and interactions that drive an organisation on a day-to-day basis, culture would become almost impossible to pin down and communicate. Lack of a strong culture brings its own ramifications, from reduced productivity to low employee engagement to high turnover.

Fun fact number two: the loss of accumulated corporate knowledge costs companies an estimated $US430,000 per departing employee on top of the "usual recruitment replacement costs." Corporate memory may sound like a fuzzy topic, but the numbers are anything but. It feels like a catch-22: We need all these technologies to do our jobs, but they impede us from doing our jobs productively. How can we rein in the application sprawl of the digital workplace while ensuring we still have the tools that we need? I believe it starts by looking at the technology that makes up your digital workplace through the lens of your corporate memory. Instead of thinking about technology strategy as providing an app for every use case, think about how to connect all those apps so you can transform transient memory into persistent memory and help employees make better decisions, faster. Here's what this approach looks like in action:

1. Categorise Your Organisation's Content

Not all content is created equal, nor does it all need to be stored and searchable. The first step to standardising your corporate memory and optimising your digital workplace is to organise company knowledge. Corporate content comes in three flavours:

Tacit knowledge: The approximately 40 percent of your corporate memory that lives in employees' brains. Without a structure in place, that's where it stays, and vanishes when an employee leaves.

Transient knowledge: The 10 percent of corporate information that goes back and forth. These are the messages, conversations and content that live in chat apps, in texts on employees' phones, or in comments on collaborative docs. Trust me, some of the most impactful corporate decisions are made here, and never recorded.

Persistent knowledge: This accounts for the remaining half of your corporate memory, including all "official" corporate information that's created with the intent of documenting and sharing knowledge. Employee and customer engagement systems (like corporate intranets, HR and CRM apps) fall into this category, as well as all the documents, spreadsheets, presentations and emails your employees constantly create. Persistent knowledge presents the biggest opportunity when it comes to organising and collating information across all your tools because much of it still remains in employees' inboxes and document storage accounts.

Once your corporate knowledge is categorised, you can determine what is most critical to keep and what you can let fade away. The ongoing categorisation effort, however, should not be manual. Given the volume of data created in a digital enterprise, it's crucial to categorise content automatically without expecting employees to tag or organise it. That means you need an analytics system that understands the content in realtime, extracts the appropriate context through people-topic modelling, and builds out organisational knowledge graphs with querying capabilities.

2. Create a Data Pipeline

To get there, you need to connect different sources of information and communication together by creating an end-to-end data pipeline. It should include the following functionality to scale out your analytics data streams:

- An information extraction system that pulls structured and unstructured information from different content sources across your organisation, like documents, text, images, videos, etc.
- A content analytics system that runs statistical and machine learning algorithms to correlate people and content relationships.
- A content enrichment stream that adds metadata to your content on-the-fly from complimentary data sources like HR management systems, knowledge graphs and domain graphs.
- A content lifecycle system that constantly reorganises and prioritises the content based on your organisational needs.

3. Build an Organizational Knowledge Graph

Once your data sources are connected and your content enriched, store it all in a centralised location. This is your hub for people and knowledge, the corporate "brain" at the centre of all your endpoints. This is not a standard, linear document repository but an interconnected web that includes people, content and, most critically, the interactions between them. It houses knowledge, makes it easily and quickly discoverable, and eventually serves it up proactively based on preferences and realtime context. This core data structure should maintain all people-to-people, content-to-content and people-to-content relationships across your organisation.

4. Add Context

Once your people and content are connected, you need to add context to ensure that discovering them is fast and effective. This starts with semantic search. Your hub's search capabilities should be predicated on your organizational domain, content and people with automatic contextualisation. A semantic search understands the intent of your search instead of just mapping a keyword to indexed content. For example, a search for "Tesla" should return very different results when you are shopping for a car versus in a library searching for patents. These types of distinctions are a key requirement for having a strong, standardised corporate memory.

5. Go Next-Gen

To create a truly successful digital workplace, the intelligence at the centre of your corporate memory should evolve from descriptive to predictive and eventually prescriptive. That means that employees can not only search and find knowledge, but have it recommended to them, in context, when and where they need it. The real value of search is when you don't have to search: the system's AI will know what you need, when you need it, and deliver it accordingly. A digital workplace is far more than a collection of apps that allows us to work remotely. It can be either a destroyer or enabler of your corporate culture and memory. As such, your blueprint to a successful digital workplace should focus not on which tools you need to solve individual use cases, but on how to connect all of those use cases and the people behind them in a meaningful — and powerful — way.

Tej Redkar has been building enterprise software products for more than 20 years, and recently joined Aurea Software as chief product officer.

What to Make of DocuSign's Acquisition of SpringCM

By Marko Sillanpää

On July 31, DocuSign announced that it was acquiring SpringCM for $US220 million. I think a general "huh?" could be heard across the industry. What exactly does this mean? For the last few years I've been looking at the two markets, of ECM and CLM, and the confusion that exists between them .

DocuSign has been the default electronic signature company as electronic signature technology emerged. DocuSign has pretty much partnered or integrated its technology with every major software vendor especially those in Enterprise Content Management (ECM), a.k.a. Content Services Platforms, and Contract Lifecycle Management (CLM).

DocuSign has had very few competitors. Adobe Is the only other leader and HelloSign has been making some hard moves into the OEM space. This can be seen in DocuSign's market capitalization of over $8.7 billion .

SpringCM, on the other hand, has been trying very hard. SpringCM was founded two years after DocuSign in 2003. SpringCM raised over $US150m in venture funding.

SpringCM has been standing on the edge of cloud ECM and CLM for some time. (At one point, SpringCM was a Marketing Asset Management company.) But over the last few years it's been in both ECM and CLM. Most ECM vendors did not see SpringCM as a major competitor, nor do most CLM vendors.

What is DocuSign doing?

When looking at the market and the shift to Content Services Platforms (CSP), it's inevitable that DocuSign would look to expand its position in this market to provoke some new growth.

The company had two choices. It could continue to provide technology to vendors to allow them to build solutions (what they have been doing) or become a solution provider of their own. They decided it was time to become a solution provider. Here are some of my concerns.

DocuSign will now be competing in the CLM market. There are over 20 vendors in the CLM space. SpringCM was never a major player in this space.

The biggest CLM vendor is SAP Ariba and other major vendors include Coupa with a market cap of $US3.5 billion and Apttus and Conga who have both received funding from Salesforce Ventures. Because of Salesforce Ventures investment in Apttus and Conga these two vendors have a strong relationship with Salesforce.

The Contract Lifecycle Management space is also a bit confusing with all the different "buzzwords". In addition to CLM, this space is also called "Procure to Pay," "Quote to Cash," and even Enterprise Contract Management. Now DocuSign wants to call this a "System of Agreement". Some of these vendors are partners of DocuSign.

ECM is a Changing Market

For those that haven't been watching ECM closely, it is a space of transition. There has been a major shift in most of the market.

Long time player , Documentum was acquired by its competitor OpenText and Alfresco was acquired by equity capital. These changes have much of the market in flux. The space now is being called Content Services Platforms (CSP). The idea is that ECM solutions are used to build other end solutions. But again, SpringCM was not a major player in ECM, or CSP. DocuSign has been a partner of every ECM vendor.

I think that with DocuSign suddenly becoming a competitor in the ECM and CLM space, it's inevitable that other ECM and CLM vendors may look to a new partner for electronic signatures that is not a competitor. This will probably be more significant in the CLM space as this is where they will be directly competing. Most CLM vendors have partnered with DocuSign.

The DocuSign sales team will also need to lean heavily on the SpringCM sales team. To date, DocuSign has been a supporting player. It worked with workflows of any type to provide review and signature capabilities, but now it will need to sell to end users based on a specific business process.

They will now need to talk to the contract drafting process based on using preapproved clauses and how they can speed up the negotiation of contracts. They will also need to be able to talk to contract expiration versus evergreen contracts and monitoring performance to contract obligations, topics that may be very foreign.

Still I think that DocuSign is in a great position when it comes to CLM. With the financial resources that DocuSign can bring to the space, it is easily the number two after SAP Ariba. With Ariba's focus on SAP, this easily places DocuSign as the largest vendor on top of Salesforce. Overall there a lot of potential positives here but it's a bumpy road ahead.

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 @MSillanpaaBMOC .

ANZ doubles down on Knosys

ANZ has signed a three-year contract extension for the continued use of Knosys' knowledge management platform. ANZ also has the option to extend the contract further via two one-year extensions. The potential value of the contract over the entire five-year life is expected to exceed $A6.5M.

In addition to extending the Knosys contract, ANZ will upgrade its system to the latest release of KnowledgeIQ moving forward to benefit from its new features.

John Thompson, Chief Executive Officer of Knosys, said: "This contract once again reflects the confidence that ANZ has in our company's capacity to deliver a superior knowledge management platform.

"We are starting to see a trend in many industries where companies are transforming to become more agile and customer focused. They aim to create a more knowledge-based workforce capable of promptly dealing with change. Solutions such as ours support these initiatives by enabling staff to find relevant information more quickly, deploying new processes faster and to assist in multiskilling. This simplifies the sharing of information across business units and teams and eliminates silos."

www.knosys.it

Newgen Software moves in downunder

Adding to its subsidiaries in the United States, Canada, United Kingdom & Singapore, India's Newgen Software Technologies Limited has now opened an Australian office as part of a concerted push into the A/NZ market. IDM asked Chairman and Managing Director, Diwakar Nigam, who co-founded the firm in 1992, to outline local plans for the firm's suite of Enterprise Content Management (ECM), Business Process Management (BPM) and Customer Communication Management (CCM) solutions.

IDM: Why has Newgen decided the time is right to enter the Australian market in 2018?

DN: We already have an existing partner network throughout ANZ, however, we see a lot of opportunity within organizations of all sizes across the region. Hence, we recently opened a new corporate office in Sydney. The A/NZ market is driving quickly towards digital transformation, particularly in industry verticals where we have domain expertise, such as Financial Institutions, Insurance, Government and Shared Services. We are ready to aid organizations in ANZ in their quest to reinvent the workplace. Newgen started its journey in 1992. Since then, it has been the heart of digital transformation providing world-leading technologies to help organizations achieve digital transformation goals.

IDM: There are many established local and international players in the Australian and NZ markets, what is the opportunity for Newgen? What is the unique value proposition?

DN: With our passionate customer focus, we have not had a single failed implementation since the time of our inception. This showcases our focus and commitment towards our clients. We have an active customer base of 500+ clients; including Fortune 500 companies. We have been a preferred partner of some of the World's leading Banks, Insurance Companies, Healthcare Organisations, Governments, Telecom Companies, Shared Service Centres, and BPOs amongst others.

We are also focused on driving innovation through R&D. Our Configurable Unified Platform allows customers to build their own differentiated applications and processes. It enables a faster go to market with a ready-to-go solution built-in. Unlike an off-the-shelf point solution, this platform allows customers the flexibility and configurability, giving them a competitive advantage over others. We offer new era technologies - RPA, Mobility, Cloud, etc. - which help enterprises to reinvent their workplace. These technologies not only allow our clients to work faster but also help them make their customers happier.

Our products are recognized by leading analyst firms including Gartner and Forrester. We have been positioned as a 'Leader' in Dynamic Case Management in Q1 2018, Digital Process Automation in Q3 2017, and Enterprise Content Management in Q2 2017 by Forrester in its Wave Reports.

IDM: It's been over a year since a research analyst firm, Gartner declared that Enterprise Content Management (ECM) was dead and would be superseded by Content Services. And yet in 2018 analysts are reporting that a rising need for securing confidential data is triggering the adoption of enterprise content management software. So where does the truth lie?

Diwakar Nigam, Chairman and Managing Director, co-founded Newgen Software Technologies Limited in 1992. The company has a footprint in over 60 countries with large, mission-critical solutions deployed at Banks, Governments, BPOs & IT Companies, Insurance firms and Healthcare Organizations. Newgen went public and launched its Initial Public Offering (IPO) on January 29th, 2018 in Mumbai. It is listed in the Indian Stock Exchanges, namely National Stock Exchange (NSE) and BSE Ltd. Newgen's INR 425 crores ($A83M) IPO received a tremendous response and was oversubscribed.

DN: Considering the pace at which businesses are going digital, the amount of content produced is growing at an exponential rate. As the world gets increasingly connected, the traditional channels for content production have been supplanted by digital channels which adds to the challenge of content management. Since content is at the very centre of digital transformation, ECM has an integral role to play in this revolution as well. It will enable effective life-cycle management of critical business content, from its capture to disposition. It is here to stay because Content Services are the fundamental building blocks of the next generation ECM platform.

Powered by content services, the platform utilizes a micro-services architecture to create rich customised applications. This allows businesses to move away from the monolithic, centralized approach and leverage flexibility and extensive integration capabilities, enabling seamless integration with third-party applications and tools. Further, it also helps to mitigate business risks by ensuring compliance with various regulatory requirements and securing business-critical information.

IDM: This sounds very much like a recent document from Australia's Department of Finance regarding a Whole of Government records Management Proposal. Is that something you are looking to be considered for?

DN: Certainly, we have domain expertise in the Government vertical and have solutions like E-Gov, Electronic Document and Records Management System (EDRMS), etc. for the Australian market. Our products are Victorian Electronic Records Strategy (VERS) certified.

These help in reducing process delays, accessing and utilizing information quickly to expedite work. We are also seeing upcoming opportunities in niche segments such as energy and utilities in ANZ. Our solutions enable clients with higher efficiencies, shorter turnaround times and reduced operational costs into project-centric processes. Besides, our CCM Suite helps the clients reinvent their customer experience through personalized, content-rich communications; be it pro-active or on-demand.

IDM: What are the key focus areas for R&D?

DN: We, at Newgen, are focused on driving innovation through R&D to expand our solution portfolio. We have a skilled R&D team with deep product domain expertise. Our dedicated in-house R&D team comprises of more than 250 employees with a vision to fuel our technology innovation. Our focus continues to be on innovation and on launching new products/ features creating a highly connected and digital workplace. We intend to continue to enhance our R&D capabilities to create solutions for emerging technologies. As of March 18, we have 37 patents applied; out of which 5 patents are registered in India, 28 patent applications are outstanding in India and 4 patent applications are outstanding in the USA.

We've gone Digital - but can't find a record of it!

By Demos Gougoulas

Today, many government and enterprise organisations are focused on implementing Process Automation initiatives. However, in many cases, the desire to be more efficient fails to consider the importance of capturing what comes out at the end of a process as a record.

There is more and more attention being paid to digital transformation, but often the simple task of correctly naming and registering information and putting it in the right place is a bridge too far. Traditionally records capture has been carried out at the end of the information life cycle as a product of compliance (Because we have to!)

Many organisations capture data as it is created or as it enters the business in order to distribute, process and utilise information (Because we want to!)

However, the current trend in digital transformation is seeing the focus placed on automating manual business processes and capturing the record as a consequence. (Records capture as a function of the business process)

This 'business process digitisation' is something we have been doing at EzeScan since 2002. Digital is what we do!

Many of our customers are telling us that they are scanning less paper but processing more and more 'born digital' records. Ultimately their issues are the same, handling large volumes of information and having to perform manual data entry, all on tighter budgets. In the attempt to simplify electronic records management many organisations are trying to push some of the capture back to the business units, rather than centralised record-keeping.

Business units are better placed to fully understand the nature and value of the information they create and collect. Ultimately, they are in best position to describe what each piece of information is and the value to the business or agency.

Artificial Intelligence (AI) and Natural Language Processing (NLP) are both being applied in terrific ways to analyse and categorise large pools of historical records. However natural human intelligence is the best method for understanding the significance of a transaction as it occurs.

While many organisations want to capture digital assets in place, they are rightly concerned about how they can comply with digitisation and records standards.

Unfortunately for the organisation many individuals see the function of registering records as "not my job!". Whether it is paper or electronic, the work involved in capturing records – document preparation, paper and file handling, registration, profiling, etc. - is just not that much fun.

The familiar result is people name their documents with silly names and dump them in the wrong place.

Records capture should be invisible, seamless and should just happen! At EzeScan our focus is helping record managers make the practice of record-keeping a function of the business process as opposed to an obligation at the end of the information life cycle.

This can begin with an appropriately designed and configured EzeScan batch capture solution, which provides governance and compliance functions in addition to being a fast and cost-effective method to digitise, capture and register documents of all types.

Seamless integration with many popular EDRMS platforms has made it product of choice for many records and information managers.

With EzeScan, our customers are able to batch processing both physical and electronic documents including email. Over time the reliance of physical documents is being phased out as paper-based workflows are migrated to digital workflows.

At the core of every EzeScan batch capture implementation is alignment of the business process with the recording of defined information associated with that process as a record.

The added value is EzeScan's ability to:

• initiate intelligent automated processes

• accelerate document delivery

• minimise manual document handling

• capture critical information on-the-fly

• ensure regulatory and digitisation standards compliance.

In production environments, EzeScan can be used as the principal records tool for the capture and recording of the digital assets. For decentralised capture, EzeScan's suite of WebApps provide records-aligned business process tools for all staff within an agency and the members of the public they interact with. The WebApps ensure the digital assets are captured with the required metadata, named and filed correctly, distributed to the required personnel, initiate the correct record action or workflow, all with little effort and no records management expertise. WebApp solutions include automated records workgroup capture from MFDs, digital mailroom distribution, mobile digital file capture, file approval and intelligent barcode creation.

One of the latest EzeScan WebApps is the "DIGITAL FORMS ASSISTANT (DFA)". The EzeScan Digital Forms Assistant (DFA) is the ideal tool for any agency to effortlessly transfer labour-intensive paper-based business processes to efficient digital online ones. The Web-based admin interface makes it easy to create and manage web forms (such as applications, surveys, multi-choice exams and customer feedback forms to name but a few) by simply adding the required forms objects to the Web page (e.g. radio buttons, tick boxes, list boxes, lookups, grids or images). Web forms can be accessed either internally on a company intranet or externally via the internet.

Captured information can be validated in realtime with static metadata applied automatically. For every digital form submitted, the EzeScan WebApp Server can generate an XML file containing the captured data and optionally render the web form as digital asset (PDF) and automatically name and file this correctly into your EDRMS. For supported EDRMS systems, EzeScan can also satisfy compliance and governance requirements or automatically trigger workflows delivering even greater business process automation.

Demos Gougoulas is Sales & Channel Manager with Outback Imaging, creator of EzeScan. Email him at demos@ezescan.com.au

Kapish announces new Intelligencebank Connector

Kapish (a Citadel Group Company) has announced a strategic partnership with IntelligenceBank to integrate selected business process management applications. A new Kapish 'Intelligence-Bank Connector' for Content Manager will seamlessly integrate IntelligenceBank's Digital Asset Management (DAM), Marketing Operations, Board Portal and Governance and Risk Compliance (GRC) software with TRIM and Micro Focus Content Manager products.

While many organisations and Government departments use TRIM and Content Manager as their system of record for enterprise records management, there is a clear need to use bespoke business process management applications to manage more niche applications such as Digital Asset Management and Marketing Operations, Online Board Portals, and Risk and Compliance Registers. Kapish's new 'IntelligenceBank Connector' for Content Manager gives customers the best of both worlds.

Citadel CEO Darren Stanley said "At The Citadel Group, we specialise in enterprise information management in complex environments. Through Kapish, we deliver an extensive range of software solutions that enhance productivity, workflow automation and system integration.

"Our partnership with IntelligenceBank provides a fantastic opportunity to extend the capability of our Content Manager solutions to drive business efficiencies whilst maintaining corporate records compliance".

The Kapish IntelligenceBank Connector for Content Manager enables users to realise a range of efficiencies, including:

• IntelligenceBank DAM and Marketing Operations – enables marketing teams to centralise creative assets, transcode files on the fly, seamlessly integrate with Adobe CC and several web content management systems and manage marketing workflow approvals and marketing projects. When 'work in progress' files need to be archived, they can automatically be sent to TRIM and Content Manager.

• IntelligenceBank Boards – enables corporate Boards, Cabinets and Government committees to create online agendas, approve resolutions out of meeting and schedule meeting dates. When a meeting is finalised, the Kapish IntelligenceBank Connector will enable board meeting packs to be sent to TRIM and Content Manager as the final system of record.

• IntelligenceBank GRC – enables Risk and Compliance Managers to manage policies, risk registers, conflicts of interest and corporate controls. At the end of each audit, risk and compliance data can automatically be stored within TRIM and Content Manager via the Kapish IntelligenceBank Connector.

Tessa Court, CEO of IntelligenceBank, added that "We are delighted to partner with Kapish to deliver operational efficiencies to their clients. Kapish share our mission to make business processes seamless and we look forward to working closely with them to achieve great things in the future".

Kapish is a member of The Citadel Group (ASX: CGL). Citadel specialises in managing information in complex environments through integrating know-how, systems and people to provide information on an anywhere-anytime basis.

Citadel's 2018 financial results revealed a 39% increase in net profit.

Citadel CEO Darren Stanley said: "It has been another strong year as we delivered to plan, generating a record number of contract wins and extensions totalling $74 million across our core verticals of national security, defence, e-health, government and tertiary education."

Your Employer May Be Watching Your Every Move

Employers are increasingly gathering data on employees – from workplace behaviour to social media use and other personal information -- to produce insights that benefit the business. This raises a significant question. Is your employer watching your every move? A new HR Metrics & Analytics Summit survey of 250+ global HR leaders and employees found that 80% of organizations are using employee records and data to measure performance. A fair number of organizations are also using employee records and data to measure retention, reduce turnover, enhance engagement and recruitment. Interestingly, less than 40% of organizations are making use of employee data to enhance company culture.

The data shows that employees find it the most acceptable to be monitored through workplace-related tasks, work email, and work phones. The most unacceptable monitoring platforms are private social media accounts, physical movements within the workplace, and personal interactions.

Overall, employees do not mind data collection related to concrete business goals but are generally opposed to being monitored through personal sources.

Seventy-two percent of respondents find it unacceptable for employers to monitor private social media accounts. More than half additionally indicated that tracking physical movements and personal interactions in the workplace is objectionable.

More than 85% of HR leaders have set privacy and security guidelines regarding what employee information is collected, how it is stored, and if it is used appropriately, but approximately 15% do not have guidelines.

Among the employees responding to the survey, 95% indicated that they are most concerned with knowing that their data is secure against hacking and theft, and desiring that their employer be transparent on what data is being collected.

More than half would object if their employer asked them to use "wearable" technology to track their physical movements in the workplace. Less than a third are open to wearing such technology for tracking purposes.

When employees were asked if they trust their company to protect their data, almost half (48%) indicated that they do not. Among the reasons for this are mistrust in protecting data, insecure software in the workplace, incompetent IT departments, previously misplaced data (by the employer), and zero transparency regarding how their data is protected.

Employees are most open to data collection by their employer for the following benefits: A better-designed workplace, retention/promotions, and more favourable employee incentives. However, they have grave concerns about the protection of their privacy and are generally opposed to being monitored through personal sources.

While data collection and analysis is a top priority among HR leaders, relatively few are using analytics well. As a must-have capability in today's business climate, organizations must work to improve how they analyse their data and protect their employees' privacy.

To download the full report, visit https://hrmetricsanalytics.iqpc.com/downloads/workplace-privacy-and-protection-is-your-employer-watching-your-every-move

Digital Transformation, Disrupted

by David Yockelson

"Digital transformation" is a collective term that suggests action being taken by an organization. While there are different definitions of the term, generally speaking, it entails an organization taking on a strategy, applying tactics, and changing from some versions of "analogue-ness" to being digital. This can be in terms of business model, operations, technical underpinnings, etc.

"Digital disruption", however, often connotes an action (and typically a bad one) happening to a market or an organization. People tend to think of being disrupted rather than disrupting, or at least those stories tend to receive the most press.

That said, Gartner clients – and this should not be much of a surprise given that Gartner is a technology research and advisory firm and its clients have historically tended to be buyers or sellers of technology – closely link technology with disruption (blockchain, AI/ML, and IoT often come to mind first). That's not totally correct, either. But we can agree that there is typically a notion of innovation or transformation – voluntarily or involuntarily – in one form or another that accompanies digital disruption.

It turns out that these concepts are – and must be – intertwined. We need to think of the relationship between transformation and digital disruption similarly to the way we think about evolution. Along the way as species evolve, there are changes induced either through natural selection (giraffes have long necks) or through cataclysm (giant meteor wipes out dinosaurs), but one way or another, in order for a species to evolve, grow, and scale, disruption is part of the plan.

The transformation of a species is directly tied to the manner and pace with which it disrupts or is itself disrupted (and whether it's prepared to weather a negatively disruptive event). Moreover, it doesn't have to consider whether or not to disrupt – it just either does it or is itself disrupted. Guess what? Digital disruption within the enterprise acts and works the same way.

This means two things: Disruption isn't really a new thing. Organizations have been disrupting or feeling the effects of disruption forever. From train travel across the country to UPC codes shaking up retail to open source code and subscription business models, disruptions across the four elements (business/economics, society, industry, and technology) have always occurred. What's different now is that there are entities that have been better able to take advantage of combinations of available funds, societal change, democratized technology platforms, etc. than traditional companies have historically been. When they've succeeded, they've been incredibly disruptive (Google, Apple, AWS, Microsoft with cloud, container technology, SaaS models); when they've failed, they often fail spectacularly (e.g., Theranos) (or both with Uber, a parabolic story of disruption). But the moral is, we shouldn't be thinking of digital disruption as a New Thing — it's an old thing wrapped in new clothing. And it's clearly not unique to digital giants. Organizations that are digitally transforming themselves must incorporate wilful intent, model and strategy for digital disruption so that they can scale (up, out, across) effectively.

Since digital transformation addresses components that range from business strategy, to operations, to models, to technical underpinnings and innovations – and since organisations wish to win, not just place or show as a result of transformation – disruption, whether offensive, defensive, self-inflicted, etc. must be part of the strategy and delivery of outcome(s) of transformation.

Of course, not every organisation is prepared to be a disruptor. Different enterprises have different personalities, some of which are less amenable to new technologies, some of which are anxious and adept at taking on new models, and others of which may prefer to wait and see what their peers to before considering innovative or (shudder) disruptive strategy or tactics. Fortunately, this isn't an all or nothing endeavour, and organisations can consider a continuum that looks like the following:

Automate -> Optimize -> Innovate -> Transform -> Disrupt

Organizations can choose – per line of business or entirely – to focus efforts on any one of these. They might take then on in sequence, stepping toes into the water before implementing grand changes.

Technology and service providers (TSPs), meanwhile, have an obligation to help their customers – these enterprises – understand the value, risk, costs, and rewards associated with employing and deploying their products and services along these lines as well as (sometimes) pursuing such change.

The TYPES of products and services might also be tailored to each stage (e.g., should RFID be pursued as a way to track goods in our supply chain, or should we consider blockchain?).

Sometimes, they may help their customers determine when and where to find opportunities (which we might characterise as helping parse opportunities within a value chain or through business moments within a value chain). But all participants have roles in this continuum.

It's important to recognise that this IS a continuum in that these are all flavours of change that can and should be considered strategically — and that includes disruption. It should be a conscious and wilful decision to make disruption part of a corporate strategy, and organizations must realise that digital disruption is not simply the outcome of mixing new technology with "digital giantism".

Everyone has an innate ability and will to be digitally disruptive – you just "have to wanna", in the words of the great George Carlin.

David Yockelson is a Research Vice President at industry analysts Gartner, Inc.

PDF 2.0 adoption accelerates

A year after the publication of ISO 32000-2 (PDF 2.0), software utilising the latest iteration of the PDF specification is beginning to emerge. Firms including Adobe Systems, Global Graphics, callas software, Nitro PDF, PDFlib, PDF Tools, and others have all announced their support for PDF 2.0. On July 23, 2018 alone, three distinct announcements of PDF 2.0 support from Adobe, Agfa and OneVision were released.

"Welcome as these initial announcements are, we know that many other developers are also working hard on many different aspects of PDF 2.0 support," said Duff Johnson, Executive Director of the PDF Association. "Developers are seeing the value in the new ISO specification and are responding accordingly," he said.

PDF 2.0 was published in July, 2017 by ISO's TC 1717 SC 2 WG 8. The first revision of the PDF specification since 2007, PDF 2.0 is also the first post-Adobe version of PDF.

Slow Advance in Data and Analytics: Gartner

A worldwide survey* of 196 organisations by Gartner, Inc. showed that 91 percent of organisations have not yet reached a "transformational" level of maturity in data and analytics, despite this area being a number one investment priority for CIOs in recent years.

"Most organisations should be doing better with data and analytics, given the potential benefits," said Nick Heudecker, research vice president at Gartner.

"Organisations at transformational levels of maturity enjoy increased agility, better integration with partners and suppliers, and easier use of advanced predictive and prescriptive forms of analytics. This all translates to competitive advantage and differentiation."

The global survey asked respondents to rate their organisations according to Gartner's five levels of maturity for data and analytics. It found that 60 percent of respondents worldwide rated themselves in the lowest three levels.

The survey revealed that 48 percent of organisations in Asia Pacific reported their data and analytics maturity to be in the top two levels.

This compares to 44 percent in North America and just 30 percent in Europe, the Middle East, and Africa (EMEA).

The majority of respondents worldwide assessed themselves at level three (34 percent) or level four (31 percent). Twenty-one percent of respondents were at level two, and 5 percent at the basic level, level one.

Just 9 percent of organisations surveyed reported themselves at the highest level, level five, where the biggest transformational benefits lie.

"Don't assume that acquiring new technology is essential to reach transformational levels of maturity in data and analytics," said Mr. Heudecker.

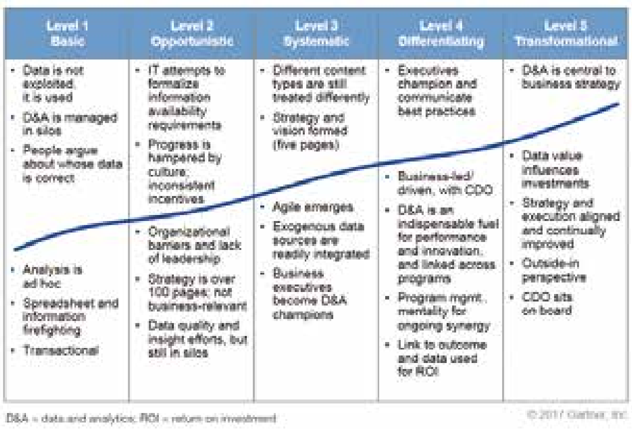
"First, focus on improving how people and processes are coordinated inside the organisation, and then look at how you enhance your practices with external partners."

Improving process efficiency was by far the most common business problem that organisations sought to address with data and analytics, with 54 percent of respondents worldwide marking it in their top three problems.

Enhancing customer experience and development of new products were the joint second most common uses, with 31 percent of respondents listing each issue.

Enterprise reporting

The survey also revealed that, despite a lot of attention around advanced forms of analytics, 64 percent of organisations still consider enterprise reporting and dashboards their most business-critical applications for data and analytics.



Overview of the Gartner Maturity Model for Data and Analytics

Similarly, traditional data sources such as transactional data and logs also continue to dominate, although 46 percent of organisations now report using external data.

"It's easy to get carried away with new technologies such as machine learning and artificial intelligence," said Mr. Heudecker.

"But traditional forms of analytics and business intelligence remain a crucial part of how organisations are run today, and this is unlikely to change in the near future."

Organisations reported a broad range of barriers that prevent them from increasing their use of data and analytics.

There isn't one clear reason; organisations tend to experience a different set of issues depending on their geography and current level of maturity.

However, the survey identified the three most common barriers as: defining data and analytics strategy; determining how to get value from projects; and solving risk and governance issues.

In terms of infrastructure, on-premises deployments still dominate globally, ranging from 43 to 51 percent of deployments depending on use case. Pure public cloud deployments range from 21 to 25 percent of deployments, while hybrid environments make up between 26 and 32 percent.

This research was conducted via an online survey in the second quarter of 2017. In total, 196 respondents from EMEA, Asia Pacific and North America completed the survey. Respondents spanned 13 vertical industry categories, and revenue from "less than $100 million" to "$10 billion or more."

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ABBYY is a leading global provider of technologies and solutions that help businesses to action information. The company sets the standard in content capture and innovative language-based technologies that integrate across the information lifecycle. ABBYY solutions are relied on to optimize business processes, mitigate risk, accelerate decision making and drive revenue. Thousands of companies process more than 9.3 billion pages of documents and forms annually using ABBYY technologies. ABBYY solutions and products are used by many of the largest international enterprises and government organizations, as well as SMBs and individuals. ABBYY technologies are licensed by world-leading hardware and software vendors to provide Image Pre-Processing, OCR, Data Capture and Format conversion capabilities for their products. ABBYY technologies and products, available on a number of platforms (mobile, desktop and server) and a variety of operating systems (Windows, Linux, Mac, iOS, Android, etc.), include FineReader, PDF Transformer, FlexiCapture, Recognition Server, Mobile Imaging SDK, Lingvo, and ABBYY Compreno-based
Semantic technologies.

DocsCorp

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DocsCorp is a leading provider of productivity software for document management professionals worldwide. Our offices and products span the globe with over 500,000 users in 67 countries. Our clients are well known and respected global brands that rely on DocsCorp for their technology needs. Our mission is to provide document professionals who use enterprise content management systems with integrated, easy-to-use software and services that extend document processing, review, manipulation and publishing workflows inside and outside their environment to drive business efficiency and to increase the value of their existing technology investment.
Our solutions include:

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

Kapish

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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 record-keeping a breeze. Kapish was recently awarded the HPE Information Management & Governance – Partner of the Year 2017 award.

Fujitsu Australia

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

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

Brother

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

Committed to the advancement of printing and scanning technologies, Brother also offer business solutions designed to fit perfectly in the SOHO, SMB, SME and corporate environments. With a skilled team specialising in assisting their customer's corporate growth, Brother's business categories such as portable printers and scanners, commercial desktop scanners and high volume corporate printers can help businesses achieve in any industry. With resellers located Australia-wide, readily available product and a locally based product support team, Brother is always 'at your side'. Contact the Brother Commercial Division today to find the best solution for your business requirements

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Web: https://www.alarisworld.com/en-au

The Information Management division of Kodak Alaris is now Alaris. Our new name is not about reinvention. It's about reinterpretation.
Our division is a leading provider of information capture solutions that simplify business processes. We help the world make sense of information with smart, connected solutions powered by decades of image science expertise. Alaris brings order to data chaos, making sense of business information, reliably and with absolute precision. Our smart, connected solutions bring together document scanners, software and services to help organizations achieve their digital transformation and process automation goals.
The award-winning Alaris portfolio is powered by decades of digital image science expertise, and delivered through our global network of channel partners.

EzeScan

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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 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 into 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 standards compliance.

OPEX

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OPEX is a recognised global technology leader in document imaging, high-speed mailroom automation and material handling.
Since 1973, OPEX systems have provided performance enhancing workflow solutions and cost-effective results to thousands of organisations worldwide. OPEX systems are designed for a wide variety of industries including financial services, insurance, healthcare, government, retail, non-profits, utilities, telecommunication, service bureaus, educational institutions, and fulfillment 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 an Epson scanner - outstanding results, simple operation and value for money.

Castlepoint Systems

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Castlepoint is a records and information management solution designed to manage all an organization's electronic records, in any business information systems (BIS). The way the Castlepoint Manage Information Everywhere (MIE) model works is by leaving the BIS unchanged and unaffected. The users just keep working in their own business systems, as normal.
MIE silently monitors every BIS for new items (documents, emails, tweets, rows, web pages, images or other records). When a new item is identified, MIE uses artificial intelligence to register it, or link it to an already registered record.
We developed Castlepoint to fill a gap. To allow organisations to leverage all the collaborative and usability features of business systems, while also providing comprehensive and compliant records management tools.

TextGrabber Adds Realtime Translation

ABBYY has announced a major update to TextGrabber for Android and iOS. The application now translates text in real time online and offline and is free to download with a premium subscription for a number of features.

The updated TextGrabber instantly captures text in 61 languages and translates it in real time to 104 languages online and 10 languages offline. The app allows users to translate text of any colour on any background directly on the camera preview screen eliminating the need to take a photo, crop it or highlight the text. In contrast to other translation apps, it does not require users to download languages in order to translate offline.

TextGrabber automatically identifies if the device has access to a stable Internet connection, and if so, uses it to deliver full-text translation into 104 languages in real time. If the device does not have Internet access, the app switches to offline translation, which is essential for travel and everyday situations like understanding menus, street signs, labels, and more.

Offline translation works for 10 languages including English, Spanish, French, German, Chinese, and Japanese. The user also has the option to switch to the offline mode manually in the settings. From now on, TextGrabber for Android is free to download. Upon installation, each user can leverage the full functionality of the app to capture, translate, and share three texts. After the three complimentary full-feature uses are over, they can still digitize texts and save them as notes in the app's internal storage – this functionality is free. If the user would like to access the full functionality again, they are offered to purchase a subscription for $US0.5 a month for the first two months and $US2 a month after that.

Accellion Partners with iManage for Secure File Sharing

File sharing platform Accellion has announced a partnership agreement with iManage to provide unified access to files stored in SharePoint, Salesforce, OneDrive for Business, Box and other content sources. Files are easily located, accessed, edited, and shared, from any location or device.

Available in either a private cloud or on-premise deployment, the Accellion solution provides features such as data encryption in transit and rest, encryption key ownership, and anti-virus (AV), data leak prevention (DLP), and advanced threat protection (ATP).

With the Accellion file sharing and governance platform, iManage users have full visibility into where and with whom outside of the law firm sensitive files are shared and stored as well as who is accessing and sharing them. All file activity is auditable and in compliance with GDPR, NIST 800-171, HIPAA, FISMA, GLBA, and other rigorous regulations.

https://info.accellion.com/accellion-imanage-integration

ActivePDF 3 adds Search and Redact

ActivePDF has announced the release of Redactor 3.1.0. which provides users the ability to search and redact specific words, text, images, or entire pages when creating PDF files so viewers cannot see or search for sensitive information.

Search and Redact: Redactor 3.1.0 enables organisations to accurately search and redact data while creating PDF files. Sensitive data such as ID numbers, phone numbers, addresses, etc., can be easily and accurately redacted within a single API.

Proper redaction is essential for regulatory compliance across a wide-range of industries, including legal, financial, securities, or government agencies that deal with sensitive information on a daily basis. Unlike other redactor tools on the market, Redactor 3.1.0 prevents selected viewers from recovering redacted data. For example, a legal team might introduce a document into evidence, but must protect sensitive information irrelevant to the case. Sensitive data is redacted so viewers cannot see, search, or recover that information.

Not only does Redactor 3.1.0 prevent viewers from searching and recovering redacted data, it also protects from and allows other actions. For example, a government agency may provide documents to an individual with a security clearance to view some, but not all, information in a classified document. With Redactor, the individual could not search, highlight or copy redacted data. However, the unredacted content remains visible, fully indexed and searchable.

Redactor 3.1.0 removes and replaces text and images with a colour-filled box. Redaction removes and blocks out portions of the text or image, such as a specific word or an entire page so viewers no longer see that information in the PDF output file.

Users can censor something as simple as a name or more complex information such as a long string of numbers.

www.activepdf.com

conceptClassifier enhances taxonomy and workflow

Concept Searching, the developer of semantic metadata generation, auto-classification, and taxonomy management software, has launched Release 5.4.6 of its flagship conceptClassifier platform. Highlights include new and improved interfaces for taxonomy and workflow management, as well as advanced reporting features. This Release improves speed and usability, enabling users to further leverage the power of the conceptClassifier platform to interrogate their data, and perform auto-remediation where appropriate.

conceptTaxonomyManager is a simple-to-use, intuitive user interface designed for subject-matter experts without IT or information science expertise, to build, maintain and validate taxonomies for the enterprise. conceptTaxonomyManager is highly interactive and provides realtime validation of changes made to taxonomies. This Release provides additional user experience options, such as shortcut actions, contextual help, clue filtering, and rule duplication expedition.

New functionality has also been added to conceptTaxonomyWorkflow, an optional component that can perform an action on a document, following a classification decision when specific criteria are met. This enables decision making that enhances organizational performance and drives down costs, but more importantly enforces corporate and legal compliance guidelines.

Other core improvements available in this Release include extending optical character recognition (OCR) support, to enrich the classification engine with new rule types and increase file and web crawling performance.

http://www.conceptsearching.com

No-Code Office365 App Creation

Crow Canyon Software has released NITRO Studio, described as an application creation platform for SharePoint and Office 365. The Studio gives companies the power to run many business processes on SharePoint, thereby saving time and increasing business efficiency.

With NITRO Studio, companies can move off legacy systems and inefficient paper, email, or spreadsheet tracking processes and use SharePoint much more effectively to accomplish business goals. The Studio, which runs in SharePoint 2013, 2016, and Office 365, includes a Forms creation tool, Application Portals, a Workflow Engine, a Report Center, and more. It is easily installed into a SharePoint farm or tenancy. With minimal training, power users can start creating the applications they need for their company's success.

Crow Canyon originally developed NITRO Studio to power up its premium applications for SharePoint & Office 365. These applications -- which include IT Help Desk, Customer Support.

Asset Management, Work Orders, and Onboarding -- run on the NITRO Studio. With many years running in SharePoint environments worldwide, NITRO Studio is a well-tested and mature product.

Now, with the release of NITRO Studio to the general public, this comprehensive platform is available to SharePoint and Office 365 users. It comes with a 30-day trial and can be licensed per Site, Site Collection, or Enterprise-wide.

https://www.crowcanyon.com/

Portable Biometric Data Security

Dataram Memory ("Dataram"), an independent technology solutions provider for enterprise and data centre environments, has announced the launch of QBKEY, a portable biometric security device that helps users encrypt their data – allowing them to securely save it anywhere, anytime.

QBKEY Features:

- Safely and securely store important and sensitive items including personal photos, credit card details, medical records, tax documents, and passwords
- Store encrypted data on any local or network storage device, even a smartphone
- Create back-up copies of encrypted data to guard against virus, malware or ransomware
- Share encrypted data with other QBKEY users
- Authenticates up to 3 fingers
- Interlocked and multi-level encryption using the AES, RSA and ECC algorithms
- Windows software application included (Windows 7 or later)
- Secure Interlocked Encryption: created using a Quantum True Random Number generator making each them truly unique and one of a kind. No passwords are required. Multiple encryption keys are used to secure each file, all of which are tied to the hardware, software, and owner of the device, helping ensure only the person(s) that should access that data, actually have access to that data
- Biometric Authentication System: equipped with a high quality robust 3D fingerprint sensor, eliminating the use of potentially vulnerable passwords
- Secure File Browsing and Sharing: data is not exposed when sharing or editing
- Support for InterPlanetary File System (IPFS): share encrypted files with other QBKEY holders using the IPFS, a peer-to-peer distributed network

QBKEY comes with two matched biometric devices, two USB Type C (USB-C) to Type A (USB-A) cables. Although both devices are identical, the second device is intended as a recovery key. Data is not stored on the QBKEY devices. QBKEY is available on the Company's product website at www.qbkey.com , and online retailers including Amazon.com and eBay. The MSRP is $US199.99.

http://www.dataram.com/

Smart Capture goes with the Flow

Ephesoft has announced the release of its new Swagger/OpenAPI-web services for Ephesoft Transact, a simplified application programming interface (API) enabling the integration of Ephesoft's document capture solutions into any OpenAPI-compliant application such as Microsoft Flow. Formerly known as the Swagger Specification, OpenAPI is the world's standard for defining RESTful interfaces.

This release is claimed to mark the first Swagger/OpenAPI-compliant document capture integration, making it possible for developers and non-developers alike to leverage Ephesoft Transact to classify documents and extract information via a simple web services interface. Users can now quickly add document capture functions to applications, removing the need for manual data entry or human intervention.

Ephesoft Transact is a smart document capture and extraction solution that utilizes supervised machine learning to capture, classify, extract, validate and deliver intelligence that transforms unstructured documents into actionable data.

The enhanced services are available to any current or prospective customer with access to Ephesoft Transact in the cloud or on-premises, and who use OpenAPI-compatible platforms, including Flow, K2 and Nintex.

https://www.ephesoft.com

Engineering Document Management

eQuorum Corporation has released Engine-Box.com, it describes as a fully-fledged Engineering Document Management SaaS, requiring no software, mobile apps, or JAVA. Engine- Box.com is available through subscription pricing, and provides both concurrent and named user subscription options.

Engine-Box.com includes the full functionality of ImageSite, eQuorum's engineering content management system. It is the next generation cloud document management solution with integration to many of the major CAD applications with the latest file security and version control alongside of Amazon Web Services' secure servers and compliance.

Enigne-Box.com is a completely HTML5 application, meaning all users need is a web browser to access, view, secure, distribute, and collaborate with files, without any software, on any platform, including iOS, Android, Windows, and more. Files are easily accessible from anywhere using totally secure connections, using any device – without synchronising software.

https://www.engine-box.com

Coding alternative for medical records

Eurofield Information Solutions (EIS) has developed a new solution called TurboGrouper for coding and grouping tasks which are fundamental for processing medical records and funding for all Australian hospitals. TurboGrouper requires no additional or specialised hardware or support and the solution interfaces to DXC Technology's i.PM and WebPAS Patient Administration Systems.

Grouping of coded medical records into Australian Refined Diagnosis Related Groups (AR-DRGs) is essential for Activity Based Funding (ABF). AR-DRGs allow health authorities to provide better management, measurement and payment for high quality and efficient health care services. TurboGrouper was built, in conjunction with clinical codes and Health Information Managers (HIMs), to provide an easy-to-use, end-to-end medical coding and grouping solution that delivers fast, accurate and consistent results. TurboGrouper has been reviewed by the Independent Hospital Pricing Authority (IHPA) and the Australian Consortium for Classification Development (ACCD) and received a Certificate of Acceptance.

For more information, visit www.TurboGrouper.com.au or call +61 (0)2 9411 3711

Micro Focus File Governance Suite

Micro Focus has announced the general availability of Micro Focus File Governance Suite , designed to help users archive and recover high-value targets faster than traditional backup systems, and assist with government and privacy mandates, including the General Data Protection Regulation (GDPR).

With this suite, organisations can protect highly sensitive data from damaging ransomware attacks – giving IT more capacity to meet business demands, rather than spending time recovering and repairing critical data.

According to Verizon's 2018 Data Breach Investigations Report , ransomware was recently identified as the world's biggest security breach threat. "Ransomware is the top variety of malicious software, found in 39% of cases where malware was identified."

In addition to protecting data through policy, the File Governance Suite helps organisations be proactive through smart analytics. The solution allows authorised users to analyse the content of files. Files that include personal or secure information can then be automatically moved to more secure locations, or be deleted (when appropriate).

Micro Focus File Governance Suite combines:

- Micro Focus File Dynamics – a new network and file system management and protection solution that automates an extensive set of management tasks through identity and target-driven policies.
- Micro Focus File Reporter – a network file system analysis tool that analyses network file systems and details file storage information in order to optimize and secure networks, helping organisations meet strict compliance standards.
- Features of the newly released suite include:
- Data Protection: Protect high-value targets from threats such as ransomware with Epoch Data Protection policies - protected from direct user access and that can only be accessed through a proxy account.
- Data Analysis and Remediation: Identify sensitive files and move them to a secure location, protecting data from unauthorised users.
- Automated Data Management and Cleanup: Specified policies automate the cleanup of data, including most unstructured data on the network.
- File Classification: PII, PHI, and PCI discovery that is tied to pattern matching.
- Data Ownership: Allows those who are closest to and understand the data to be able to take action on the data.

https://www.microfocus.com/products/file-management/file-reporter/

Smart Data Discovery platform

Io-Tahoe LLC , a developer of machine learning-driven smart data discovery products, has announced the General Availability (GA) launch of the Io-Tahoe smart data discovery platform.

The GA version includes the addition of Data Catalog, a new feature that allows data owners and data stewards to utilise a machine learning-based smart catalogue to create, maintain and search business rules; define policies and provide governance workflow functionality.

Io-Tahoe's data discovery capability provides complete business rule management and enrichment. It enables a business user to govern the rules and define policies for critical data elements. It allows data-driven enterprises to enhance information about data automatically, regardless of the underlying technology and build a data catalogue.

Increasing governance and compliance demands have created a dramatic opportunity for data discovery. According to MarketsandMarkets, the data discovery market is estimated to grow from $4.33 billion USD in 2016 to $10.66 billion USD in 2021. This is driven by the increasing importance of data-driven decision making and self-service business intelligence (BI) tools. However, the challenge of integrating the growing number of disparate platforms, databases, data lakes and other silos of data has prevented the comprehensive governance, and use, of enterprise data.

Io-Tahoe's smart data discovery platform spans silos of data and creates a centralised repository of discovered data upon which users can enable Io-Tahoe's Data Catalog to search and govern. Through convenient self-service features, users can bolster team engagement through the simplified and accurate sharing of data knowledge, business rules and reports.

https://io-tahoe.com/product

Adobe Signs into Life Sciences/Pharma

Adobe Sign has added new enhancements for life sciences and pharmaceutical companies, added more forms automation functionality by including a new way to collect online payments, and announced new cloud-based digital signature partners.

Adobe Sign now has the necessary controls to comply with FDA 21 CFR Part 11, the globally-accepted regulation for electronic records and signatures in the biopharma industry, through multi-factor e-signature authentication or the more rigorous certificate-based digital signature authentication.

New Adobe Sign capabilities include verifying signer's identity at the time of signing and requiring the signer to specify a reason for signing, both of which are requirements specified by FDA 21 CFR Part 11.

In addition, through Adobe's partnership with industry leading trust service providers such as Tran Sped, organisations are able to sign documents which meet the SAFE-BioPharma trust requirements.

It often takes multiple steps to fill, sign, pay and send forms such as sales contracts, invoices, new account applications, charitable donations and online order forms.

Adobe has partnered with payment gateway provider Braintree, a PayPal service, so that Adobe Sign and Braintree customers can easily and securely collect payments from customers as they fill and sign forms.

Braintree supports 130-plus currencies and provides merchant services in 44 countries so transactions can be completed on any device across the globe.

Integration of Adobe Sign with SAP SuccessFactors means offer letters and onboarding forms can be signed with Adobe Sign directly from the SAP SuccessFactors workspace. Once signed, approved documents are automatically stored in SAP SuccessFactors for a seamless, end-to-end digital workflow.

Foxit PDF Compressor for Linux

Foxit Software has released a PDF Compressor Command Line Tool specifically developed for organizations that use Linux. The new solution integrates ABBYY OCR technology to allows Linux shops to automate their paper to digital document conversion process through the creation of highly compressed and searchable PDF/A compliant files.

Foxit's PDF Compressor is designed to apply advanced image compression to scanned documents, reducing file size so they are easier to share and transmit, more accessible, searchable, and easier to process on a large-scale basis.

The PDF Compressor leverages mixed raster content (MRC) layer-based compression technology that compresses with ratios of 1:100 or better. Outstanding image quality and text legibility are preserved, while storage costs and bandwidth requirements are drastically reduced.

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

Digitise with Newgen OmniScan 4.1

Newgen Software has released OmniScan 4.1, a distributed document scanning solution for high-volume production environments. It accelerates business processes by capturing data and transforming it into actionable business information.

"This version will help organisations drive enterprise-wide digitisation and access relevant information for business use. It provides flexibility to scale operations from hundreds to millions of documents in a day," said Diwakar Nigam , Chairman and Managing Director, Newgen Software.

Key features include:

- Auto Face Detection: Enables automatic detection of photos from scanned images and associates them with the document
- Auto Capture Index Values: Auto captures system field values, such as job number, location and date, reducing manual data entry. Further, allows tracking employee productivity by user name and department
- Template Management : Maintains consistency and saves time by allowing users to reuse templates defined in OmniProcess
- MSI Installer: Facilitates remote installation of the software through group policy

OmniScan 4.1 can be integrated with SAP and Microsoft SharePoint. It has use cases across verticals such as Banking, BPO, Insurance, Telecom, Healthcare, Legal, and Public sector.

For more information, visit http://www.newgensoft.com/

Contact: 02 8046 6880 email: info@newgensoft.com

Epicor updates DocStar ECM Solution

Epicor Software as announced the newest release of the DocStar Enterprise Content Management solution. The new release includes document capture and DocStar ECM Forms enhancements, expanded mobility, and new DocStar ECM PackageWorks case management functionality. In addition, the solution supports greater productivity and responsiveness by providing anytime access to capture, process, search, retrieve, share, and collaborate around documents critical to business transactions. Available for iOS and Android devices, the DocStar ECM mobile app delivers secure and quick access to the DocStar ECM repository, enabling users to gain timely workflow approval from their mobile devices anywhere, anytime. Users can email files in the same manner as the DocStar ECM desktop version, where document access is granted in a seamless, secure fashion via a unique URL or attachment and is password-protected.

DocStar ECM PackageWorks supports digital document package compilation with intelligent workflows for comprehensive case management. This provides a secure platform to gather, group, review, approve, and distribute documents quickly and easily in a consistent and accurate process. DocStar ECM PackageWorks streamlines collecting and managing key documents as part of the case management process.

Key enhancements include improved optical character recognition (OCR) engine speed and accuracy, barcode and patch code recognition, and document splitting. Users can onboard documents more quickly and efficiently with preset, document-specific settings for optimal quality. Additionally, users can extract more accurate document text for easier document indexing and searches. Improved document splitting and automated workflow assignment allow for more accurate and faster document processing with fewer exceptions.

Improvements to DocStar ECM Forms include designer guidance, drag-n-drop, copy and paste, and forms-element placement sizing. Alignment tools enable faster and easier form creation and existing-forms modification.

www.docstar.com www.epicor.com

Workshare adds email and chat to Document Comparison solution

A new feature for Workshare's document comparison solutions, Selective Compare, enables users to run a redline comparison on snippets of text from emails, chat or pasted from a file and instantly see the differences, rather than having to review an entire document. Users are able to copy any type of text, table, image or code from anywhere, paste it into the new Workshare tool and click Compare. Any differences are then clearly displayed in the Workshare Compare environment.

Workshare Selective Compare is generally available in the next release of Workshare 9.5.3. It can be deployed as a traditional Windows application on the desktop or as a cloud-delivered app that can run inside browsers, mobile devices, PCs, or be embedded in other document creation, sharing and management platforms. Comments can be made directly in a document and it's possible to launch a comparison from Outlook or your DMS with full integration into iManage, NetDocuments, HighQ and other leading document management applications. Features include:

https://www.workshare.com/product/compare

Securing Personal Data in Motion

A solution to discover, secure and govern personal identifiable information (PII) while "in flight" - as it arrives from a batch or streaming data source or moves between compute platforms - has been launched by StreamSets Inc.. Designed with data privacy regulations in mind, StreamSets Data Protector is promised to reduce the risk of expensive and embarrassing violations.

The company says, until now, solutions for handling personal data have relied on "after the fact" scanning of data stores which, while valuable, can only discover sensitive data once it lands and potentially has already been shared. Companies are missing the opportunity to encrypt, mask, generalise or discard personal data as it arrives rather than storing it in the clear.

StreamSets Data Protector extends protection to the point of initial data ingestion, leveraging Dataflow Sensors that are part of StreamSets Data Collector. These sensors discover PII by comparing incoming data to built-in patterns such as national ID, tax ID or driver license numbers, bank account or credit card numbers, or IP addresses, or additional patterns created by the customer. Without the automation StreamSets provides, laborious hand-coding is required to continuously check each data source against dozens or hundreds of PII patterns. This approach becomes impossible, especially as unstructured data and data drift - unexpected changes to the structure and semantics of the incoming data - come to the fore.

www.streamsets.com

Organisation charting with Office365

KWizCom, a developer of SharePoint web parts, add-ons and apps for Office 365 (SharePoint Online), has unveiled a new add-in for Office 365 customers – Org. Chart App (SPFx). The newly released Org. Chart App is a SharePoint client-side app that utilises the SharePoint Framework (SPFx) and displays organisation breakdown structure chart. This SharePoint Online app enables business users to easily find employees and contact them.

SharePoint Online users can display their Org. chart based on various data sources, such as SharePoint lists, MS Excel files. This means that they can easily implement their Org. chart, no matter where their data resides! Moreover, if a company has thousands of employees in the organisation, Org. Chart App allows the users to easily find employees by using a highly-configurable filtering form.

http://www.kwizcom.com/sharepoint-apps/org-chart/overview/

Teaching Office Robots Human Techniques

By Henry Patishman

Sixty-five years ago, the world learned about ENIAC, the first smart calculator. Ever since, computing technology has progressed in leaps and bounds in response to the challenges of storing, managing and extracting value from an ever-increasing volume of data. Today, the exponential growth of real-time data generation is posing even greater challenges for individuals and businesses. How can companies tame this huge stream of data? How can they analyse zettabytes of information in emails, documents, news and comments in social networks and utilize them for better business outcomes?

These and other challenges have motivated companies like Amazon and Google to develop and introduce AI-powered solutions in their services. Their successes have inspired major players in banking, retail, medicine and other industries to extensively invest into and in many cases fully acquire startups in the field of AI. Today, companies and their customers all over the world are already reaping benefits from AI. In banks, it helps to check information for loans. In the energy sector – assesses the wear of equipment, in health care-determines the diagnosis of patients. According to Infosys, 86% of the world's major organizations are already using or starting to implement AI. Such pilots have started to bring the first set of results: they have shown to attract customers while also saving time and money for these companies.

Robots are increasingly able to perform both manual and routine cognitive tasks. They came into production in the 1960s, replacing people on assembly lines in factories, especially in countries where labour is expensive. Now, robotic process automation (RPA) is poised to take over offices. A combination of factors including growth of global competition, global rise in labour cost, and the need to reduce costs of business processes while increasing accuracy and repeatability of outcomes have made the RPA onslaught on modern offices inevitable. As the volume of information increases, so is the need to reduce the cost of its processing. With software robots potentially being able to automate up to 70% of office work, hiring new people is no longer the best option. This partly explains the dizzying growth of the technology: the RPA market is expected to surge to $US2.9 billion from a mere $US250 million in 2016, a tenfold increase, according to Forrester.

A colleague without a cubicle or walls

Contrary to common perception, software robots are not mechanisms on wheels, but are "virtual" employees who work side by side with humans albeit using a computer interface. In accounting, organizations use RPA to extract and transfer data between accounts and for transactional reporting and budgeting. In human resources, RPA helps automate HR tasks, including on-boarding and off-boarding, updating employee information and time-sheet submission processes. Companies in the financial services industry can use RPA for foreign exchange payments, automating account openings and closings, managing audit requests and processing insurance claims.

For a long time, the most popular way to automate these processes was through cross-integration of existing information systems. But as technology advances apace, legacy systems are becoming the most significant barrier to business. With the emergence of software robots came an array of benefits. Robots do not require salaries, do not rest and do not get tired and make fewer errors than humans. They are also easier to deploy and require no extra office space. In most cases, the payback period is just 6-9 months. So one can assume that in the next 3-5 years, the demand for these technologies will grow actively wherever it is necessary to quickly process a large amount of information on a given algorithm.

Of course, for now, the capabilities of software robots are rather limited: they do not know how to analyse complex data types, especially unstructured ones. Meanwhile, up to 80% of business-relevant information originates in unstructured form, primarily text: contracts, letters, news. As new opportunities appear that accelerate and simplify the introduction of intelligent technologies, office robots will be smarter with AI. These include open source libraries like Tensorflow, free courses in machine learning and new types of neural networks.

What to teach office robots

As office robots increasingly become part of value creation processes in the service sector, the former paradigms of automated manufacturing are being put into perspective again. The next wave of development should see businesses teaming up with technology developers to adopt a new approach to machine learning: competitive neural network, reinforcement learning and transfer learning. While these approaches are relatively new, they are bound to play a leading role in the development of AI in the near future.

How do competitive neural networks work? Let's say two machines receive similar datasets at the point of origination. Then one of them starts to create new information based on them – for example, images of documents that look authentic. The task of the second system is to assess how convincing the outcomes are. Children learn this way – for instance by playing ball with each other after learning the rules of the game and the basic techniques. This too, is how unmanned vehicles learn about dangerous traffic situations and this is how ABBYY technology learns to extract meaningful information from various sources.

In reinforcement learning, the machine analyses the environment using a virtual model that mimics the features of the external environment. That is how AlphaZero taught itself to beat the world's best chess-playing computer program by calculating the combination of moves and choosing the winning one. These developments will soon move from games to business, where they will help investment analysts and risk managers to choose the most profitable option for the company. Finally, transfer learning offers an opportunity to use the same neural network for similar but not necessarily identical tasks. This explains how ABBYY technologies work. For example, if the solution is able to analyse labour "contracts, the same system can be taught to work with sales contracts, which speeds up and reduces the cost of app development.

Within the next three years, these methods will be increasingly used to train systems in many large projects as they are simpler and cheaper to implement. The greatest success will be achieved by organizations that not only correctly combine the capabilities of the artificial and natural intellect, but also functionally combine RPA, AR, AI and other ultramodern solutions to achieve a synergistic effect from their use. Such an approach will lead to the creation of systems that can be truly called intelligent. In the meantime, businesses should start delegating tasks to software robots. They will not replace us in the workplace, but they will become our obedient hands, so that we can work more with our heads.

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

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corpsolutions.brother.com.au/portable-print-solutions


Fast & Efficient Document Management
EPSON
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