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Finance looks to a new path to digital record-keeping nirvana

More than three years into its multi-million dollar quest to revolutionise digital record-keeping practices across Federal government, Australia's Department of Finance has announced another shift in direction and a "review" of the current moratorium on new investment in records management solutions.

Finance is still keen to migrate to as-yet-undefined next-generation technology platform to automate the practice of keeping records, an initiative initially announced in 2015, but is now asking for vendors to submit to a "co-design process" to achieve its aims. At an industry briefing in July 2018, Kayelle Drinkwater, Finance Assistant Secretary, Accountability and Reporting, announced that a Request for Proposal (RFP) would be made available in October 2018 leading to a panel of qualified vendors to be established in 2019.

Ms Drinkwater has since left the Department and the RFP has now transformed into a Request for Feedback (RFF?).

According to a new Discussion Paper: "Before we begin to establish requirements and a sourcing approach, Finance is seeking feedback on:

1. the use of a co-design approach with industry and entities to determine the most appropriate sourcing arrangements and a statement of requirements; and

2. whether the capability maturity approach is a useful"

Finance has also asked that all proposed digital record-keeping solutions are compatible with the Australian Government Records Interoperability Framework (AGRIF), a new standard that it is developing but is yet to be completed.

According the new Finance Discussion Paper, "In early 2018, Finance undertook a 12-week Demonstration of Concept (the Demonstration) to test the concept of automating records capture and categorisation via machine learning and semantic data technologies. Through the Demonstration, it was concluded that while the Government is best placed to describe its functions, industry is working towards automation and would be best placed to provide digital records management systems that would be compatible with the government developed Australian Government Records Interoperability Framework (AGRIF).

One industry vendor responded, "I think this means they have decided it is all too hard and could one or more of you vendors do it for us at your cost but to our theoretical and incomplete design?

"I guess it will be one of those government projects that goes on for years and years costing a fortune and then is finally cancelled because technology has passed it by."

There is also industry concern that the co-design approach (and this whole project overall) puts a disproportionately heavy burden on SMEs.

"It's a much heavier burden for SMEs to jump through these ever-changing hoops than it is for the majors. This approach will produce a heavy bias toward larger players and multinationals and will further hurt local records management technology providers/vendors/suppliers," noted one Solution Provider.

"This is especially so when SMEs are already suffering as this project continues to shift its plans and approach, and the (in) famous moratorium continues (in theory) even though Finance seems shy about it"

Another commented, "This document is not a lot to show for 2.5 years of spending, and deliberate lockout of any competition from the scene. They're still trying to solve a problem they created.

"It's not like they needed to urgently prevent any more agencies spending millions on new EDRMS implementations – there are only a few large agencies that don't already have them. The latest paper still doesn't really explain what the problem was, and how they are trying to solve it – and especially doesn't explain how this 3+ year moratorium is actually helping anyone."

Kofax to buy Nuance's imaging division for $US400M in cash

Kofax has entered into a definitive agreement to acquire Nuance Document Imaging (NDI), a division of Nuance Communications.

Nuance eCopy ShareScan software is bundled with many multi-function printers (MFPs), while OmniPage Server is a high-volume OCR, PDF converter and bulk image converter.

Nuance's imaging division accounted for about 11 percent of its revenues last year, and the company has elected to focus on its voice recognition and AI-based solutions.

According to Nuance, the sale will enable it to focus the business entirely on its conversational AI- and cloud- based solutions while simplifying the organization and improving its growth profile.

"Through the acquisition of Nuance's document imaging division, Kofax will drive customer value by adding key technologies, including cloud compatibility, scan-to-archive, scan-to-workflow, print management and document security, to our end-to-end Intelligent Automation platform," said Reynolds C. Bish, Chief Executive Officer of Kofax.

"In addition we will now be able to combine the best capture and print management capabilities available in the market into one product portfolio."

The transaction is expected to close by the end of Q1, 2019.

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Publisher/Editor
Bill Dawes

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Transmit Media Pty Ltd
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Telephone: +61 (2) 9043 2943
Fax: +61 (2) 8212 8985
email: idm@idm.net.au

How Office 365 Machine Learning Will Change Records Management

By Bruce Herzer

Are you feeling like there's an unstoppable, accelerating growth in the volume of data being created within your organization? The folks at Microsoft agree with you. In fact, they've been describing a state of "data explosion," occurring in business today.

Given that ComputerWorld estimates that there are currently 120 million Office 365 commercial monthly active users, looking at this data explosion in the context of Office 365 information management is a key consideration for many businesses.

John Mancini, on a recent AIIM webinar, shared some member survey data highlighting the extent to which people are feeling the effects of data volume growth. 98% of respondents felt that the volume of data and information coming into their organization will at least double in the next 2 years, and 35% said it will grow by a factor of 5 or more.

And while there was an acknowledgement that information management strategies needed to be modernized to meet modern problems (64% completely agreeing with this statement), John suggested that organizations are "running faster and faster" to keep the same level of control over their electronic information, because they are having to deal with the explosion in volume at the same time as putting the means in place to help manage it better.

He also used the visceral acronym ROT to flag the uncontrolled information that RIM practitioners and compliance offers are desperate to avoid: data which is redundant, obsolete and trivial. A full third of respondents suggested the majority of their data is ROT.

How Office 365 can help

Fortunately, Microsoft has recognized this trend and has been investing heavily in new data governance tools that should help organizations get ahead of the shock wave.

On the same AIIM webinar, Nishan DeSilva, Principal Engineering Lead on the Microsoft Office 365 Information Protection Team noted that trying to generate less content isn't the goal.

"As we think about Office 365," he said, "Our whole goal and mission is to really make productivity be the priority… you no longer have to choose between productivity and compliance."

In fact, he continued "We want it (compliance) to be built-in into the productivity service."

With productivity as the number one focus, he described three pillars or investment: import, governance and monitoring.

• **Import** is pulling data in from external sources into the cloud.

• **Governance** is protecting and securing the data in the context of a modern records management system that is still compliant with regulatory requirements for records management.

• **Monitoring** is the oversight and supervision your data.

DeSilva has often spoken about Microsoft "going deep into records management," and some of the newer Office 365 capabilities are pretty exciting.

For instance, at Ignite his team announced the extension of the Security and Compliance Center (SCC) to cover Teams Chats and Teams Channels, letting administers manage data retention within those new heavy-use workloads.

Microsoft has also introduced a simple way to bring in a file plan to the SCC with a new File Plan Manager, and to automate event-based retention using labels and Microsoft Flow.

A Records Manager's secret weapon

What's really cool is the way in which Microsoft is leveraging machine learning to deliver both insight and better security across those pillars.

"We're asking: what is the business, legal and regulatory value of the data? Not all of it is created equal," DeSilva says. "It's all about providing built-in capabilities in the platform."

Microsoft has found in their market research that most people don't declare records, so they're trying to make records declaration easier through auto-classification. At Ignite, Microsoft showed off capabilities that can identify and analyze data beyond rudimentary keywords—actually determining what is in the data for more insight and aid in decision making.

There is a new tab in the Office Security and Compliance Center called the "Classification Assistant" that helps surface these insights. For instance, users often don't know what's important to classify, and administrators often lack visibility into control of the data. So to fill this gap, the Classification Assistant gives administrators detail and visualizations of how much of your data is classified and how much isn't.

They have also built an inventory of "out of the box" classifiers for content like: contract, attorney-client privileged letter, resumes, and job descriptions. You can point these at a SharePoint library, and the system will recommend what content fits that classification—recommendations that an administrator can accept or decline. You can also train the engine by feeding it samples into it to build and refine the classifiers.

For categories where you have no samples available, the system can identify groups of content that look similar, in order to help you identify the right classification.

It can work for structured and unstructured content, and these classifiers can be integrated easily into your ROT analysis or label flow.

Don't quit your day job

Does this mean that Records Managers need to update their resumes and get ready to turn the keys over to the machines?

Not just yet says DeSilva, himself a past Records Manager. On the AIIM webinar, he agreed the role will change with the times but is still a critical one in organizations. He sees capabilities like these making Records Managers more effective in their jobs.

For example, in the past a major pain point for him was developing retention schedules that he then needed to take to individual departments who ultimately had to operationalize them. With the new machine learning capabilities, a Records Manager can take a first step of auto-classifying 80% of content, sharing that with the departmental level managers, and then together training the engine with adjustments.

Making it easy for workers to see, edit, and confirm those classifications at the point they're working with the content in Excel, Word or PowerPoint is another way to ensure content is tagged correctly for both records management and collaboration purposes. In this way, Records Managers will be in a much stronger position to enable policy enforcement and provide bona fide evidence of compliance. It all boils down to what DeSilva describes as "a unified approach to discovery, classification or labelling."

Bruce Herzer manages marketing strategy and operations at Colligo, a leading provider of collaboration apps for the digital workplace.

10th Digital RIM Summit

19 & 20 February | **Melbourne**

Conquer Digital Chaos

Organisations are experiencing the paradox of the information age.

As we gain access to more data, it is becoming harder to catalogue, organise and protect information. So how can you navigate the digital chaos as a Records and Information Management professional?

With guidance and insight from experienced RIM professionals, this summit will provide the opportunity for you to master the skills required to conquer digital chaos.

Explore

- Implement information governance
- Facilitate change management
- Generate collaborative buy-in
- Streamline RIM processes

Featured speakers

Linda Macfarlane
Assistant Director-General, Collection Management Branch
National Archives of Australia

Alex Jones
Chief Information Officer
CitiPower, Powercor and United Energy

Wendy Collis
Manager, Information Management Systems
Department of Finance, Services & Innovation NSW

Trisha Lee
Head of Data Risk & Compliance
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Metadata App Available on Azure

Objectivity, Inc. has announced that its new metadata catalogue and analytics application, D*ChoC (Digital Chain of Custody), is available in beta version on the Microsoft Azure Marketplace.

Enterprises are flooded with data and information, which has led to a global-scale challenge to manage links between millions of discrete pieces of information accurately, reliably, and with sufficient verifiability. In many cases it is important to know where the data came from, who acted upon the data, and the validity of any derived data.

D*ChoC is a digital chain of custody application which easily chains information and the data about the information (or metadata) together from multiple disparate sources allowing for new and better insight at enterprise speed and scale.

D*ChoC is claimed to be the first, full-purposed metadata cloud application with the ability to quickly store, link, trace and discover new intelligence in massive amounts of complex and inter-related without programming.

D*ChoC is powered by Objectivity's core technology so it can handle the demands of government and enterprise applications. By running in a cloud environment, users can get started easily with D*ChoC and have the flexibility to scale and grow with their needs.

"Due to its robust and proven back-end, D*ChoC has the scalability to handle metadata challenges of any known magnitude efficiently and with ease. D*ChoC also has the performance and throughput to handle batch updates, interactive tasks and fast flowing data feeds concurrently with complex queries," said Leon Guzenda, Chief Technical Marketing Officer and Founder of Objectivity.

Users can get started with Objectivity's new cloud-based D*-ChoC beta application on an hourly basis in the Microsoft Azure Marketplace.

Link Fixing for SharePoint migrations

LinkTek Corporation has released the latest version of its LinkFixer Advanced automatic link handling software, Version 4.4, promising to save companies moving to SharePoint thousands of hours in protecting their links during the migration. The technical aspect of the release is that users will no longer be required to map network drives to each SharePoint site collection. This is significant because many organizations have hundreds or even thousands of SharePoint sites.

Users will now simply just specify the URL of each SharePoint site collection to grant LinkFixer Advanced access to all their files stored within them.

Since its launch in 2001, SharePoint has been growing rapidly and now that growth is moving online. Current estimates are that SharePoint is used by 80% of Fortune 500 companies and that is now starting to trickle down to smaller enterprises. As a result, a growing number of organizations are looking for tools to make the migration as pain-free as possible.

www.linktek.com

Leveraging Organisational data in PowerApps

By Leslie Anjan, Prometix

Microsoft has released Common Data Service (CDS) for Power Apps, Flow and Power BI. This Common Data service was the missing piece in Microsoft's vision in connecting data with modern workplace apps in Office 365. This new feature will make end-to-end applications building accessible to a whole new range of more business-minded people, further helping to bridge the gap that has always existed between IT and business.

CDS for Apps will provide secure storage to manage data that can be used by business applications. Data stored within CDS for Apps will use set of entities. An entity is a set of records used to store data, similar to how a SQL table stores data within a database. CDS for Apps also includes a base set of standard entities that cover typical scenarios, but you can also create custom entities specific to your specific requirement and populate them with data using Power Query. App makers can then use PowerApps to build rich applications using this data.

Why use CDS over Data Connectors? Entities (standard or custom) within CDS provide a more secure and cloud-based storage option for your data. These entities let you to create a business-focused definition for your organisation's data for use within specified apps. Benefits as follows:

- Manageability: Both the metadata and data are stored in the cloud. You don't need to worry about the details of how they're stored.
- Secure: Data is securely stored so that users can see it only if you grant them access. Role-based security allows you to control access to entities for different users within your organization.
- Meta Data: Data types and relationships are leveraged directly within PowerApps.
- Business logic: Define calculated fields, business rules, workflows, and business process flows to ensure data quality and drive business processes.
- Easy integration: Entities are available within the add-ins for Microsoft Excel to increase productivity and ensure data accessibility.

Developing an app typically involves data from more than one source, while this can sometimes be done at the application level, there are also cases where integrating this data together into a common store allows for an easier app building experience, and a single set of logic to maintain and operate over the data. The CDS for Apps allows data to be integrated from multiple sources into a single store which can then be used in PowerApps, Flow and Power BI along with data already available from the Dynamics 365 applications. How good is this?

You can integrate or transport data using following methods:

- Scheduled synchronisation: Data which is kept within another application can be regularly synchronised with the Common Data Service for Apps to allow you to leverage other applications data in PowerApps.
- Export using PowerQuery: Transforming data when importing into the Common Data Service can be done through PowerQuery from many online data sources, a common tool used across Excel and Power BI.
- One-off data import: Simple import and export of Excel and CSV files can be used for a one time or infrequent import of data into the Common Data Service for Apps.

Leslie Anjan is a Solution Architect at Prometix and a Microsoft Certified Professional. Contact him at leslie.anjan@prometix.com.au if you have any queries in regard to Common Data Service for Apps.

Database Consultants Australia acquires Tenix Solutions

Australian technology and data management business Database Consultants Australia (DCA) has acquired Tenix Solutions a provider of compliance management, digital platforms, infringement processing and collections services for government enterprises and private sector organisations.

Tenix Solutions and DCA have a long history of collaborating to offer Local Governments across Australia a complete compliance management solution.

"The merge of the DCA and Tenix Solutions businesses gives us the ability to extend this offer to include a full suite of services that can potentially reshape the way municipalities manage their assets", said Declan Ryan, Chief Executive Officer, DCA.

The combined business will offer DCA's client base a broader suite of services and solutions and will add an additional 200 staff to the group.

Primary strategic markets for the combined operations are local government, universities and transport authorities.

DCA are experts in IoT software innovations, database development and data management, and are driving transformation across four core niche markets;

- Smart city and parking technologies
- Higher education research management
- Digital marketing support services
- Hosting and data assurance services

Brother wins 'Good Design Award 2018'

Brother Industries Ltd, the parent company of Brother International Australia, has once again won the highly esteemed Japanese design award: *"Good Design Award 2018"* in 6 categories. The organisation, one of the leading global manufacturers of printers, scanners, and labellers, was competing against 4,789 entries across several categories.

After taking home their first award for their home sewing machine in 1960, Brother has won the same award for 205 different products in total, including the 6 won this year, which included the Desktop Scanner ADS-2200. This will be the 26th consecutive year since 1993 that Brother has won an award.

"The Good Design Award evaluates not only the exterior beauty of products, but also the user experience and environmental impact of the design, as well as the products' ability to present new ideas to society," said Stefanie Dixon, Marketing Manager SMB at Brother International Australia.

"Winning the award recognises the concerted effort by all Brother employees involved in developing, manufacturing and delivering Brother's products and services."

The Good Design Award has been a sole comprehensive design evaluation and communication system in Japan since 1957. Many companies and designers from both inside and outside Japan participate in the activity to enhance the industry through design quality.

The "G Mark" symbol of the award has been recognised widely as a mark representing good design.

Yext Grows a Brain to power Web site AI

Digital Knowledge Management (DKM) developer Yext, Inc. has announced the launch of Yext Brain. The company describes it as a way to allow businesses to create and relate all the facts about themselves in an AI-ready data structure, so they can power their own sites and services and sync with artificial intelligence-enabled consumer services, like search, voice assistants, and chatbots. With Yext Brain, it says businesses can control the facts about them with greater precision and depth than ever before.

"A website is dumb! It can't answer questions. If you want to find something, even if you already know the site contains your answer, you have to guess what page it's on and read the entire thing until you find it. Today with the launch of Brain, Think, and AI-ready Pages, Yext unveils its vision for three revolutionary new DKM technologies that think for you. No more guessing, no more reading, no more thinking," said Howard Lerman , Yext founder & CEO. "

A website makes you do the thinking. A Brain thinks for you."

With Yext Brain, businesses can create digital entities like Events, Locations, Professionals, Products, Limited Time Offers, and more. They can build two-way relationships among entities inside Yext Brain, which help AI-powered services answer detailed questions like which store is hosting an event or which doctor takes which insurance.

Yext Think is an answers engine that can power experiences on a brand's own website — like store locators, menu search, or doctor finders — with direct answers from Yext Brain. This allows a user to ask a business's website things like What time does the Union Square location close? ; I need a dentist nearby who takes my insurance and has appointments available today ; or How many calories are in the bacon cheeseburger? Yext Think makes a business website intelligent, so it can understand a user query and return a smart, direct answer from Yext Brain.

Two new features have been added to Yext Pages: Businesses can create an AI-ready page on their websites for any entity stored in Yext Brain with the click of a button. And with a new library of transactional modules, they can easily include pre-built page modules for appointment booking, ticketing, and more. This means that anything stored in Yext Brain can become its own smart landing page for consumer discovery and action, whether it's a location, event, or a professional's profile.

"Yext Brain allows any business to create digital entities like locations, events, people, and products, and connect them like synapses in a brain," said Marc Ferrentino , Chief Strategy Officer of Yext. "The result is extraordinary. Any business can structure its data to power direct answers to complex consumer questions on its own website or third party services like Google, Alexa, Siri, and more."

http://www.yext.com

Amazon Machine Learning service targets healthcare sector

Amazon is taking another big step into the healthcare industry by announcing a new machine learning service that can extract meaningful information from unstructured EHR data and free-text clinical notes. Amazon Comprehend Medical will allow developers to comb through unstructured electronic health record data to pull out key clinical terms related to a patient's diagnoses, medications, symptoms, treatments, and other interactions with the healthcare system.

"The majority of health and patient data is stored today as unstructured medical text, such as medical notes, prescriptions, audio interview transcripts, and pathology and radiology reports," explained Dr. Taha A. Kass-Hout and Dr. Matt Wood.

"Identifying this information today is a manual and time consuming process, which either requires data entry by high skilled medical experts, or teams of developers writing custom code and rules to try and extract the information automatically,"

"In both cases this undifferentiated heavy lifting takes material resources away from efforts to improve patient outcomes through technology."

The service will be covered under Amazon Web Services' (AWS) business associate agreement, ensuring the privacy and security of patient data that is run through the system.

No data is stored on Amazon servers or used for training the machine learning and natural language processing models, the company said. Instead, customers connect through an application programming interface (API) and retain control of all their data assets.

As a result, Amazon anticipates that healthcare organizations of all sizes and types will be able to harness the potential of unstructured data for a number of high-value use cases.

"Unlocking this information from medical language makes a variety of common medical use cases easier and cost-effective, including: clinical decision support (e.g., getting a historical snapshot of a patient's medical history), revenue cycle management (e.g., simplifying the time-intensive manual process of data entry), clinical trial management (e.g., by identifying and recruiting patients with certain attributes into clinical trials), building population health platforms, and helping address (PHI) requirements (e.g., for privacy and security assurance)," said Kass-Hout and Wood.

Open Standard for Metadata

Non-profit organization ODPi has announced Egeria, a new project that supports the free flow of metadata between different technologies and vendor offerings.

It promises to allow organizations to locate, manage and use their data more effectively.

Egeria is claimed to be the only open source driven solution designed to set a standard for leveraging metadata in line of business applications, and enabling metadata repositories to federate across the enterprise.

Egeria is built on open standards and delivered via Apache 2.0 open source license. The ODPi Egeria project creates a set of open APIs, types and interchange protocols to allow all metadata repositories to share and exchange metadata.

From this common base, it adds governance, discovery and access frameworks for automating the collection, management and use of metadata across an enterprise. The result is an enterprise catalogue of data resources that are transparently assessed, governed and used in order to deliver maximum value to the enterprise.

https://www.odpi.org/

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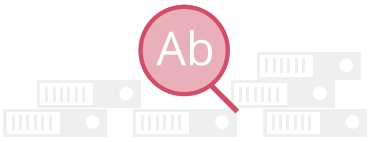

Document Archiving
Captures paper documents and converts them into searchable digital files that include metadata, and which are optimized for digital archiving and records management processes.

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

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

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

- Reduce document and data related Costs — usually by 50%
- Accelerate Transactions
- Fast ROI — usually 3 to 6 months
- Increase Visibility and Control
- Optimisation of data quality
- Reduce Operational Costs

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by Steve Britton

Haven't we all been promised a paperless office for years? And although there have been various attempts and solutions, the latest answer to the paper problem appears to be machine learning and robotic process automation (RPA).

Once you have identified paper as the problem in your organization, the first step towards automating your back-office functions is to understand how you can convert inbound streams from paper to a data file, which may include taking advantage of the following:

• Electronic Data Interchange (EDI) computer to computer data transfer

• XML data transfer - sending party provides a structured data file

• Portal for web form creation or data file upload

• Email with an attached file

• File share transfer, Google Drive, Dropbox, Share Point, etc.

If you can leverage the above, you have come a long way in addressing the issue of paper documents being delivered via physical mail. The trouble is, most of the above options require the sending party to make changes. EDI and XML require an IT project to complete and maintain the transfer. A portal will require duplication of effort by the sending party and a willingness to connect to a multitude of portals.

Emails are by far the easiest method of sending and receiving files. After all, who doesn't have access to an email account these days? Files are easily attached to email too.

A file share can be useful, but how do you know if the

documents have been received and processed effectively?

What the above process has done is change the mindset of the receiving and sending parties to adopt electronic transfers, so we are starting the digital journey and beginning to solve some of your processing inefficiencies!

How to Take Advantage of RPA?

So, now you have the data - unless, of course, the files sent are images. If someone has scanned a document to create an image (pdf/tiff/png, etc.), then you don't have data, and you need to convert the image (picture) into data using Optical Character Recognition (OCR)

The challenge here is although OCR has been around since 1913 (Optophone), and was commercialized in the 1930s, OCR technology has undergone many variations and developments in the last 70 years or so. OCR is reliant on the quality of the document being scanned and the scanning quality.

We've all seen 'B's' converted to '8's' and '1's' to 'L's', among other errors. These OCR errors require powerful algorithms to try and clean up the error or to pass them over for human intervention. So, it's clear that an efficient and automated process needs to avoid paper and OCR.

We are now left with the inbound data file, which is where AI and robotics can come into its own and can start to transform and optimize your digital transformation and automate your process.

Computer programs and robotics rely on logic and data to function, an image file is simply a picture that a program can do nothing with. If you provide a program with the data from an application, invoice or patient, we can then automate that logic.

As you receive data and do not need to rely on OCR, you can't misread the characters, so gone are the days of translation errors, and we have accurate data to work with. The next questions are, why do I need the data and what do I need to do with it to complete the transaction/task?

These processing steps/rules are what an AI and robotics solution can manage and automate.

Taking an accounts payable process as an example, if we address those suppliers who issue the highest volume of invoices first, we will ensure an early and rapid reduction in manual processing. Get them to send a data pdf via email, it's so simple, and there is no cost to the sender.

The process will look something like this:

• A supplier issues an email with attachments or file transfer of a data file (pdf, MS Office Doc, other data stream).

• Receiving party collects the file from an email account or file share and because the data is already present, it deploys a program to read and extract the data, with 100% accuracy.

• Suppliers will send their layout of an invoice with critical fields in different locations and with different formats such as: Date formats; Number lengths and including a prefix or suffix; Units of measure; Delivery addresses.

Validating Data

Once the program has the data and understands what the receiving system requires, the extracted data can be validated and, where required, enriched to ensure the receiving system can automate the upload and then process the transaction.

This process may include validating the data with a purchase order (PO) and or a receipt note. This is where the interesting stuff happens.

Let's assume there is an error, the price is incorrect, or the PO cannot be found, the AI/robotics can trigger an action to automatically query the price or the validity of the PO and action the response.

If there is a logical set of business rules that can be deployed to manage a business process, this can be programmed, and the formula can be as complex as required, but where a human makes an intuitive decision, it's harder to program.

AI uses the programmed intelligence, and the robot can fetch and carry data based on the applicable logic and it's a symbiotic relationship.

But, it all must deliver the required outcome and accommodate the multitude of variances and scenarios that are found in the real world, such as 8/12/2018, now is that the 8th December 2018 or the 12th August 2018? If the sender had an address in the USA, then August would be the right answer.

AI and robotics can process your data very effectively, but any robotic process needs to receive accurate data in a format that it can read, the downstream process must be understood and supported by the AI and RPA process to deliver value and effective business outcomes.

Steve Britton is a Business Process Digitisation and Automation Solution Specialist with e-invoicing network CloudTrade.

RPA in action for Healthcare

One of Australia's largest private hospital groups has deployed Robotic Process Automation (RPA) in tandem with ABBYY FlexiCapture technology to overcome a major headache with processing over 30,000 supplier invoices per year.

The company is a leading provider of high-quality healthcare services in Australia and New Zealand with more than 15,000 staff. The solution deployed by Mindfields Australia employs RPA bots from Automation Anywhere to process a wide variety of invoice formats received from over 8,000 individual suppliers. Previously more than 40 fulltime staff were employed to manually identify invoices that arrived by email, sort them into PO and non-PO invoices then process them in to the company's Oracle financial software.

The automated process now identifies invoices as they arrive in a shared email inbox and ABBYY FlexiCapture then captures the data into Excel. The Automation Anywhere bot is then able to log into Oracle and input the PO-related line item data and perform validation. For non-PO invoices, the bot inputs the line item data and sends the invoice for authorization.

Mindfields Australia Managing Director Mohit Sharma said, "The Client processes were routine data entry with major volume spikes during specific periods. Data standardisation was one of the major roadblocks in reconciliation process."

"Mindfields automated the business process as per its RPA Development Lifecycle. The Mindfields team performed user acceptance testing (UAT) and deployed the automated process into production. The client's Finance and Product Control team was trained in BOT usage and exception handling, as a part of supporting their routine operational activities.

"The RPA solution has resulted in a 90% reduction in processing time and 100% accuracy in invoice processing."

Sharma said the successful project demonstrates how the use of ABBYY's AI-powered Intelligent Capture can extend RPA solutions to new processes involving multilingual, semi-structured or unstructured documents.

Where automation involves reading an input from a document to decide on the next step, ABBYY FlexiCapture can be invoked to assist in this step:

- A bot can call FlexiCapture's Intelligent Capture process (e.g. through an API)
- The Intelligent Capture engine processes the document and returns the results back to the bot
- The bot selects the next action based on the result

The two technologies can operate in a complimentary fashion with FlexiCapture allowing RPA to pick up its tasks without a person setting off the sequence.

The higher the recognition rate, the more feasible the RPA process becomes. For invoice projects, ABBYY FlexiCapture accuracy is around 70% using the out-of-the-box ANZ invoice add-on and this can be improved to around 90% with further configuration

"ABBYY FlexiCapture provides high accuracy rate and sophisticated data capture and manipulation," said Sharma.

"AI-enabled capture software allows robots to become more perceptive."

Henry Patishman, Sales Director – ABBYY Australasia, said, "Our ability to provide robots with specific "fast start" content intelligence "SKILLS" significantly enhances the extent of business process automation achieved by RPA and reduces the time to value (ROI). It is great to have RPA specialist partners like Mindfields that are able to bring together best of bread solutions to deliver the best outcome for customers."

For more information about Mindfields, visit www.mindfieldsglobal.com or contact: info@mindfieldsglobal.com

Contact ABBYY at sales@abbyy.com.au or on (02) 9004 7401

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RPA challenge inspires SAP/Oracle veteran

Tim Ebbeck, Senior Vice President and Managing Director in ANZ, Automation Anywhere. Tim has spent the past 30 years transforming some of the world's largest technology companies including Oracle, SAP and NBN Co in Australia. In an interview with IDM, he outlined his key priorities for Automation Anywhere in ANZ, including the opening of three new operations in Canberra, Sydney and Auckland before year-end, with plans to further expand in 2019.

IDM: Tim. You've led some major ERP vendors, Oracle and SAP in Australia, and ERP is traditionally regarded as the top of the pyramid for Enterprise software. Why the move now into Robotic Process Automation (RPA)?

TE: SAP took control of the ERP space in the 1990s and the 2000s. I see that as the first phase of automation. It was the first opportunity to implement automation to see immediate benefits and drive real business value.

While there have been stories of great success, there are equally as many stories about the challenges in implementing automation. Things have developed quite significantly since then. Whilst at SAP and also when I led Oracle, there was a significant shift to a more hybrid environment where large and important on premises solutions were supplemented and complemented by cloud solutions.

The hybrid environment that we have today is comprised of many complex systems completing a lot of work. But there remain huge gaps that require a great deal of work to be done manually by people. A lot of this work is mundane, a lot of it riddled with challenges that can be automated. This is where RPA comes in – where businesses can build artificial intelligence (AI) and deep analytic capabilities into the technology. This frees up people's time to do more creative work. When I was first approached by Automation Anywhere I did a bit of research and it struck me that they are a market leader since they are the only vendor to provide RPA, cognitive automation and built-in analytics in one platform. Australia and New Zealand is a market that is starting to take off and there is a huge amount of interest, and demand for automation capabilities.

This is what interested me in joining Automation Anywhere. It's fascinating stuff, a great time in history.

IDM: Adrian Jones, your APAC VP has said "The market in ANZ presents a unique opportunity for automation anywhere." Can you just explain a bit what you think the unique opportunity is?

TE: Well I think there are a couple of things. Australia has traditionally been a very early adopter of a number of technology and business trends. For example, this market was one of the early adopters and leaders in the outsourcing trend. Now there are opportunities as organisations look at not just onshoring but using technology more strategically to bring technologies into their business and overcome some of the deficiencies that occurred in outsourcing previously.

Secondly, the maturity of this market when it comes to cloud, not just ERP but broader systems, be it ERPs, CRMs, big banking projects and core banking systems, insurance systems, logistic systems. I can attest to the fact that back in my SAP days there were quarters where the business in ANZ was the second or third largest operation SAP had in the world. When I was at Oracle we supported large organisations on the journey of transformation from old systems to new systems. This market has significant potential to grow. At the moment Automation Anywhere has only been here for about 18 months and we've got our footprint started. Now it's time for us to accelerate.

IDM: Also, your CEO Mihir Shukla recently stated that automation has reached an inflection point, a tipping point. What do you think that is?

TE: It is not sufficient to continue looking only at the automation of tasks. Businesses need the system to add intelligence to automation technology where it can start to think like people think and analyse the way people analyse. What intrigued me about Automation Anywhere is that it actually has that capability natively built into it with our IQ Bot technology.

What organisations are looking for is not just the automation of simple tasks. They're looking at how they can free up their employees' time. Most of the tasks that cause people not to enjoy their workplace are actually the mundane, repetitive tasks. RPA can take on a lot of these tasks. There's hidden value provided aside from improved productivity; employees are happy focusing on more meaningful work. Happier people will lead to better productivity, greater innovation and stronger business results. RPA is a more scalable and flexible approach compared to traditional approaches. The ability to set up this technology quickly means you don't need two year, large, complex integration projects. I've actually built a bot myself in the space of about 10 minutes. It's very easy and simple to build. As they are flexible, you can move them around as much as you need.

IDM: Enterprise capture and workflow has been around for a long time promising to plug the gap between business systems, still many organisations still have paper based workflows. Do you think RPA is going to fill that hole?

TE: I think it does fill that gap. Base level RPA where a business is simply doing transactions and repeating them partially fills that gap. When you start adding the ability to think and learn from what's going on and you add the ability to gather insights as the process is occurring, you're talking about a very different proposition. We have developed to the next step and I think that's part of what Mihir refers to when he says that inflection point. We've now reached a point where we can do so much more with the technologies that we have today compared to what they were even 18 months ago.

Gartner Identifies the Three Biggest Areas of Finance Automation Failure

Robotic process automation (RPA) will be commonplace in finance departments by 2020, but implementations are likely to encounter failures at three key stages, according to Gartner, Inc.

"Unlike many new technologies , RPA has the potential to deliver significant business benefits on day one," said Johanna Robinson, managing vice president and head of finance research at Gartner.

"To deploy RPA successfully finance leaders must embrace a new mindset. Unless finance departments take a more agile approach when implementing RPA, they are likely to experience failures at each phase of implementation and won't realize the full potential of the technology."

RPA promises to speed up and automate routine processes while reducing the amount of errors, which in turn will enable human team members to pursue higher value tasks that cannot be easily automated. Ms. Robinson shared the three key areas of RPA implementation where failures occur most regularly.

The Planning Stage - PA deployments often fail to deliver on expectations because they are planned as an end-to-end process, rather than focused on a single activity within a process.

A focus on mapping an entire process before automating a single activity will delay implementation significantly and, in fact, create extra work. This is because, once one activity has been successfully automated, the code can be quickly applied to other similar activities within the same or different processes.

"Finance departments can start relatively conservatively with RPA by focusing on using one bot against a number of individual activities," says Ms. Robinson.

"It's still conservatively possible to see an output gain of up to 10 times, compared with a full-time employee working during the same amount of time."

In this way, organizations can reap immediate efficiency gains from RPA, without investing a lot of time planning, standardizing and implementing. Then, when gains have been realized and the pilot is working well, they can move to other similar activities and processes in an agile, iterative way.

Gartner also recommends that finance leaders focus on identifying the areas of responsibility needed to manage RPA, rather than relying on traditional, fixed roles for this purpose. Finance department leaders should account for the new competencies needed for successful RPA management, centred around digital process design. These are largely hard-to-train competencies and organizations will likely need new hiring processes to ensure the right skills for the job.

The Building Stage - In this stage, difficulties again occur when leaders treat RPA deployment the same way as they have legacy technology projects.

Traditional technology deployments have relied on a "big bang" approach, where the majority of potential use cases are mapped and tested before the project is implemented. A list of requirements is generated and vendors are asked to submit their proposals.

"You don't need to figure out every possible use case and requirement of an RPA solution before you begin," said Ms. Robinson. "This will just result in spending more time and money than is really needed."

The Testing Stage - Relying too much on IT teams and vendors to identify the issues and needs for deploying robots often causes failures in the testing stage. The organization's RPA team should take the lead in clarifying and directing support needed from IT and vendors at the appropriate times.

Gartner recommends clearly defining responsibilities for RPA activities so that the RPA/IT teams deal efficiently with issues such as setting up and monitoring robot performance, with IT providing support for the underlying technology infrastructure.

Due to the highly iterative nature of RPA technology, and the unique needs of the business it addresses, the most important aspects of managing robotics requires internal steering.

"The benefits of successful RPA deployments within finance include a reduction in errors from manual work and a redeployment of full-time employees to higher value activities," added Ms. Robinson.

"But robots are only as good as the people who design and manage them. CFOs should start any RPA deployment by ensuring they understand the new agile mindset needed to implement the technology, with the right competencies in place to manage it."

ABBYY's Innovation Chief

Anthony Macciola, Chief Innovation Officer at ABBYY sat down with IDM to discuss the transformation of the enterprise capture market.

IDM: Anthony, you have now been in the chair as Chief Innovation Officer at ABBYY for just over 12 months, what are the highlights so far?

AM: I think the biggest surprise – positive surprise – was learning how well positioned we are in the capture and Robotic Process Automation (RPA) markets, the growth we're experiencing and the level of brand recognition we have.

What I thought I was going to do when I started is completely different from what we are doing right now. With all the automation trends that are exploding, it's a whole new set of buyers, and so we're now looking at delivering our core technology to an audience that's brand new for us.

We are talking to new customers every day and they are excited to hear what we can offer. It could be a more sophisticated or less informed audience from the capture awareness standpoint, whatever their initial level of insight might be, it's a completely new set of buyers who are trying to fix their pain points and they just want it to be easy and simple.

IDM: There is a lot of hype about AI in business today. Do you think there is a proper understanding of what it is and what it can and cannot do?

AM: No, not at all. I keep joking, if you talk to 10 people you'll get 14 answers about what AI is, and none of them will be the same. AI is a set of technologies that we have but we prefer to be more precise: for us, it's all about Content Intelligence.

Our customers shouldn't have to be Natural Language Processing (NLP) experts or Machine Learning (ML) experts. They want us to help them understand their content and we should use whatever technology is needed to allow them to achieve their objective simply.

IDM: ABBYY has been researching and developing machine learning and NLP technology for many years now; where can we expect to see this being deployed over the next 12 months?

AM: The whole paradigm of FlexiCapture is based on machine learning. So, I think a focus for us going forward is to simplify the use of our technology.

Today, if you want to use FlexiCapture you do need some training. We are working to further simplify our data capture and content intelligence offering to make it as intuitive as possible.

People just want their software to work, they wonder why all those complexities still exist. How you get broader adoption today is – you make it simpler for a layman to use, so I think we're going to focus a lot of effort around that.

IDM: ABBYY recently introduced Text Analytics for Contracts, which is a cloud capture and machine learning service. Is the cloud key to how capture becomes simpler, easier and more accessible?

AM: The cloud does simplify deployment and sidesteps all the setup and configuration. But I think it's just one delivery vehicle and we should let our customers pick.

So, whether they want it on premise, in their cloud, or in our cloud – I think we just need to have our bases covered and make how you consume our technology a non-issue. So, we've got our cloud for OCR and for FlexiCapture, you pick how you want to consume the technology.

IDM: You wrote earlier this year about RPA, stating that "Demand for the more advanced cognitive use cases will grow dramatically in 2018 and will start with structured and semi-structured documents but will quickly move to include completely unstructured documents." How has that panned out?

AM: Our objective is to become the leading provider of content intelligence for RPA and it would be hard for you to think of the name of an RPA vendor that we are not in discussions with. Each is in different stages of flight, but we are looking to be their preferred provider of content intelligence services.

However, we are not walking away from the capture market either. This market is mature, but it's still growing. When you add to that the traction we are getting in the RPA market, those two things contribute in large part to our growth.

One of our focuses going forward is the digital transformation market, which slightly changes the approach to capture.

Instead of just a back office activity, it leverages capture as an end process, kind of the tip of the spear, activity. Customer on-boarding is a gigantic driver of digital transformation.

The very first thing you want to know is who you are dealing with, so you want to capture the ID or passport to identify them straight away.

That is one of the applications of capture actually driving the business process.

I think we will see more growth around that than the traditional back office. But the back office challenges are still there.

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How RPA Can Make Data Extraction and Migration Easier

By Daniel Pullen, CiGen

Is there a role for robotic process automation (RPA) in data extraction and migration? A contextual definition of data migration provided by UiPath is "the movement of data from an older legacy system to its new replacement system". The crux of the matter is that legacy systems will be switched off upon data extraction and migration. So, migration should be handled properly, because once it's switched off, there's no turning back.

This is why it is recommended to use RPA for data extraction and migration: its error-free, high precision and stability of output mitigate the legacy decommission risks. Furthermore, digital technology such as RPA shares relevant properties with data migration, such as being rule based and highly systematic. According to Data Migration Info, a commonplace approach to data migration is ETL, which holds that there are three steps inherently involved in migration: Extract, Transform and Load.

All steps require a high level of detail and planning.

The procedures, rules, and expected results for extraction, transformation, and mapping onto target structures (i.e. loading) ought to be clearly spelled out. This rules-based approach is very similar with the requirements for a functional implementation of robotic process automation. Additionally, the integrative capacity of RPA technology was the main reason why we described data management as one of its top use cases.

How RPA helps

We live in the digital era and data operations are at the core of doing business. Whenever you want to upgrade your legacy systems, for example the addition of cloud apps/services, merging unconnected databases by linking data providers, or simply consolidating your knowledge infrastructure, you come across the need to perform data migration.

This raises three kinds of challenges:

• You need to process the source data, extract what you need out of it, and map its format to the target system.

• You must introduce the data into the new system, using custom interfaces.

• Finally, you need to ensure that the migration has been successful and complete.

Since most interfaces do not have a built-in procedure for this process, you will most likely have to take matters into your own hands. Despite being routine tasks, all these are functionally and structurally complex. Consequently, they require correspondingly high financial and time investment.

RPA for data extraction and migration is a user friendly, simple and cost-efficient solution to handle such challenges of data operations. So, let us see how exactly it can assist you, and save you a lot of headaches.

As we defined above, we focus on data migration as a form of transfer between old and new, i.e. between a legacy system and a newer type of software. Software robots can ideally intermediate data transfer between systems because they can function independently of application programming interfaces (APIs).

Simplicity

Bots mimic human interaction, and they need to do so only with the front end user interface (UIs), thereby mitigating the reliance on APIs. Software robots do not require customised UIs, they can make the best of what is already there. Avoiding the need to pull

relevant data from APIs simplifies the entire migration process and promises faster and more accurate results. All you need to do is to build the automation workflow to extract data from the legacy systems. A robots' basic pattern recognition ability allows them to convert pretty much any digital text format into machine-encoded text, which can be easily edited and searched. This amounts to a substantial reduction of tedious manual data entry. Furthermore, you may instruct the robots to move formatted data into the newer system.

The flexibility of RPA technology is a goldmine, since it allows the robots to handle a large variety of data formats, and to create log files as required in a particular situation. In addition, software robots can also circulate the log files as desired, e.g., stored on a drive, sent by email, etc.

The capacity of RPA to integrate with different technologies makes it a reliable data specialist, which can thereby afford the 'luxury' of a holistic analysis of the transferred data. What does this mean in the larger scheme of things? A more competitive business that can better handle the fierce market rivalry.

Tracking

Another advantage of using robotic process automation for data extraction and migration resides in bots' capacity to track the migration process. By so doing, they are able to spot inconsistencies or low quality data and faulty datasets, and rectify the deficiencies in real time, before completing the migration. So, RPA saves a lot of audit time that would otherwise be needed in order to go through the whole dataset once again, not knowing exactly where the error lies.

Scalability is another RPA feature that contributes to performing data migration in a timely manner. And this is no small thing, since migration is most often a time critical operation. Absence of the necessary data from the system where you need it, is like attempting to build a house without having built its foundation.

The bottom line is that RPA underlies the successful use of data in the digital era. By "successful" we cover both cost and operational efficiency. More importantly, robotic process automation performs faster, more accurately and cheaper than API developed processes. The return on investment is generally high and the entire migration time is measured in days and weeks, not months.

The key takeaway for business is improved migration quality, faster implementation and activation of the new system(s), and less disruption across the organisation.

Daniel Pullen is General Manager at CiGen Australia, a UiPath Partner providing sales, services, training, and management for RPA and associated AI solutions in the APAC region.

Mixing AI and Machine Learning Into Business Processes

by Eric Bussy

Artificial intelligence has been the domain of science fiction for decades - think HAL in "2001: A Space Odyssey" - but as many people know, it's actually established well-developed and growing roots in modern-day life. Amazon's Echo, Netflix's recommendation engines, Facebook's facial recognition technology, auto-braking on cars, it's all based on the ability to analyze massive amounts of data in near realtime and mimic human behaviour based on the results.

AI and its various subsegments - like machine learning and deep learning - are also reaching deep into the enterprise, helping to automate many of the tasks that now are done manually, creating greater efficiencies, reducing errors and offering valuable new insights into the massive amounts of data being generated. In a dynamic and fast-changing market like manufacturing, systems that can learn and adapt on their own will be crucial in driving the next-generation flexible environments.

Businesses know this. According to Accenture, 85 percent of executives plan to invest in AI technologies over the next three years. In addition, the consulting firm notes that, by eliminating repetitive tasks and enabling more creative and accurate problem-solving, AI can increase productivity by 40 percent, many times without having to grow the workforce. But it's more than improving process efficiencies and reducing costs.

Systems leveraging AI and machine learning capabilities can help businesses become less reactive and more proactive, make better decisions for the future and improving the customer experience.

So how can all this help a company fine-tune its business processes?

AI-based systems essentially think in a fashion similar to humans and can help automate many of those processes, while machine learning can learn from a human by, for example, watching them correct mistakes and then being able to make those corrections on their own. A deep learning system can learn by itself and program itself.

Given all that, businesses now have the technologies that can enable significant amounts of policy and process automation — freeing up employees to handle more valuable tasks, like customer engagement. These technologies can churn through tremendous amounts of data, thousands of documents, analyze information and rapidly find patterns that can lead to better and faster decisions.

For the back office, these systems can learn how to group hundreds of thousands of invoices, understand what the data means, which customers are associated with which invoices, correct errors and process the documents.

AI-based technologies like natural language processing can read data and discern whether the document is an order or invoice, the numbers on the document, the language that's being used, the order number and any other information.

The technology also can be used for chatbots that can solve most customer issues without human intervention, freeing up customer service representatives (CSRs) to deal with the most demanding buyer needs and improving the user experience. Predictive modeling means business leaders can see real-time trends in everything from customer buying patterns to changes in the market and can make product and marketing decisions based on those insights.

This isn't science fiction. It's happening now. Business process software vendors are rapidly building out the AI capabilities in their products with engines that use machine learning and deep learning to manage and analyze structured and unstructured data and offer core functions like document and image recognition, content recognition and analytics and reporting.

These technologies are already being used in the business world in areas such as market analysis, content management, finance and accounting. It's also being leveraged in customer engagement, where Accenture says businesses are seeing faster resolution and a 30-percent increase in capacity - two factors which are driving customer satisfaction.

Once a business' executives decide to bring AI capabilities into their company, what steps do they need to take? Here are a few things to keep in mind:

•Make sure the data is clean. An AI - or machine learning-based system is only as good as the data it is using - it can't think or decide on its own. A company needs to ensure that the data from the databases and tables that is going into the system is accurate, complete, uniform, consistent and tagged correctly to order to be have confidence that the results are accurate.

•Find the low-hanging fruit where AI capabilities can make an immediate impact. Determine the processes that tend to be done manually - like billing, invoicing, procurement and expense - and use AI and machine learning solutions to automate those tasks, which will have an immediate effect on efficiencies and costs. Then move up the stack and look for ways the technologies can be leveraged to create predictive models and other tools to help drive better, more-informed decisions.

Eric Bussy is a Worldwide Corporate Marketing and Product Management Director at Esker.

•Find the right vendor for the AI-based business process project. The terms "AI" and "machine learning" are being used everywhere, the same way "cloud" and "virtualization" were in past years. The right vendors should be able to explain the how AI in their solutions can improve operations and what the benefits will be. In addition, they should also be ready to support the company in such ways as identifying problems that need solving, ensuring the company has the right data, explaining the skills that are needed and proving ROI.

•Remember that AI and machine learning algorithms are tools, not magic bullets. Companies need to work with their vendors to ensure that the technologies are being used in the best way to get the desired outcomes and that they're addressing the right use cases. Executives also have to have realistic expectations of those outcomes and to keep in mind that AI-based solutions can provide insights, patterns and recommendations from the massive amounts of data they process and analyze, but in the end the decisions must be made by humans.

AI, machine learning, deep learning, natural language processing and other such technologies can have a significant and positive impact on how business processes are run.

They help drive everything from efficiencies and cost reductions to better decision-making and customer experiences. Companies just need to make sure they are taking the right steps as they adopt the technologies to ensure the outcomes are what they're looking for.

Blue Prism launches Digital Exchange

Blue Prism has joined the party by launching its own Robotics Process Automation (RPA) "app store" - its new Digital Exchange (DX) – following similar announcements from competitors Automation Anywhere and UiPath in 2018. The company says it provides a "one-stop shop for building out, scaling and adding skills to digital workers."

Initial apps available at launch from ABBYY, Appian, Ephesoft, IBM Watson, Google and Microsoft among others provide a variety of AI, Machine Learning (ML), analytics, Optical Character Recognition (OCR) capabilities

Blue Prism claims its Digital Exchange differs from its competitors by offering simpler integration. It has simultaneously launched Blue Prism v6.4 which allows the plug-in apps to be instantly dragged and dropped into new or existing automations, providing a turnkey implementation of AI.

"Blue Prism took steps to ensure that the DX was designed in an intuitive way, allowing searches by various filters such as by skill category, technology, processes and verticals, to quickly serve up the assets that made the most sense," the company said in a statement.

https://digitalexchange.blueprism.com/dx/

Kofax Advances to Next Generation

Kofax has announced new robotic process automation (RPA) capabilities that leverage artificial intelligence (AI) and machine learning (ML). The company says it provides "out-of-the-box" functionality and a comprehensive, single-vendor, single-platform, Intelligent Automation solution.

Kofax is using the umbrella term Cognitive Document Automation (CDA) to describe its combination of AI technologies, optical character recognition (OCR), machine learning, and natural language processing (NLP) used to automate the processing of unstructured documents or images and their content.

It has also introduced Process Discovery in this release of its RPA platform, to allow organisations to identify and understand manual tasks that are performed and can be automated with RPA as well as the order in which they should be completed.

Lifecycle Management is another new feature. Organizations are deploying hundreds and even thousands of robots. Since bots interact with multiple applications, updates to software and web pages that incorporate bot-controlled processes can cause the bot to stop functioning until its code is reworked. This can cost organizations time and money.

Kofax RPA aims to alleviate this problem by providing enterprise-level robot revision control and deployment management making it easy to manage and deploy the entire robot workforce.

In tandem with this launch, Kofax RPA is now available to the market via a free 12-month trial. In addition, Kofax offers professional services implementation packages.

According to AIIM, 74 percent of organizations surveyed feel "unstructured information (documents and content) is the Achilles' heel of their RPA implementation."

"RPA allows organizations to more effectively leverage the investments they have made in enterprise systems by allowing knowledge workers to automate their own processes and spread automation to the countless smaller processes that have been beyond the reach of BPM tools," notes AIIM Chief Evangelist John Mancini.

"By making unstructured information accessible to RPA engines, organizations can greatly amplify their ROI."

SAP Acquires RPA specialist

SAP SE has acquired Contextor SAS, a European robotic process automation (RPA) firm to help accelerate the development and expansion of its SAP Leonardo Machine Learning portfolio.

Contextor's RPA technology relieves business software users from performing repetitive tasks and enables both attended and unattended RPA within and across applications. To date, Contextor's customers have deployed more than 100,000 bots automating business processes.

RPA will help to simplify user interface interactions across SAP and non-SAP applications. Contextor's RPA will be combined with SAP Cloud Platform and conversational AI technology and document processing capabilities provided by SAP Leonardo Machine Learning to deliver intelligent RPA, which SAP plans to include in key SAP solutions.

"With intelligent RPA accelerated by Contextor, businesses will be able to achieve the high automation level necessary to become intelligent enterprises," said Markus Noga, head, machine learning, SAP.

"The acquisition is a big step towards orchestrating process automation and will help SAP inject RPA capabilities into our applications, first and foremost into SAP S/4HANA."

The integration of intelligent RPA into SAP S/4HANA is expected in the first half of 2019. Other SAP applications will follow soon thereafter. With Contextor's RPA technology, SAP plans to automate half of all the business processes supported by its SAP ERP software over the next three years. Contextor, based in the Paris region, was founded in 2000 and is specialized in the research and development of RPA software to deliver clever, nimble and efficient application assistants, wizards and stand-alone bots.

Dashboard to Measure RPA Impact

A new Center of Excellence (CoE) Dashboard from Automation Anywhere provides displays all metrics for an organisation's Robotic Process Automation (RPA) projects, providing side-by-side comparisons of business data and the additional value delivered by digital workers (also known as bots). The CoE Dashboard is a native feature within Bot Insight, Automation Anywhere's embedded analytics solution.

The CoE Dashboard automatically evaluates data and activities from multiple bots and displays the incremental value they are providing the business. This enables an organisation to see ROI, immediately, while tracking business information which can be used for faster, more reliable forecasting.

With multiple departments across an organisation using automation technology, the CoE Dashboard showcases the actual results of RPA within each of them. The dashboard reports on metrics such as person hours saved, total cost savings, cost savings per bot, cost savings per process, bot success ratio, monthly bot ROI, and more. There is automatic tagging of variables built-in to the tool, so no data scientists are needed to set it up or keep it maintained.

"It is easy to get started with RPA but to truly scale you need an embedded analytics platform that can measure ROI, which is the single best metric to validate any technology and is usually the hardest to calculate," said Abhijit Kakhandiki, Senior VP, Products and Engineering at Automation Anywhere.

"With the CoE Dashboard, ROI is automatically calculated by task, process, and department, all in a single view. Customers no longer have to endure lengthy integration projects and hire technical specialists to understand and view their bot performance data. We are delivering business intelligence in the moment."

Robotic roll-outs reap results

95% of organisations that have implemented robotic process automation (RPA) say the technology has improved productivity, according to Deloitte's fourth Global Robotics Survey. In addition, 93% of those that have implemented or scaled RPA say it has improved compliance, 81% agree it has reduced cost and 77% say it has provided better management information. The research, based on responses from 530 business leaders across organisations with combined revenues of $3.5 trillion, analyses market trends and emerging practices in Robotic and Cognitive Automation.

More businesses are recognising the productivity benefits of RPA rather than simply implementing it for cost-cutting measures. Only 5% of businesses implementing RPA are just doing so to reduce costs, compared to 21% of businesses who said the same in 2017. Deloitte's research has found that two thirds (67%) of organisations have now begun implementing a strategy for RPA, an increase of 18 percentage points year-on-year.

There has been a significant uptick in support for RPA implementation among those who have implemented or scaled RPA, with 81% of business leaders in these organisations now supporting the use of robotics, up from 72% in 2017. Additionally, 68% of managers and team leaders are supportive of automation, compared to half who said the same in 2017.

Justin Watson, robotics and cognitive automation lead at Deloitte, commented: "Robots are increasingly becoming a fixture in the workplace, and the value which they bring is now being felt by the vast majority. The challenge now will be for robotics to be scaled effectively in order to truly show their worth in boosting productivity as well as reducing risk, increasing revenue and improving the experience of both customers and employees."

Despite the uptick in support, organisations are struggling to scale RPA as anticipated. Just 4% of organisations are now operating more than 50 robots, a negligible increase from 3% in 2017. Twenty-seven percent are either piloting RPA with under 10 robots or have moved into full implementation with between 10 and 50 robots.

Respondents cited process fragmentation, the wide variation of off-line and on-line tasks involved in processes set-out to be automated by robotics, as the main barrier to achieving scale (32%), followed by lack of a clear RPA vision (17%) and lack of IT readiness (17%).

Watson added: "Few organisations have been able to scale robotics quickly, with many struggling to move beyond early experiments. Workforce behaviour needs to change in order to recognise the benefits of robotics and the potential boost to productivity.

"We're now at a stage where the pace of robotic deployment has the potential to accelerate rapidly, but to fuel this, organisations must have a clear vision, strategy and approach to automation."

Ensuring the Failure of Your Knowledge Management Efforts

By Harold Strawbridge

It's common to find articles with titles like '17 Steps to A Successful Knowledge Management Initiative' or 'The Fundamentals of Knowledge Management Success'. While the success of storing and sharing knowledge is specific to your context, I'm suggesting that the following are things common to knowledge management failures.

Confuse Knowing With Doing

A knowledge management tool filled with great content is as inert as a rock. To people with a need to know, having managed content (either in a learning management system or a knowledge repository)can be passive just as a physical library is passive (What's a library without readers and borrowers?).

Focusing on the collecting and curating of knowledge is essential to failure.

Sharing knowledge is knowledge in motion. Applying what's shared is action. The goal of knowledge sharing is to shorten the time between learning and doing.

Focusing on sharing is as important as collecting and curating content. All are necessary to support "doing".

Not clearly stating that the intention of your efforts towards knowledge sharing is to support people to do their best work is a failure point.

Do Knowledge Management to Employees and Not With Employees

If the goal of sharing knowledge is to support people to do things, then another failure point is being ignorant of the needs of employees. The best way to miss their needs is to not include employees in every phase of improving knowledge sharing. Skip engaging employees and you bake in failure.

Without employees, you'll assume the answers to essential questions: What do people need to know? How do they prefer to get what they need to know?

In the current ways we share knowledge, what's working and what needs to improve? Do our processes or the way we educate people need to change?

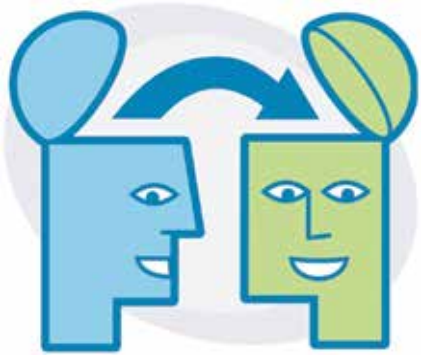
Don't Recognize How You're Already Sharing Knowledge

Ignoring how you're already sharing knowledge is an effective part of failure. Turn a blind eye to every place you store information for current and future employees (policies and procedures, processes, regulations, safety standards, work instructions, training content, job descriptions, new employee orientation, warning labels, signs, e-mail, voice mail, service descriptions, internal and external website content, etc.)

By ignoring how you currently store and share, you won't recognize what is working well and what needs improvement.

It's easy to try to create enthusiasm by telling people, "Now we're going to manage our knowledge" and miss the fact that you already manage knowledge.

Managing knowledge is really a continuous improvement effort. Also, an announcement like that discounts the efforts of everyone who is currently creating, maintaining, and using the current knowledge sharing methods.



Avoid Aligning Knowledge Sharing With Existing Job and Leadership Competencies

Don't bother to examine job descriptions. They contain your company's definition of job and leadership competencies and the behaviours that demonstrate competency. If you examine them, you might discover one of two things: that sharing knowledge is already part of your culture or knowledge sharing is not part of your culture.

If sharing knowledge is woven into competencies you have something that can help you succeed. People will recognize that a focus on improving how knowledge is shared is part of helping develop their competence. You have an existing foundation to take advantage of as you ask people what enables their sharing and using knowledge and what gets in their way. If sharing knowledge isn't aligned with competencies, you're set up for failure. Your efforts may be a "new thing" that isn't already part of your company's culture. People will wonder what's in it for them. You have a culture change on your hands with all the effort that changing a culture requires. Failing to recognize when sharing knowledge is a shift in the culture is a sure way to pour a lot of resources into a doomed effort.

Do Not Provide Recognition for Sharing Knowledge and Skip Looking For Instances of Knowledge Shared

To contribute to the failure of knowledge sharing, avoid recognizing instances where shared knowledge contributes to success. Informal recognition like, "I appreciated and used what you sent me" and "Your comment in the meeting seemed to be just what we needed to solve the problem" can only encourage people to share again. When knowledge is shared, don't send a hand written thank you note or an e-mail.

Also avoid recognizing how people have used sources to contribute to their work. In addition to skipping informal recognition, don't use the things that are available to you in your company's rewards and recognition tools.

A corollary to no recognition is not making knowledge sharing a topic of conversation in one-on-one sessions (scheduled or unscheduled).

Any one of these will contribute to a failed effort to manage knowledge. Combine them to insure a complete failure.

Harold Strawbridge is VP, Innovation and Continuous Improvement at Inglis, a Philadelphia based Disability Care Provider.

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NSW Land Registry announces blockchain trial

Chromaway AP, the Asia Pacific distributor and reseller for blockchain developer Chromaway AB, has announced it will work with New South Wales Land Registry Services (NSW LRS) to create a blockchain-based proof of concept for electronic property conveyancing (eConveyancing).

The blockchain-based proof of concept is due to be completed early next year. It is built on ChromaWay's open source consortium database technology, which has been in use since 2014 in the public and private sectors around the world. The NSW State Government is committed to transition completely to eConveyancing by 1 July 2019, and for NSW LRS to investigate new technologies that can improve the services delivered to the citizens of NSW. From 1 July 2019, all mainstream property transactions in NSW must be lodged electronically and all paper-based Certificates of Title will be cancelled.

Adam Bennett, CEO, New South Wales Land Registry Services, said, "Rapid and far-reaching technology change is impacting traditional approaches to land dealings registration and general business operations around the globe. NSW LRS is embracing this new world by conducting a series of targeted experiments with globally-recognised technology companies.

"Blockchain and distributed ledger systems are being implemented in land jurisdictions overseas where they are already delivering significant benefits. NSW LRS is therefore working with ChromaWay to investigate and test selected use cases that might be relevant to our market. By working with a well-recognised blockchain partner such as ChromaWay, NSW LRS will accelerate our learning and leverage proven approaches from implementations in Sweden, India, and other countries around the world. Obviously, any changes to NSW LRS core systems, and core and non-core services will need to be approved by the regulator/Office of the Registrar General."

ChromaWay has been developing blockchain technology since 2014. An international startup headquartered in Stockholm, and with offices in Sydney, Tel Aviv, and Washington DC, ChromaWay first gained experience with blockchain land registries when it was chosen as the technology provider for a long-term pilot organised by the Swedish land registry, Lantmäteriet.

ChromaWay leveraged this experience to build a proof of concept for a decentralised and immutable system for recording land ownership in Andhra Pradesh and is working on a range of other registry and real estate projects globally.

https://chromaway.com/

First Australian Hospitals reach top eHealth Rating

Two Australian hospitals have been officially recognised as the first hospitals to adopt the highest international standards of digital health at the Healthcare Information and Management Systems Society (HIMSS) AsiaPac18 Conference and Exhibition. St Stephen's Hospital Hervey Bay (UnitingCare) and The Royal Children's Hospital Melbourne are being accredited as Stage 7 – the most advanced stage of the HIMSS Electronic Medical Record Adoption Model (EMRAM).

St Stephen's Hospital Hervey Bay has achieved EMRAM Stage 7 for its inpatient facilities and The Royal Children's Hospital has achieved Outpatient EMRAM (O-EMRAM) Stage 7 for its outpatient clinics.

According to John Daniels, Global Vice President of HIMSS Analytics, the awards represent the first time that any hospital in Australia has reached this advanced stage of digital healthcare and could lead to significant improvements in patient care.

"Technology is a tool that, when put in the right hands, can change lives. Australia is beginning to realise a future where

integrated, more personalised care is a reality," said Mr Daniels.

"Historically, Australian doctors and nurses faced vast challenges from systems that didn't communicate with each other, lost records, and information accessibility. This is a major step towards overcoming these issues."

"These hospitals are showing Australia what digital transformation can achieve – and the outcomes it delivers for Australian patients - and we're delighted to be part of their journey."

The Royal Children's Hospital (RCH) Melbourne uses technology to support the treatment and care of all children, particularly those with complex and chronic disorders, requiring care by multiple specialties. The technology allows clinicians to have a more holistic view of the care that each patient needs and receives: any clinician can receive a real-time, single view of the entire patient journey and the interplay between disciplines.

Prior to the introduction of the EMR, clinicians needed to hand write patient information, which had a number of challenges, particular with timeliness, communication across clinical disciplines, and when patients had multiple and simultaneous clinical needs. With the new electronic medical record system, it is much easier to see every single aspect of a patient's care, from hospital operations, to outpatient services. This allows staff to provide safer care and improve outcomes.

Along with improved clinical outcomes through a more coordinated delivery of clinical record keeping, the RCH has also opened this transparency up to patients and families. A new patient portal has strengthened the partnership between clinicians and patients' families, enhancing the hospital's ability to deliver patient and family centred care.

Queensland's first digitalised hospital; St Stephen's in Hervey Bay has improved efficiencies and patient safety through the utilisation of electronic barcode scanning of blood and medication products. The new system also provides access to online data to monitor and improve care and share data with other health care providers caring for the hospital's patients.

HIMSS Analytics developed the EMR Adoption Model in 2005 as a methodology for evaluating the progress and impact of electronic medical record systems for hospitals in the HIMSS Analytics Database. The O-EMRAM was developed in 2012 as a methodology for evaluating the progress and impact of EMR systems at outpatient facilities.

These models consist of eight stages (0-7) that measure a hospital's implementation and utilisation of information technology applications. The final stage, Stage 7, represents an advanced patient record environment. The validation process to confirm a hospital has reached Stage 7 includes a site visit by an executive from HIMSS Analytics and former or current chief information officers to ensure an unbiased evaluation of the Stage 7 environments.

"Around the world, adopting electronic medical records has been shown to help healthcare organisations to save lives by using data and analytics to improve high-quality care, safety, and efficiency," Mr Daniels said.

NZ Privacy Commissioner happy with data on Australian Azure cloud

The New Zealand Office of the Privacy Commissioner (OPC) has entered into a contract with Microsoft to store all applications and data on external servers. After conducting its own Privacy Impact Assessment on the use of Microsoft cloud services, it will store the data in Microsoft's data centres in Sydney, with possible backups in Melbourne.

"We are satisfied that the privacy laws in Australia provide an equivalent level of protection to New Zealand law," it said in a statement.

"We are satisfied that Microsoft's Azure and Office 365 services will meet our needs while protecting individual privacy.

"We have evaluated the risks and believe that Microsoft offers industry-leading data security, and better data security than we can deliver ourselves. "

"This commercial arrangement will ensure that we are able to access state-of-the-art support and security at a fraction of the cost at which we could do it ourselves, or through any onshore provider. This means that our data is safer, and we have more resources to deploy for to other parts of our business. Our move to an externally hosted environment is consistent with government policy to encourage the uptake of outsourced data storage and processing."

The privacy impact assessment (PIA) explains the context for the move, the key privacy risks, and why the organisation is satisfied that it can overcome those risks.

"We have made our PIA publicly available to reassure the New Zealand public that we have made a careful and safe decision about the way we handle the personal information they entrust to us.

Law firm defends against data leaks

CFG Law, a specialist personal injury law firm based in the UK, has added Docscorp cleanDocs to prevent inadvertent email data leaks. Human error in handling email is the leading cause of data breaches worldwide, and increasingly firms are looking for a solution to protect staff from accidentally sending sensitive client data to the wrong person.

CFG Law is one of many UK firms to deploy email recipient checking technology to prevent common errors in Microsoft Outlook: emailing the wrong recipient, sending the wrong attachment, or accidentally releasing document metadata. cleanDocs is claimed to be the only product on the market to address all three risks.

Steve Taylor, Head of IT and Business Improvements at CFG Law, saw that the business needed a solution to remove any risk of leaking information outside the firm.

"Our Lawyers are aware of the sensitive nature of the emails they send, and we wanted a way to reduce the risk of sending emails to the wrong recipient. Data protection is very important to us," Steve said.

"We looked at an email delay solution, but we didn't want to slow down the end-user. So, we trialled cleanDocs and found it very easy to install, configure, and use. Now, everyone at the firm cleans document metadata on send and double checks recipients so they can be confident every email ends up in the right inbox."

cleanDocs can be used to scrub metadata and send secure emails. Upon clicking Send, users can check the recipient list for external or blacklisted email domains, Reply All and Forward actions to ensure the right information is being sent to the right person every time and that the user's actions are as intended.

Three-Way Challenge for Northen Beaches Merger

More than 80 local government authorities across NSW faced a difficult technical challenge in 2016 following the NSW state government mandate to force council amalgamations. The challenge was threefold in the case of the amalgamation of the former Manly, Warringah and Pittwater Councils into the new Northern Beaches Council.

With a local government area stretching from the Barrenjoey lighthouse at Palm Beach to the wharf for the iconic Manly ferry, Northern Beaches Council as at the 2016 Census had an estimated population of 252,878, making it the third most populous local government area in the Sydney region.

Amalgamation of the three councils required a consolidation of existing Council business systems including TechnologyOne, TRIM, Authority, Merit, Salesforce, Icon, and InfoMaster.

Northern Beaches Council settled on the following systems:

• TechnologyOne: Finance & Supply Chain, Works & Assets, and Property & Rating

• Salesforce: Community portal and Customer Relationship Management (CRM)

• TRIM/Content Manager 9: Electronic Document Management System (EDRMS)

Data was migrated into a shared system to be used by all staff requiring access to the system. Northern Beaches Council has 1,500 Content Manager licences and a current total of 1,395 active users.

Solution provider Kapish, a Citadel Group company, ran the migration of over 9 million documents into Content Manager and also provides a range of its add-ons for users: Kapish Proclaim Integrator (the TechnologyOne integration); Kapish Word Add-in and Kapish goTRIM (Content Manager app for iPhone & iPad).

Planning commenced in August 2016 and the project was delivered in July 2017.

Majority Rules

Chris Wilson, Manager Information Management for the merged Northern Beaches Council, said, "From a change management point of view, the decision was made to adopt the systems used by the most people.

"As people were accustomed to referring to Content Manager by its former name – TRIM – a decision was made to continue to refer to Content Manager as TRIM."

Before amalgamation the Business Classification Scheme (BCS) in each EDRMS was aligned to GA39, all records were then aligned to the BCS.

Record types were mapped between the three former Councils. The number of record types were kept to a minimum with new ones created to accommodate the way some records were stored in a legacy system.

Some records types had to have additional fields added for the extra metadata stored/attached to the legacy records.

The purpose of Actions/Workflows in each system were analysed and a new set developed to accommodate those workflows which TechnologyOne would not be managing.

"We had different networks so logins in TRIM had to be managed. You can have 2 logins per username, so some people had to have 2 usernames because they needed to log on from 3 different networks," said Wilson.

"The major changes for staff included a new EDRMS for some and a new configuration for others. There were also new processes to deal with and staff gained access to Kapish goTRIM for the first time, allowing access to Content Manager content via their iPhones.

"Overall people managed the change in the systems well and the major stumbling blocks were changes to processes.

Although many staff had previously used both TRIM and TechnologyOne they were configured differently, and so changes affected most people."

There were three trial migrations undertake in the months leading up to the go-live. The final migration took place over a weekend and took 2 days.

"We had allowed 3 days and were able to go-live 1 day earlier than scheduled," said Wilson.

"Kapish designed how the EDRMS would be setup and worked, as well as preparing the three data sets for import and liaising with TechnologyOne. It was a comprehensive job and well done, the new EDRMS worked with no hiccups on 'go live' day."

There were many other people involved in testing, training, communications and support at go-live.

All users were offered training in TRIM and in associated information management procedures and processes: 68 sessions were run across 8 locations with 565 people attending.

A Single Deadline

According to a Kapish spokesperson, "We were told fairly early on in the project that there couldn't be any business hours outages and that all users from the three former councils had to go live at the same time so we couldn't split the upgrade over multiple weekends. Because of these constraints and huge volumes of data to be migrated we had to develop a completely new way to do the migrations.

"In the end after much testing and refining we could get the systems fully migrated in about 8 hours. Tackling the project this way meant that there was more time spent in developing the scripts and processes up front but we were able to test the migration process end to end many times before committing to the final go live which lead to increased confidence in the project.

"The process and tools that were developed for joining the TRIM datasets together are generic enough so that now we can take any two TRIM datasets and amalgamate them in a matter of hours and then work through the reconfiguration of the amalgamated datasets on the screen live with the client rather than trying to work through multiple spreadsheets and screens to try and map the data which has revolutionised the way we can tackle amalgamation and MOG projects.

"The go live was actually split into 2 sections. The go live of some of the other systems couldn't happen on the same date as the EDRMS amalgamation and a decision was made not to defer this until the end of the year which added some additional challenges.

"The amalgamated TRIM system went live on 1 July 2017 but we actually developed and ran integrations with the 3 different land information systems until December 2017 where a second process was run to join the data together and link them to the new amalgamated TechOne Property & Rating system as it went live. The actual P&R amalgamation took place over business hours so documents registered during this period were re-linked to the related items once the P&R system was re-established.

"At this time we also rolled out an updated integration with TRIM and TechOne P&R to make linking documents during the registration process easier which has been extremely popular.

"The overall amalgamation project had a huge amount of moving parts which covered many different systems outside of the EDMS and it was great to work so closely with such a dedicated group of people from the newly formed Northern Beaches Council and external contractors and vendors and learn about these different systems to help run the business of Council," said the Kapish spokesperson.

Northern Beaches Council CIO Nathan Rogers said, "We really appreciated the dedication and individual approach that Kapish undertook to achieve something that hadn't been done before.

Once the amalgamation was completed we tested by running an inquiry common to all three former councils and it was very satisfying to key in a search and see it bring back records from all three in the one pane of glass."

In addition to managing the challenges of amalgamation, Northern Beaches Council has been pursuing its own digital transformation. Its daily operations are now fully digital, where any document that is born digital, remains digital and any documents received in paper format are scanned and stored electronically.

Workflow varies according to who /which business unit receives it and the primary tool used for scanning is EzeScan.

Many documents arrive via online forms which are automatically registered in CM, meanwhile paper documents are scanned and OCRd. OCR is a requirement on all scanning projects. Anything converted to PDF for uploading for public access are OCRd as part of the conversion process.

Using EzeScan for handling all incoming correspondence gives Information Management a structured process to ensure incoming records and catalogued and actioned correctly.

Council staff use on-premise Outlook or Office365 for email and have the option to semi-automate filing emails into the EDRMS.

Northern Beaches Council has been underway with a back-scanning project for all DA and property related documents, as these are by far the most requested by the public and businesses.

The scanning is handled by Jigsaw, as a social enterprise of Fighting Chance, and a registered NDIS Service Provider located in Frenchs Forest.

Jigsaw Outsourcing provides employment to people with disability, paid at Award wage. Their business harnesses the skills of a diverse and unique workforce to deliver digitisation services to corporate and government clients.

Transmittals Workflow: Updating an Old Fashioned Process

By Scott Brandt, eQuorum

Services organizations have been using transmittal workflows for years. The process consists of collecting multiple documents - some contractual, some operational and some informational - and attaching a summary cover sheet to create a deliverable package. This package, which can be delivered either by courier, mail or fax, today is mostly sent by email.

The cover sheet frequently includes a description and listing of all the items contained in the package, the versions and dates of the documents, and often some instructions.

Confirmation or acknowledgment letters are often included so senders have documentation that the package was received and the documents were approved/rejected by the recipients.

This was a great way to organize drawings and specifications being sent to customers, contractors and vendors.

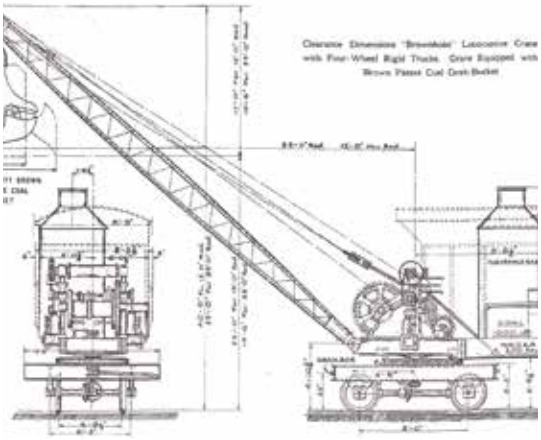
It also memorialised and tracked which files and versions had been sent. This assisted in ensuring changes were being made to the latest documents while also serving as a historical record, should disagreements or litigation erupt.

Sending transmittal packages by email has made it easier to distribute not only the files, but to track the dates of transmission and have a record of who the files were sent to and when they were received.

Automating transmittals

System automation for creating, distributing and tracking transmittals are now available for organizations.

This includes the creation of the transmittal (i.e., who is to receive the package, when it is to be sent, what files are to be included, and typically some confirmation or acknowledgment requirement). This automation has saved thousands of hours of manual transmittal package generation as well as improving the accuracy of such packages.



Some systems can control the creation and distribution of transmittals based on key criteria such as:

- The status of each of the incorporated files
- The status of the project
- Internal approvals established by managers/supervisors.

By controlling the workflow with these types of criteria the organization can better govern when and how transmittals are executed.

This means fewer packages are released before they are ready, packages are not released without adequate review and approval, and transmittals are sent only when key project milestones are hit.

Transmittals as a separate workflow

The current issue that provides further opportunity for many companies is that the transmittal workflow is independent of the other organizational workflows, instead of being integrated with drawing design and release, submittals, RFI tracking, markups (redlining) and others.

The creation and distribution of a "transmittal package" should be viewed as just another step in a larger project completion workflow and initiated, tracked and reported on within the context of the bigger process.

For example, a project workflow to create a drawing for a facilities renovation should include the original RFI, the response and approval, changes to any drawings, and the acknowledgment that the RFI is closed.

These automated handoffs ensure nothing falls through the cracks and sufficient notification is sent to the various parties as milestones are approaching, or if actions are overdue.

By including the transmittal workflow in the larger project workflow, actions, requests, notifications and collaborations can be initiated automatically instead of being tracked and reported on manually, which is typically how it is done today.

Project status as the governor

Integration of transmittal workflows is best done using a project or workflow status. Each project should be governed by at least one status attribute, if not several. This can include status such as RFI received, RFI approved, drawing(s) assigned, drawings approved, etc.

As the project transitions through each status, an automated transmittal package can be created or updated and distributed, if applicable. This way interim transmittals can also be developed, increasing the speed of the overall project workflow.

By automating the process through the transmittal package development and distribution phase, the organization also gains better insight into the reasons why projects fall behind, miss milestones, or are just not satisfying the customer (often the project owner). Reports correlating project status to the number of events and timing of events clearly indicate critical path items for companies to focus on improving.

The transmittal package then becomes a key event within the bigger engineering/construction project, not just an independent offshoot that is being accomplished at the pace of the document control or project management group.

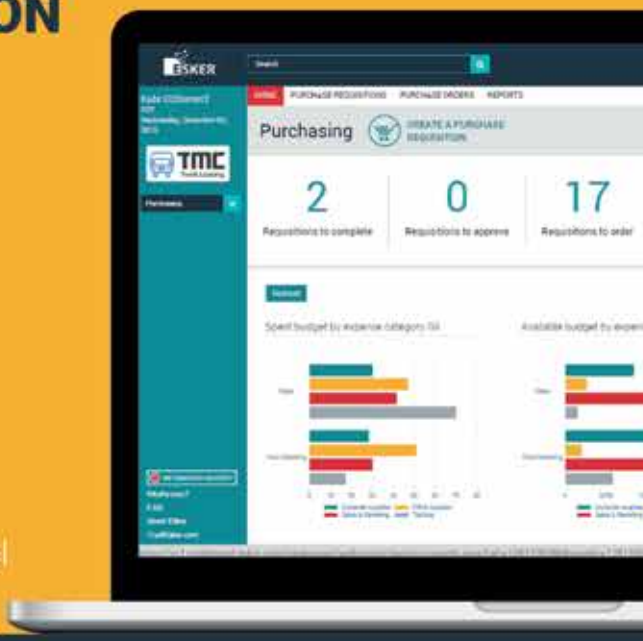
Transmittals: integral to project workflow

Organizations benefit from the audit trail created by automating transmittals, but at the same time should not overlook the true purpose of the workflow — to expedite and progress the overall project workflow. As long as the company policies, procedures and systems disintegrate the transmittal workflow from the other project workflows, the real advantages won't be realized.

In the future, workflow management systems will improve and better recognize the project management and transmittal correlation, and perhaps even get the related parties to collaborate more in real time. Until then, the development and distribution of transmittal packages should be a key step in the overall project — one that is integral, not independent.

Scott Brandt is president and CEO of eQuorum, a developer of Engineering Document Management Software.

PURCHASE-TO-PAY AUTOMATION



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ORDER-TO-CASH AUTOMATION

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Bringing order to document chaos

By Kris Elliott, Upflow Solutions

It's no secret that organisations are shifting away from paper-based records and by all accounts the amount of electronic documentation being created and retained is growing. Where once documents were printed only to be boxed in an archiving carton and shipped off to storage, now you have documents being saved into any spare MB of space a user can find where they can quickly find their document again.

The problem is that as the volume of documents an organisation handles continues to grow, the rules around how those documents get managed have not necessarily evolved with the changing trends, if in fact there were any rules to begin with. What many organisations are left with is collections of documents, often siloed within various departments or workgroups, that the organisation itself has no over-arching visibility of nor access to.

There is a name for these kinds of files and it is 'Unstructured Data'. Unstructured data is essentially any data that sits outside of a governing system or database. Typically, this is file-based information.

It's the PDF's sitting on your Desktop. It's the collection of photos that got thrown into a sub-directory on the company Shared Drive. It's draft documents that got used in the creation of a final report. It's the receipts that go with the expense claim. It's the delivery docket on the warehouse managers desk, and it's even the leave application form that you filled out last month.

All these document types often fall through the cracks of a finance system, a customer database, an inventory management system or other ERP.

It's called 'unstructured data', creatively enough, because there is no structure to it. There is no enforced filing system, no naming conventions, no format requirements, no easy searchability, often no disaster recovery, and certainly no transparency.

People can pretty much call things whatever they like and save them wherever they please.

If you are reading this at work, pause for a moment and open the shared drives/folders on your network. You know the ones I mean. It's the M or S drive, the client folders, and the invoices directory. It's the generic 'Scanned Documents' folder that everyone uses and that group email inbox the whole team can access.

Now have a look at exactly what's in there and how its filed. In many cases it's going to start nicely. You'll have a set of appropriately named folders at the first tier, but as your drill deeper into the filing structure you'll likely see that whatever structure you thought you saw was illusionary.

Different staff have named things in different ways over the years and there will be documents in places they ought not to be. There are probably even pockets of documents that you have no idea what they are until you open them.

Imagine trying to find one specific document that someone else saved a year ago. How easy would that be? Now imagine every person in your office must do that same task dozens of times each day.

There is no denying that unstructured data is a business risk. What happens when a customer nearing the end of their agreement challenges the delivery of something in the original proposal, but the Account Manager saved it locally in their My Documents folder and left the company 18 months ago?

What happens when the photos from the last inspection are needed but they are somewhere amongst 10,000 other photos on the server with an unhelpful file name like IMG12345? What happens when a mobile team member has their laptop stolen and all their files were stored locally on their desktop?

Hopefully you are now starting to appreciate the scale of the problem and have also realised that the longer you leave this problem the more significant it will become.

So the question every business leader must now ask is, "How do I mitigate that risk in my business?". The answer is deceptively simple and it is this: YOU don't. This is not a problem you should try to solve alone and nor is it one that has a solution you can force on the business.

You need to get your staff on board and make them part of the journey. They need to be involved so that when change happens, it's change that's embraced rather than avoided. You may see the big picture of why change is needed, but your team knows what frustrates them and where all the 'surely there is a better way of doing this' pieces of the puzzle are.

The next step is to engage vendors who are subject matter experts, who can give you the advice you need. Listen to that advice and then choose a solutions partner who understands and shares your vision.

The vendor you want is not necessarily the one with the cheapest offering, nor is it the one that has the perfect 'off the shelf' product for your problem. The vendor you choose to partner with should be the one that strives not only to understand the 'What' of your project, but also the 'Why'. They will be the vendor who makes your challenges their challenges and approaches them with equal measures of empathy and expertise.

Document Management doesn't have to be hard. We deliver solutions to these types of challenges every day and we are happy to answer your questions and provide you with all the help and advice you need to help you on this journey. The only foolish question is the one you never ask.

The end result is worth the journey, but you need to contact us today.

Kris Elliott is a Solution Sales Executive with UpFlow Solutions. Email him at kris.elliott@upflowsolutions.co.nz

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Work smart

Why RPA + Case Management is Double Plus Good

By Mark Grimes

Is Robotic Process Automation (RPA) more than just a tool to mimic the actions and keystrokes of people executing manual processes? According to a recent Forbes report its actually a "Gateway Drug" to AI and Digital Transformation. Is the Forbes headline overselling the benefits of RPA? In our experience its absolutely certain that RPA technology can rapidly fill holes that current systems leave or are too costly to address. It's also is fast and agile to deploy.

However, while RPA as a technology is indeed useful and helps drive rapid change, an important factor that many businesses omit to consider is how it fits into their wider application context. RPA reveals its full capabilities to power Digital Transformation when it becomes integrated with a broader Case Management platform, i.e. when task automation is connected with business processes, workflows and rules.

RPA software is a non-intrusive technology that does not require integration like other technologies (e.g. ERP systems and BPM). It manages this by using systems' presentation layers, or the screens and reports presented to users, to access them and complete work.

Every business process invariably involves repetitive tasks. This is no different and potentially more so for customer-facing processes. Within a Case Management solution there are still tasks that potentially need to be done outside of the Case Management framework itself. For example, collecting information from your ERP, CRM, third party web-based application or other legacy system.

In a non-robotic automation scenario these are typically done by the knowledge worker either copying or pasting information, rekeying or downloading it to then append as part of the overall process. These repetitive tasks lead to lower productivity, fatigue, increased human error and ultimately higher cost of processing. In addition, these components are unaudited as they happen outside of the core processes in your Case Management solution.

These repetitive tasks are where RPA excels, enhancing your knowledge workers' experience and also allowing you to maintain auditability whilst a process is happening outside of your Case Management solution. You also get greater predictability and an audit trail of each component within the Case Management process.

Implementing RPA in your business can provide long term benefits specifically with regard to decreasing cost and increasing productivity. However as with any enterprise software decision, it is important to build a vision for RPA across your organisation.

There are 7 key elements which will set you up for RPA success across both front and back office processes.

1 Work with the business and IT to define a roadmap for what RPA means to your specific organisation. This roadmap should determine when in your business you think RPA will provide benefit to both internal and external customer outcomes.

2 In order to prove the value of RPA look for the most effective place to implement and gain a return on your investment. For example, your HR onboarding process may be extensively relying on swivel chair integration which inhibits the ability to the business to attract the best talent. This may be a good starting point.

PwC estimates that 45% of work activities can be automated, and this automation would save $US2 trillion in global workforce costs.

3 IT and the business should work closely together to ensure that the outcomes which are desired are synchronous. The technologists may consider incorporating RPA to a specific part of the process adds value but the business sees it differently.

4 Partner with Blumark to deliver your initial RPA program whilst at the same time upskilling your internal capability to deliver future bots into your organisation.

5 Take time to calculate the return on investment for your initial RPA enabled processes and use your data to inform the business case. Having your own benchmark helps to prove the value of RPA in your business.

6 Communicating your roadmap to the entire business is critical if you are to succeed with deploying RPA. In the financial services and mutual sector RPA can improve your customer outcomes whether internal or external.

7 Build a framework to bed down how your organisation will deploy and operationalise existing and new robots into your business. Determining how this works will enable you to achieve faster outcomes from identification of RPA enabled opportunities through to deployment

Blumark has built a number of solutions that combine these technologies to solve specific business problems. Learn how a combination of Case Management and RPA can deliver significant value to your business by exploring our solutions powered by these technologies.

Mark Grimes is Managing Director of Blumark. Contact him at Mark.Grimes@blumark.com.au or Tel (07) 3010 9515.

The 3 Biggest Challenges In Today's E-Discovery Efforts

In the legal profession, the discovery process can be time-consuming and cumbersome – lawyers and law clerks have to sift through mounds of paper-work, searching for information that is relevant to their case or their clients. Electronic data discovery (e-discovery) hasn't made this any easier as an even larger volume of electronically stored information (ESI) has entered the process.

As more documents are converted electronically, e-discovery should become conceivably more efficient as paperwork is reduced and discovery work is made easier. However, there is still a lot of paper involved in the discovery process.

Also, lawyers have been slow to develop e-discovery competencies. Additionally, a lack of co-operation between parties in a lawsuit can create obstacles in the discovery process that technology isn't likely to fix. Cross-jurisdictional cases also pose an e-discovery challenge because not every jurisdiction follows the same rules and regulations; in some cases, it may be difficult or impossible to obtain the proper documents. What's more, all that paper isn't integrated into the electronic document flow, depriving law firms of one of the most significant benefits of e-discovery: the ability to use data analytics or search terms to speed up the process.

Paper documents that aren't part of e-discovery processes are challenging to integrate into the electronic document flow. Therefore, these unrecorded documents reduce the potential value of data mining and analysis tools that law firms are increasingly using to evaluate documents during discovery.

Software tools like this help expedite the process of searching through mounds of records for information.

Electronic document management can help by integrating these document streams and improving the discovery process by addressing these common challenges:

• **Increasing Volumes, Wider Variety of Documents:** Electronic documents have vastly increased the volume of information that has to be analyzed during e-discovery. The stream of paper documents is also tricky to manage and effectively scan because of the wide variety of document types and sizes. Using an enterprise-class scanner like an OPEX FalconV, users can automatically sort and scan any size document and speed up this process. Those documents can also be analyzed, classified, and assigned metadata during the imaging process, which makes it easier to combine both electronic and physical documents in a way that makes them infinitely more searchable.

• **Security and Organization of Documents:** With digital imaging, law firms can combine both physical and electronic sources during e-discovery. Scanned documents are also more secure using rule-based access security that can be set up for the files. Scanning also eliminates concerns about physical documents being lost, damaged, stolen, or otherwise compromised.

• **Labour, Cost, Accuracy:** Combining e-discovery and document imaging can allow firms to reduce the amount of data they need on hand earlier in the litigation cycle, which improves efficiency and lowers overhead costs. Non-relevant data can be sorted and discarded with less labor, and no need to store large amounts of physical documents on or off-site.

According to some sources, seven out of every 10 cents of document production costs are consumed in the review phase; electronic documents can significantly reduce that burden.

E-discovery and document management solutions can also do so with a higher degree of accuracy than manual searches.

With lower costs and higher efficiency and accuracy, law firms are better positioned in what is an increasingly competitive market for legal services.

While e-discovery can be challenging for law firms, the use of document imaging and analytics can help streamline discovery and document management, and result in a more efficient and accurate process.

Learn more at https://www.opex.com/document-scanning/document-scanners

Hope and fear surround emerging technologies, but all of us must contribute to stronger governance

By Nicholas Davis and Aleksandar Subic, Swinburne University of Technology

It's been a big year for companies pushing the boundaries of technology – and not in a good way. The Cambridge Analytica scandal led to a public outcry about privacy, the Commonwealth Bank's loss of customer data raised concerns about cybersecurity, and a fatal self-driving car crash put the safety of automated systems in the spotlight.

These controversies are just the latest warning signs that we urgently need better governance of the technologies redefining the world. There is a widening gap in knowledge between those creating and using emerging technologies and those we charge with regulating them. Governance cannot be left just to the public sector – it is a job for all citizens.

Until now, we've been sleepwalking through the early stages of the Fourth Industrial Revolution . We dream of a future where artificial intelligence, synthetic biology, distributed ledgers and neurotechnologies magically make life better for all.

As we begin to wake up, it's becoming clear the world has already changed around us in profound ways. We're realising that creating and commercialising powerful new technologies is the easy part – the hard bit is making sure these new capabilities give us what we need and want, rather than what we imagine and fear.

Building the technology we want

What we want is to realise the benefits of revolutionary new digital technologies to the economy, our quality of life and a more sustainable world.

Analysis by consultancy AlphaBeta suggests that automation could add A$2.2 trillion to cumulative Australian GDP between 2017 and 2030. In healthcare, diagnostic approaches and treatments targeted to individuals could be as dramatic a change in our ability to prevent and treat illness as was the introduction of sanitation and antibiotics.

More generally, advances in machine learning are demonstrating that algorithms can simultaneously benefit companies, shareholders, citizens and the environment.

We may be amazed at the prowess of computers beating the world's best Go players , but perhaps more impressive is that Google DeepMind's AI managed to reduce Google's Data Centre energy use by 15% . That's a recurring benefit amounting to hundreds of millions of dollars. DeepMind subsequently launched discussions with the UK's National Grid to try and save 10% of the UK's energy bill.

What we fear is that history will rhyme, and not in a good way.

The social and environmental damage resulting from previous industrial revolutions taught us that new technologies don't inevitably lead to better outcomes for everyone. For a start, the benefits are often unevenly distributed – witness the one billion people around the world who still lack access to electricity . And when we do discover that harm is occurring, there's often a significant lag before the law catches up.

What it means to be awake

Most fundamentally, being awake means recognising that the same exciting systems that promise openness and deliver convenience come with significant costs that are affecting citizens right now. And many of those costs are being borne by those least able to afford them – communities with less access to wealth or power, and those already marginalised .

These costs go well beyond risks to our privacy.

When an algorithm fails to predict the next word you want to type, that's generally not a big deal. But when an algorithm – intelligent or otherwise – uses a flawed model to decide whether you are eligible for government benefits , whether you should get bail or whether you should be allowed to board a flight , we're talking about potential violations of human rights and procedural fairness.

And that's without getting into the challenge of harassment within virtual reality , the human security risks posed by satellite imagery that refreshes every day, and the ways in which technologies that literally read our minds can be used to manipulate us .

The government alone can't fix this

It's tempting to say that this isn't yet a big problem. Or that if it is a problem, it must be up to the government to find a solution.

Unfortunately, our traditional, government-led ways of governing technologies are far from fit for purpose. Many emerging technologies, such as novel applications of machine learning, cryptocurrencies and promising biotechnologies are being developed – and often commercialised – at breakneck speed that far exceeds legislative or regulatory cycles. As a result, public governance is continually out of date.

Meanwhile, the novelty and complexity of emerging technologies is widening the knowledge and skills gap between public and private sectors.

Even communication is getting harder. As former US Secretary of State Madeleine K. Albright put it :

Citizens are speaking to their governments using 21st century technologies, governments are listening on 20th century technology and providing 19th century solutions.

Our governance solutions are out of step with today's powerful technologies. This is not the fault of government – it's a design flaw affecting every country around the world. But given the flaw exists, we should not be surprised that things are not going as well as we'd like.

How do we get out of this pickle?

Here are three suggestions.

1. Take an active role in shaping future directions

We need to shift our mindset from being passive observers to active participants.

The downside of talking about how powerful and transformational new technologies are is that we forget that human beings are designing, commercialising, marketing, buying and using this technology.

Adopting a "wait and see" approach would be a mistake. Instead, we must recognise that Australian institutions and organisations have the power to shape this revolution in a direction we want.

This approach means focusing on leading – rather than adapting to – a changing technological environment in partnership with the business community. One example is the Swinburne Factory of the Future , which gives Victorian businesses exposure to the latest technologies and processes in a non-competitive, supportive environment. It also offers ways of assessing the likely impact of technology on individual companies, as well as entire sectors.

2. Build a bridge between public and private sectors

We need to embrace any and all opportunities for collaboration across the public and private sectors on the issue of new governance models. Technology leaders are starting to demand this. At the World Economic Forum's Annual Meeting in January 2018, Uber's Dara Khosrowshahi said, "My ask of regulators would be to be harder in their ask of accountability. "

At the same meeting, Marc Benioff, CEO of SalesForce, called for more active public sector guidance, saying: "That is the point of regulators and government – to come in and point true north."

To have real impact, cross-sector collaboration should be structured to lead to new Australian partnerships and institutions that can help spread benefits, manage costs and ensure the technology revolution is centred on people.

In 2017, the World Economic Forum launched its Center for the Fourth Industrial Revolution in San Francisco. It works directly with multinationals, startups, civil society and a range of governments to pilot new governance models around AI, drones, autonomous vehicles, precision medicine, distributed ledgers and much more.

The Australian government and business community can and should benefit from this work.

Cross-sector collaboration means much more than simply getting stakeholders in a room. Recent work by the PETRAS Internet of Things Research Hub – a consortium of nine leading UK universities – found that most international discussions on cybersecurity have made no progress relevant to IoT in recent years. A primary reason for this is that the technical experts and the policymakers find it difficult to interact – they essentially speak different languages.

The same challenge has been facing the international community working on the governance of lethal autonomous weapons systems. Anja Kaspersen, the UN's Deputy Secretary General of the Conference on Disarmament, noted recently that , when it comes to discussing how the use of lethal robots might be controlled, her most valuable role is to be a translator across disciplines, countries and sectors.

By taking this approach at the April 2018 meeting of the Group of Government Experts , Kaspersen and Ambassador Amandeep Singh Gill made substantial progress in aligning expert views and driving convergence on issues, such as the primacy of international humanitarian law.

The desired outcome is not just new rules, but inclusive governance structures that are appropriately adapted to the fast-changing nature of new technologies. While reaching out across geographic and sector boundaries takes considerable time and energy, it is worth the effort as it often leads to unexpected benefits for society.

For example, The Prime Minister's Industry 4.0 Taskforce was inspired by Germany to encourage collaboration between government and the labour movement on issues facing industry and workers. As a result, the cross-sector Industry 4.0 Testlabs and the Future of Work and Education workstream is co-chaired by Swinburne's Aleksandar Subic and the National President of the Australian Manufacturing Workers Union, Andrew Dettmar.

3. Tackle the moral component of emerging technologies

Third, we need to appreciate that these issues cannot be solved by simply designing better algorithms, creating better incentives or by investing in education and training, as important as all those aspects are.

Technologies are not neutral . They are shaped by our assumptions about the world, by our biases and human frailties. And the more powerful a technology is, the greater our responsibility to make sure it is consciously designed and deployed in ways that uphold our values.

The Centrelink robo-debt controversy demonstrated what happens when algorithms prioritise the value of efficiency over the value of protecting people – and how this can backfire.

Unfortunately, the ethical and moral aspects of technology are often (and incorrectly) viewed as falling into one of two categories. Either as soft, imprecise and inessential issues interesting only to lefty activists: a distraction in the boardroom. Or as technical, regulatory, compliance-related challenges, discussed in the boardroom only when a crisis has occurred.

A far more useful framing of ethics in technology is as a set of practical, accessible and essential tools that can help organisations create sustainable value. A forthcoming white paper from the World Economic Forum on Values, Ethics and Innovation argues that leaders can and should make ethics a priority when inventing, investing in, developing, deploying and marketing new ideas and systems.

A critical task here is building ethical considerations into the very early stages of creating new technologies. Commercial AI teams are beginning to do this.

One example is the recent formation of Microsoft's AI and Ethics in Engineering and Research (AETHER) Committee , announced in March this year. It brings together senior executives to develop internal policies around responsible innovation in AI, with the AI research team reporting through members of the committee.

The next step is leading together

Governing emerging technologies is as much a moral and political task as a technocratic challenge. All Australians need to be involved in discussing what we want from technology, and helping to design the institutions that can help us avoid costs we're not willing to bear as a society.

In practice, this means more frequent and more diverse conversations about the impact of today's and tomorrow's technology. It means more innovative forms of public debate. And it means that the most influential institutions in this space – particularly Australian governments, technology firms and national champions – need to listen and experiment with the goal of social, as well as economic and technological, progress in mind.

We're starting to wake up. Now the real work begins.

Nicholas Davis is Adjunct Professor and Aleksandar Subic is Deputy Vice-Chancellor (Research and Development), Swinburne University of Technology. This article was originally published on The Conversation http://theconversation.com

How To Fight Digital Transformation Fatigue

By Kasey Panetta, Gartner, Inc.

Transform. Transform. Transform. The steady cadence of the message to focus on digital transformation is important, but the reality is that it runs the risk of creating transformation fatigue.

"Here's the thing about your transform journey - your people are feeling transformation fatigue," said Mary Mesaglio, Distinguished VP Analyst, at Gartner Symposium/ITxpo 2018.

"They can't handle any more change coming at them, or at least they think they can't."

Mesaglio shared that most of her calls with clients start with this sentence: "Mary, we are undergoing a digital transformation."

Her response? Great, what are you transforming into?

"When you get lost in the complexities of all the discrete things you're doing…it's amazing how you can lose sight of why we are doing all of this," she said.

"People are feeling fatigued because there is too much going on that they don't understand."

Take the test

First, Mesaglio encouraged teams and enterprises to take the following quick transformation test to ensure the group has a solid transformation destination .

Can you tell me:

- What is your enterprise is transforming into, and why?
- In under two minutes?
- Using no "corporate speak?"
- In a way that someone at the frontline would understand and be motivated by?

Would your peers say roughly the same thing you have?

Even for companies with a clear transformation destination, finding a way to get people moving in that direction can be challenging.

The assumption is often that to move toward transformation, the solution has to be large and overarching. In reality, CIOs can opt for smaller, changes, which can be enacted immediately and also have an outsized impact.

Hacks, nudges and prods

Culture is the biggest challenge in digital transformation . CIOs want a culture that is agile, open, creative and customer-centric. Take a three-pronged approach:

- Hack: Exploit a single point where the culture is vulnerable to change
- Nudge: Make it easier for people to behave in ways that are good for them
- Prod: Use incentives and rules to change behaviours.

The question is, how do you keep this sustainable?

Hack

When South Africa was having a water shortage, the government had pop stars sing songs that were two minutes long. The intent was to turn on the song when you start showering, and turn the water off when the song ends. The end result is a quick culture hack to reduce water usage.

Hack: Exploit a single point where the culture is vulnerable to change

Culture hacks are emotional, immediate, visible and low effort - but not low courage.

Cultures are vulnerable to change where associates spend most of their time, which is processes, projects and meetings.

Meetings, where people spend so much of their time, are particularly ripe for hacking.

Nudge

Imagine you're moving into new offices and have to choose between a formal office with mahogany desks, high plaster ceilings and closed doors or an open floor plan with no doors and a couch in the middle.

Either way, you're nudging people toward something. Whether it's more or less collaboration, accidental meetings, noise or formal behaviour, nudging is a gentle form of hacking that makes it easier for people to make the right choice. These choices push people to one behaviour and away from another.

CIOs nudge in three primary ways: Design, default and data. The way your team designs websites, security parameters and predictive analytics nudges employees to act in particular ways.

Prod

The challenge is finding ways to motivate people to behave the way you want them to. Prodding uses incentives and rules to change culture.

CIOs can tap into social norms - the world of relationships, based on social benefit - and use items like recognition, travel, or access to things or people as a way to prod. You can also use the cost of inaction or peer pressure as a prodding mechanism.

The other way of prodding is to create small rules, such as "All staff meetings will now be 15-minute standups" or "You must work with someone outside your team for this type of project." This approach enables self-sustaining and habitual change.

At the end of the day, whether they hack, nudge, prod or all three, CIOs shouldn't overlook the smaller actions that can have a big impact on getting people moving toward transformation and away from fatigue.

EDI learns a new language

GS1 has announced the inclusion of Universal Business Language (UBL) in its EDI standard syntax portfolio that already includes EDIFACT/EANCOM, GS1 XML and GS1 UN/CEFACT XML syntaxes.

As part of the new EDI strategy, GS1 will undertake a major harmonisation initiative to provide a single content description for transactional data. This approach will apply to all existing EDI syntaxes, new API syntaxes and future technologies used to exchange transactional data.

GS1 says UBL will provide an entry point into eCommerce for small and medium size businesses and could also be used for cross sector transactions including business-to-government eInvoicing or business-to-business transactions between two trading partners from different private sectors.

The Government progressing eInvoicing joint media release issued by The Hon Kelly O'Dwyer MP, Minister for Revenue and Financial Services with The Hon Michael Keenan MP, Minister for Human Services and Minister Assisting the Prime Minister for Digital Transformation, and The Hon Craig Laundy MP, Minister for Small and Family Business, Workplace and Deregulation released on the 31 March 2018, announced that the Government will commence work to progressively adopt eInvoicing across all levels of government to improve processes and help businesses.

GS1 Australia's Executive Director and Chief Executive Officer, Maria Palazzolo said, "We welcome the decision by the Australian government to adopt eInvoicing for the benefit of the business community and our members. The addition of UBL to the GS1 EDI standard syntax portfolio provides further support for the government's eInvoicing program which will simplify doing business with government and industry."

The government's eInvoicing program is based on the framework developed by the Digital Business Council and the recently established Trans-Tasman working group made up of representatives from the Australian Taxation Office, Department of Industry, Innovation and Science, Department of Jobs and Small Business, Digital Transformation Agency, Treasury, and the New Zealand Government.

The Trans-Tasman working group was established to support industry to standardise eInvoicing processes in Australia and New Zealand, and align with opportunities presented from the digital transformation of our economy.

The addition of UBL will not impact existing B2B EDI standards. EDI user communities that have used EDI for years can continue to use the UN/EDIFACT syntax that GS1 will continue to fully support.

"The new EDI strategy represents a major shift to the development of business-driven standards away from technology driven standards. This new direction will improve operational processes for users of current technologies and lay the foundation for adopting seamless modern technologies such as UBL and APIs," added Ms Palazzolo.

A flexible approach to unstructured data

By Daniel Mitchell, Hivemind

"Data is transforming business!" is a common eureka-esque cry in the anglophone media, as if it's a new thing. I mean, tell the people of the Neolithic Near East something they don't already know. Advances in information abstraction, representation, storage, processing and transmission have been transforming industries and whole economies for centuries.

Of course, the irony of that platitude is that it's also true. Data science is booming: its impact is felt throughout our business and personal lives, and companies are thoroughly aware of the valuable insights that can be gained from systematically analysing data, not to mention the potential dangers of not doing so. "CEOs: Model or Die", as Bryan Schreier, a partner at Sequoia Capital, wrote in Forbes in July.

Luckily for the CEOs wondering which of modelling or dying would be more enjoyable, it is becoming easier and cheaper to work with data without the need to create intricate clay tokens or access a powerful mainframe.

From tiny start-ups to massive multinationals, companies now can get high-quality tools at affordable prices to: ingest, store, manipulate, analyse, or visualize data; to use data to power statistical inference or train and feed machine learning methods; and to route the results of data analytics to their clients or users wherever they are in the world, in near real-time, for those end-users in turn to ingest, store, manipulate and analyse it as they see fit.

There is one annoying limitation, however. For data to flow freely from this pipeline of tools and analysis into valuable models, visualisations and automated reports, it must be structured.

Search Enabling

It needs to be standardized, organized and computationally searchable. On the face of it, that sounds achievable. After all, there's enough structured data about—petabyte after petabyte is constantly flowing from banks and cars, credit cards and mobile phones, power grids, websites and electric toothbrushes.

But data is not all equal. If you're working at Philips on a new addition to the Sonicare range then structured electric toothbrush data is hugely valuable; if you're not, it's nothing more than a curiosity.

One person's amusing distraction is another's golden source. Finding data which is pertinent to the questions you're asking of it is the first stage of any data analysis project, whether that means images and blogs for insight into the fashion industry, news articles and company press releases for equity markets, or expert opinions on when and where the next hurricane is going to hit the Eastern Seaboard for insurers.

The problem you face in these cases is that the data pertinent to your questions is all unstructured, or in the latter case not even necessarily recorded.

And if you're in that position you're not alone. Most data is unstructured: as much as 90% of it, according to market intelligence firm IDC.

It's the data of documents, images, audio recordings, videos, blogs, social media posts, and so on. The human heuristics to deal with the inconsistencies, inaccuracies and idiosyncrasies of these types of sources are incredible.

We all ingest, store, analyse and use it to make decisions in our heads all the time, in near real-time, and yet they are extremely challenging to deal with computationally.

As a result, most unstructured data—and let's remember that means most data—remains inaccessible to the models being built by Schreier's CEO, who is desperately trying to keep up with the herd.

Gaining Insight

Companies are finding immense value, transformative insights, from analysing the 10% of data which is structured, but there is so much more currently locked up in unstructured documents.

So how can companies tap into the opportunity hidden in this data? Well, right now there isn't a readily available suite of tools for dealing flexibly with unstructured data.

It's too complicated a process for a one-size-fits all unstructured data engine; for anything other than the most trivial data or source it's a complicated, multi-stage process.

Let's take the example of building a dataset of business

relationships from a press release archive and a news feed.

Here are some of the basic steps involved:

· Filtering the corpus for relevant articles

· Identifying people or companies mentioned in the article

· De-duplicating them (when they are inevitably described differently in different parts of the article or between one article and another)

· Establishing which of them are truly involved in a business relationship rather than simply being referred to in passing

· Clustering articles which refer to the same relationship

· Categorising the relationship described by a cluster

· Quantifying the relationships in some way

Some of these steps can be approached computationally, for instance using optical character recognition techniques to produce machine readable text if the original articles are images, named entity recognition to extract company names from the articles, and clustering techniques to group the articles together.

Such methods clearly have considerable advantages over the brute force of a purely human effort - saving significant time and money.

Although these methods are powerful they only solve part of the problem, and often with data quality which leaves something to be desired.

Their limitations derive from their relative inflexibility in terms of:

a) the range of questions that can be posed;

b) the subtlety of those questions; and

c) the potential for considerable variation between the documents and idiosyncrasies within them.

Humans on the other hand demonstrate all the flexibility, intuition and experience required to deal with these problems accurately; after all, press releases and news reports are designed for human rather than computational consumption.

It is, however, true that the balance between what automated methods can achieve and what is more accurately and practically done by humans is shifting rapidly with changes in technology.

It also varies from question to question, source to source and business case to business case. This variety in the appropriate solution for a given question—as well as the variety of tasks and questions that can be posed—shows why generic unstructured data tools are thin on the ground.

It is our belief at Hivemind that the most effective method of dealing with a range of unstructured sources is a flexible combination of man and machine.

Our software acts as a workflow tool for data processes, co-ordinating automated and human tasks as appropriate to deal flexibly with both bespoke dataset creation as described above, and practical everyday dataset maintenance.

It allows users to break down the task into bite-sized pieces and distribute them to automated or human methods as appropriate. In many cases that means automated methods to do the heavy lifting with human effort concentrated on cleaning it up and on the more complex steps better suited to human intelligence.

This framework is adaptable both to future advances in NLP or broader machine learning and also to the inevitably rich variety of questions and problems that businesses have to ask of their unstructured data.

Daniel Mitchell is Co-founder and CEO of Hivemind, a data science and technology company specialising in the application of human and machine intelligence to complex unstructured data problems.

Outsourcing is dead if not done properly: industry report

The outsourcing sector needs to sharpen its act or face losing significant business, according to business leaders interviewed in the inaugural APAC and ANZ BPO Market Report by management consulting firm Enlighten.

According to the report's findings, the sector is heading towards a "sink or swim" moment with a rapidly growing sense of dissatisfaction from BPO corporate customers towards their outsourcers. Leaders agreed that the outlook for the sector is one of tumultuous change and will remain challenging if it continues to ignore customer needs.

Tougher market conditions underpin the turbulent outlook, as BPOs face increasing pressure from new competitors, disruptive technologies and digital automation. This is compounded by the rise in client expectations. Clients are clearly demanding more than cost-effective solutions from their providers – they want quality, efficiency and a greater customer experience for themselves, as well as for their own customers.

However, there are opportunities for innovative participants in the sector, with more than half of the survey respondents (58 per cent) expecting to spend more with their outsourcers in the short-term, citing cost-savings as the primary driver. At the same time, however, close to half of the survey's respondents (48 per cent) also warned that their longer-term investment decisions with outsourcers depend on the ability of BPOs to change quickly.

Brent Churchill, Managing Director, of Enlighten says, "Cost-effectiveness is no longer enough to guarantee the future of BPOs – not when there are newer high-tech and more innovative solutions readily available. Outsourcers will get left behind if they can't find ways to deliver a great customer experience. It's a customer-driven market and BPOs can no longer simply do what they have always done in the past"

The report further found that BPOs lack innovation and are resistant to change. Of the survey's respondents, 48 per cent are concerned about the lack of visibility and transparency of results and poor quality control by outsourcers.

This combined with a lack of process automation has led to outsourcers and clients butting heads. The report also found several other obstacles that BPOs face including the threat from new technology, regulations and compliance sensitivities, and a lack of the right talent creating a massive challenge for the industry.

The report concludes that although some outsourcers are actively redesigning their operating models and management systems, there are still too many who aren't listening or addressing customers' changing needs.,The report urges BPOs to take more strategic and proactive action to address their customer's growing complaints. The future of the sector now rests on how outsourcers respond over the next 12 months.

The APAC and ANZ BPO Market Report was conducted in conjunction with Shared Services Outsourcing Network. It draws on in-depth interviews and surveys held between June and September 2018 with 200 executives from a broad range of private and publicly listed companies

Content Federation Is Not Federated Search

By Marko Sillanpää

Content Federations is one of the cornerstones of a Content Services Platform (CSP). Content federations have been growing for the last two years. Federations go back to 2000, but the concept is still new to some. I've seen some recent confusion about the difference between Content Federations and Federated Search. I thought I might provide some clarification.

Federated Search is all about taking a single search statement and running that search across multiple content stores.

Federated search goes back to at least 1999 with the Xerox AskOnce product. What started as a web search aggregator quickly filled the enterprise gap by searching content stores within the enterprise.

The challenge with federated search is that it is very difficult to combine search results effectively. A search result run against the same platform may return content with different scores because the score is based on the entire repository of content.

For this reason, many federated search engines have started to create their own index. This type of federated search engine is still not the same as a content federation as it does not support the creation or editing of content in third party repositories. They only support read capabilities.

Content federation is about giving the end users a single location to access all of the content in the enterprise. A CSP differs from Enterprise Content Management (ECM) in that CSP recognizes that content will not exist in a single repository but all of this content must work together.

Content Federations go back to 1997, but they have changed a lot in 20 years. Faster networks, stronger APIs, and more open storage architectures are all supporting the newer content federations. Content federations are now following three different approaches. Those are:

• Interoperability approach - automatically registers content from third party repositories in the content federation. This approach is used by Alfresco and Nuxeo.

• Metadata approach - requires a user to select which third party repository content will be registered in the content federation. This is the approach used by M-Files and Systemware.

• Syndicated approach - works from the direction of line of business application by ensuring that as many of these applications store their content in a CSP. This approach is used by Box and OpenText.

These approaches are all based on a single index of content being managed by the CSP and the content being treated by the CSP as if it were stored in that CSP. The goal of content federations is to create a single location for content while allowing the controlled use of content in various applications across an enterprise.

By using a content federation, the location of the content is transparent to the application using the content. This can be a line of business solution, content solution, or even another repository, like a records management solution.

Unlike a federated search platform, using a CSP as the index means all of the functionality of that CSP can be performed against the content even if it is located in a third party silo. That means workflow from one system can include content from various repositories. The end user does not need to know where that the content is stored.

Content Federations and Federated Search both have uses in an organization. Both are designed to minimize the sprawl of content across an organization's various repositories.

Content federations recognize the challenges of consolidating search results by creating cross repository indexes of content. But the real power of content federations is the ability to not only read content or metadata in another repository but the ability to write back or update metadata in the original source repository.

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.

Iron Mountain enlists Google AI to add InSight

Iron Mountain has announced the commercial availability of Iron Mountain InSight, a new SaaS content services platform jointly developed in partnership with Google Cloud to help organizations realize the full value of their vast stores of physical and digital information.

Iron Mountain InSight uses intelligent, innovative machine learning-based classification techniques to add structure, context and metadata to customers' content. With AI-based content analytics and a powerful visual search interface, Iron Mountain InSight enables organizations to mine their data to uncover new revenue and cost savings opportunities.

With the exponential growth of unstructured data across industries, most organizations recognize the potential of their data but struggle to uncover its full value due to the lack of necessary internal resources and capabilities to analyze it in a cost effective way. According to a Sept. 2018 survey of IT leaders and decision makers from Coleman Parkes and Iron Mountain, more than half (52%) indicated they plan to invest in big data analytics projects in the next two years, including AI and machine learning.

Yet 77% of respondents cited a lack of internal skills and the inability to search/access digital content as a major challenge to getting value from their data and digital transformation efforts.

Iron Mountain InSight combines Google Cloud's AI and machine learning with Iron Mountain's content analytics platform, interoperability with its Iron Cloud secure data storage services, and expertise in data analytics and metadata classification. It employs a robust process for sequencing machine learning across specific sets of data and information that executes high fidelity optical character recognition, visual similarity searches, facial and speech recognition, natural language processing, and other functions.

It runs across a variety of content types (documents, maps, spreadsheets, videos, etc .) and physical and digital sources (hard copy, backup tape, SharePoint, network file share, etc.), applying machine learning and AI-based technology to uncover trends, insights and indicators;

Delivered as a subscription-based, cloud-native platform – including optional integration with Iron Mountain Iron Cloud secure storage and services, with supporting analytics - Iron Mountain InSight enables quick implementation.

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SharePoint Folders versus Metadata: Which One Should I Use?

By Jeremy Stevenson

Folders versus metadata is a debate as old as SharePoint itself. Some people say folders are evil, and others say that folders make sense to use sometimes. Who is right?

For many people, the first instinct is to implement a folder structure in SharePoint. While perhaps easier from an analysis, design, and change perspective this doesn't take the best advantage of SharePoint's functionality.

One of the limitations of network shares is how you could organize information – essentially via folders.

By implementing a folder structure, you are dictating to the organization how they needed to store their information.

A structure that works for one individual or area may not work for another. This confusion leads to the typical issues with this approach.

Just as with network drives, in SharePoint, you end up with duplicate documents and structures, ambiguous folders, and confusion about where should I store my document. Before you know it, you are back to where you started before implementing SharePoint.

Instead, SharePoint is designed to leverage metadata in conjunction with views to allow users to group, filter, and sort their repositories how they see fit. This flexibility is not just on an individual level (via personal views) but on a team level as well (public views).

Using views means that users can organize the documents the way they want to, without having to create a competing folder structure. Metadata is also a useful tool to power navigation .

Take an example of organizing documents according to their fiscal year. In a folder structure, I would typically have a folder per year, and then within each year folder, a folder per month.

With SharePoint, and the metadata approach, if this structure doesn't work for me, I use views to group by month, by month then a year, filter to only show a specific year/month, all without having to re-architect a folder structure.

The primary reason to challenge the need for folders within an organization is once they are enabled, you cannot govern how to use them .

They are either on or off, meaning once they are on, you cannot control how deep a structure people create, or how folders are labelled. You are opening the door for that same user-centric, siloed approach that you had previously in network shares.

That said, there is an alternative when folders are desirable/ beneficial.

Where a grouping makes sense, such as an employee file, an investigation, a claim, and inquiry, it is well worth investigating document sets.

The primary advantage of document sets is you can restrict users to 1 level deep, preventing folders multiplying to N levels deep.

How Are Document Sets Different?

As mentioned above, document sets are advantageous in the fact that you can prevent users from creating an out of control folder structure by restricting them to one level.

Also, document sets allow us to declare metadata at the document set level, and "pushed down" to contained documents.

This approach means users don't have to enter the same information multiple times.

Examples of this type of metadata include:

- Property number for a property document set
- Employee Number for an employee document set
- Complainant name for the complaint document set
- Asset type for the asset
- What Are SharePoint Views?

Views are at the heart of SharePoint. They allow you to simulate a folder hierarchy without having one.

They allow you to surface documents in other areas without the need to copy them and they allow users to organize information in the way they want to, without having to take copies of documents, and without impacting other users.

Take the example of a fiscal year. In a folder structure, I would typically have a folder per year, and then within each year folder, a folder per month.

With SharePoint, if this doesn't work for me, and I have year and month as metadata on the documents, I can group by month, by month then a year, filter to only show a specific year/month, all without having to re-architect a folder structure.

From a change perspective, this is typically one of the most difficult for which users to come to terms.

Once users experience this approach, they are convinced, as it provides them with much greater flexibility than the traditional folder structure does. It will also reap the rewards from a discovery and governance perspective.

SharePoint Folders versus Metadata: Who is Right?

As you can tell from this article, we are firmly in the metadata camp in this debate. The advantages of metadata for outweigh the pain of change .

However, if you have some users that won't give up their folders, there is a compromise that can make both people happy.

Go ahead and let your users create folders. You can then use SharePoint views to create a view of the library without folders.

People that prefer folders can use the document library view that displays folders, and people that prefer metadata can use that view instead.

Jeremy Stevenson is a Principal Consultant with RecordPoint Australia.

Brother drives Europcar into the digital economy

Brother Australia has worked closely with car rental vendor Europcar, to optimise the integration of its Document Scanners with a POS Solution for processing customer identification, which is now deployed at over 150 Europcar locations throughout ANZ.

Through scalable distribution and ongoing support, Brother has played an important role in ensuring seamless integration and functionality of the Europcar POS solution that is proving an invaluable tool, enhancing productivity among staff, en masse.

The leading car rental company required a solution to streamline repetitive processes, which would in turn allow employees to focus on providing greater customer service.

The main aim was to improve document management, which could be achieved by storing digital copies of printed customer rental records.

To enact this in full, Brother executives Chuck Leszyk, Steve Bennett, and Luke Howard worked closely to devise a strategy that was suitable not only for initial deployment, but one that was also scalable to implement across the wider Europcar ANZ network.

In partnership with the distributor, Brother drew upon its technical expertise to test and validate the ADS-1600W scanner's functionality in the context of Europcar's ideal POS workflow, building a case which led to the successful acquisition of 160 units for two of Europcar's local resellers.

Brother executives continued to work with Europcar to assist in assessing the potential benefits of moving to the ADS-2800W scanner upon its development.

In partnership with Europcar Head Office Help Desk Team, Brother performed spot checks at Europcar's Melbourne metro locations to survey employee workflows and interactions with the scanners, with the purpose of exploring further refinements in the process.

In response to such observations, Brother is submitting a brief to the Help Desk Team, to provide recommendations that may help to further enhance operational efficiencies around the scanning process for the business.

Brother continues to work with Europcar on the best way to maintain their fleet for the future, focusing on a viable plan for replacing aging units.

While proving unwarranted due to the effective implementation and maintenance of the project by all parties, Brother has ensured their Custom UI Solution remains a scalable option across the ADS-2800W fleet should Europcar's needs change.

The extended 3 Year Hot Swap Support that was included in the bid for Europcar continues to provide a more comprehensive cover as well as easier and more-timely turnaround for any warranty repairs.

This corporate solution has streamlined the way that Europcar records and manages their print and digital transactions, increasing the effectiveness of employee workflows and the efficiency of the organisation's overall

Brother Australia has supplied 160 ADS-1600W scanners to Europcar resellers in Australia to improve their document management.

administrative process. However, a significant portion of the two million businesses in Australia are still experiencing the challenge of a complete transition into the digital economy.

By investing into and developing its Corporate Solutions programs, Brother aims to add value to everyday Australian businesses by providing them with expert solutions to seamlessly transition towards a digital system.

Website: www.brother.com.au

Phone: 1300 885 989

Email: corporatesales@brother.com.au

Website: http://corpsolutions.brother.com.au/

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Phone: (02) 9004 7401
E-mail: sales@abbyy.com.au
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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 Compreno-based Semantic technologies.

Blumark

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

Blumark is one of Australia's leading Case Management and Process Improvement specialists, assisting organisations with the difficult task of managing business processes and content in an efficient and cost-effective manner. Combining deep Content Services expertise with leading edge technologies including OnBase by Hyland, IBM FileNet and IBM RPA, Blumark deliver innovative and scalable solutions for process improvement. Working across a wide range of industries, Blumark leverage human, content and robotic technologies in order to improve the way organisations combine and use their content & data – increasing organisational efficiency and reducing the costs associated with repetitive tasks. Our Case Management solutions support the ways organisations do business, minimising change management, ensuring compliance and empowering knowledge workers.

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Tel: +61 2 8596 5100
Fax: +61 2 8596 5175
Email: info@esker.com.au
Web: https://www.esker.com.au

Esker is a global leader in cloud-based document process automation solutions. Esker's solutions are compatible with all geographic, regulatory and technology environments, helping over 11,000 companies around the world improve efficiency, visibility, and cost-savings associated with the processing and exchange of information. Founded in 1985, Esker operates in North America, Latin America, Europe and Asia Pacific with global headquarters in Lyon, France and U.S. headquarters in Madison, Wisconsin and AUS/NZ headquarters in Sydney, Australia since 1997. Esker's solutions span the order-to-cash and purchase-to-pay cycles — allowing organisations to automate virtually any business process:

- Order Processing: automated entry and routing of incoming customer orders
- Accounts Receivable: automated sending and archiving of paper and e-invoices
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- Accounts Payable: automated entry and routing of incoming supplier invoices
- Purchasing: electronic processing and delivery of supply chain documents

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

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

New innovations include:

- Overhead contactless scanning of fragile documents, thick books and oversized items;
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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:

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Robotic Process Automation can impact just about any business for the better. And the ROI is nearly instant when you consider the cost difference between full-time effort and an RPA solution. And that doesn't even take into account eliminating risks associated with human error and privacy concerns.

- 32% of transportation and logistics companies still rely on manual steps in more than half of all processes
- 50% of manufacturing companies still use manual processes for monitoring critical supply chain and planning activity
- 34% of all financial organizations rely on manual processes
- The top efficiency challenge for CFOs in the insurance industry is manual processes
- 47% of AP professionals consider manual data entry and inefficient processes as their biggest challenges

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Contact: Byron Knowles, Business Development Manager - APAC
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Email: bknowles@opex.com
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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.

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Email: info@kapish.com.au
Web: http://kapish.com.au/

Kapish is a member of the Citadel Group (ASX: CGL).
Citadel solve complex problems and lower risk to our clients through our tailored advisory, implementation and managed services capabilities. With over 250 staff nationwide and an ability to 'reach back' and draw on the expertise of over 1,500 people, we are specialists at integrating know-how, systems and people to provide information securely on an anywhere-anytime-any device basis.
Servicing both large and small, public and private sector organisations across all industries, our team of highly qualified staff have global experience working with all versions of Micro Focus Content Manager (CM). It is this experience coupled with our extensive range of software solutions that enable our customers and their projects to be delivered faster, more cost effectively and with more success. At Kapish we are passionate about all things Content Manager. As a Tier 1, Micro Focus Platinum Business Partner, we aim to provide our customers with the best software, services and support for all versions of the Electronic Document and Records Management System, Content Manager. Quite simply, our products for CM make record-keeping a breeze. Kapish was awarded the HPE Information Management & Governance – Partner of the Year 2017 award.

EzeScan

Phone: 1300 393 722
Fax: (07) 3117 9471
Email: sales@ezescan.com.au
Web: www.ezescan.com.au

EzeScan is one of Australia's most popular production capture applications and software of choice for many Records and Information Managers.
This award winning technology has been developed by Outback Imaging, an Australian Research and Development company operating since 2002.
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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:

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FileBound is an end-to-end process automation solution for enterprises of all sizes. FileBound is a cloud-native document management system with advanced workflow capabilities that automates the flow of enterprise work. This comprehensive enterprise content management (ECM) solution features capture, document management, workflow, electronic forms, analytics, mobile access (IOS and Android) and much more. It presents in a single, easy-to-use application that manages business processes from beginning to end and reliably connects people and information.
FileBound provides organisational efficiencies, drives out manual paper-based processes to decrease costs, increase productivity and support compliance with internal and external mandates. FileBound users have the flexibility to create a variety of solutions from complex AP automations to simple document archival and retrieval processes.

Alaris

Contact: Angelo Krstevski
Email: Angelo.Krstevski@kodakalaris.com
Tel: 0419 559960
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.
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PSIGEN, PSICapture is an innovative document capture platform engineered to combine automation, efficiency, stability and Enterprise-class scalability. PSI:Capture provides unmatched integration with just about any ECM or ERP platform [e.g. SharePoint, Xero, Trim, Objective etc.] and allows the utmost in flexibility for deployment in large or small organisations.
Whether you want a simple scan workflow or complex document capture, PSI:Capture provides a solution to meet your specific needs. Document Capture and Scanning is a challenge in any organization.
With an array of scanning devices, capture needs and backend content management systems, it is ineffective to settle for multiple applications to accomplish one goal.
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Epson is a global innovation leader dedicated to exceeding expectations with solutions for markets as diverse as the office, home, commerce and industry. Epson's advances in scanning technology deliver the perfect balance of speed and reliability for image reproduction of unbeatable quality. From compact mobile scanners to A3 flatbed scanners that operate at speeds up to 70ppm, the range is designed for a variety of demanding organisations where fast and easy document management is required. Combine that with high productivity software that allows networking and 'scan to' options including the cloud, its versatile functions dramatically expand data usability and online document workflow.

FineReader adds More PDF Standards

ABBYY FineReader 14 now has added support for the latest PDF ISO standard and improved functionality to create PDF/UA (Universal Accessibility) documents. Along with improved optical character recognition (OCR) for Japanese and added Hanja symbols for documents in Korean, FineReader 14 is a more powerful PDF productivity tool for global organizations needing to offer digital information easily accessible to the public.

"FineReader delivers a wide range of tools for PDF viewing, editing, commenting and conversion workflows, powered by highly accurate OCR capabilities, which makes it the ideal PDF tool for business use," stated Slavena Hristova, Director of Product Marketing, FineReader at ABBYY.

"The latest update is especially relevant for government and public sector organizations that need to meet accessibility regulations that ensure digital content, such as public services and cultural heritage, is equally available to people with disabilities."

Benefits of expanded support for more PDF ISO standards include:

- Alongside earlier specifications of PDF 1.7 (ISO 32000-1), FineReader 14 now supports opening and viewing of PDF version 2.0 documents, which follow the specifications of the latest ISO standard 32000-2.
- In addition to the previously supported PDF/A document format for long-term archiving purposes, FineReader 14 now supports creation and opening of PDF documents, which comply with the PDF/UA (ISO 14289) sub-standard of PDF.
- PDF/UA enables users with disabilities to easier navigate through the content of PDF documents using assistive technologies.
- Helps organizations meet global standards for accessibility such as the UN Convention on the Rights of Persons with Disabilities ; the Americans with Disabilities Act (ADA) Title II; the European Accessibility Act , Directive (EU) 2016/2102 and provide inclusive services to the public.

A free trial of FineReader 14 is available.

www.abbyy.com/finereader

Printing on the go with Brother

Brother Australia has launched a new range of mobile receipt and label printers with major improvements in performance, connectivity, deployment and battery power, designed for tough logistics workflows. The new RJ-4200 series now come with Mobile Deploy, a cloud-based app that facilitates fast, easy deployment of printers by enabling remote updates.

Mobile Deploy enables remote configuration of printers in the field - virtually eliminating the need for IT to physically configure or update devices in the office or instruct over the phone. Using the Mobile Deploy app and an internet connection, updates can be pushed directly and simultaneously to field operators' smart devices. Whether updating one printer or an entire fleet, the operation can be performed simply and easily from one central location.

The Brother RJ-4200 Series is currently comprised of two models: the RJ-4230B ($1299, available now) and RJ-4250WB ($1399, available in 2019).

Both include a 3000mAh smart battery, snap on belt clip, roll holder stop, and strain relief clip. The RJ-4230B comes equipped with a Bluetooth radio and the RJ-4250WB has both Bluetooth and WiFi radios. The mobile printers incorporate reliable, hassle-free thermal printing technology with no messy inks, ribbons or solvents to deal with. They feature ultra-rugged construction with reinforced parts, industrial-grade tactile buttons and moulded rubber housing engineered for improved toughness, 2.1m drop protection and IP54 certified.

www.brother.com.au

Covata promises 'Single Pane' Visibility and Control over Sensitive Data

An Enterprise Security Console launched by data security specialist Covata promises to provide C-level executives, information owners, and IT administrators with a single pane of glass to discover and understand where sensitive data is stored and whether it is appropriately secured.

The company says it offers users with the ability to classify, protect, and control their information, reducing risk and improving the management of sensitive and regulated, unstructured data.

Within a typical enterprise, unstructured data such as files and emails are entirely ungoverned leading to wasted resources, quality issues, and unmanaged risk. By providing a continuous view of this information and its risks, Covata's Enterprise Security Console helps reduce costs and data quality issues caused by storing unnecessary information.

By balancing centralized control and user empowerment, the console helps to prevent unauthorized access while relieving users from the need to manage regulatory compliance.

"We are excited to continue expanding Covata's capabilities to help organizations protect and control their sensitive data," said Covata's Head of Product and Delivery, Hugh Stodart.

Covata's Enterprise Security Console tackles security challenges across a wide range of industry verticals. The lack of visibility and control over unstructured information represents a massive gap in risk management practices within the financial services sector.

Within healthcare, data quality issues can cause inaccurate analytics results leading to poor medical care, at best. Governments overwhelmingly struggle with inaccurate data classification, which simultaneously increases costs due to over-classifying and increases risk due to under-classifying.

In the digital era, an organization's inability to properly maintain access governance and data encryption causes privacy compliance exposure.

Covata's Enterprise Security Console empowers businesses to discover, protect, and control their sensitive information across multiple platforms with security for SharePoint & Office 365, Secure Enterprise File Sharing & Collaboration, and Access Security Broker capabilities through an API translator.

For more information visit https://covata.com or contact the Covata Sydney office on 02 8412 8200.

Diligen smartens up NetDocuments Contract Review

Diligen, developer of an artificial intelligence (AI)-based contract assistant, has announced new native integration with NetDocuments, the cloud-based content services platform for law firms, corporate legal teams and compliance departments. The integration allows users to simply and securely summarize and analyse legal documents using Diligen's AI and Machine Learning tools.

Diligen eliminates the tedious manual work tied to contract analysis by helping lawyers identify critical provisions and sort and summarise contracts automatically.

This new integration means documents can be analysed without ever leaving the secure NetDocuments ecosystem. This allows CIOs to balance their need for security while giving lawyers tools for faster, higher quality contract review.

"NetDocuments' AI Marketplace is open to software and technology providers to deliver embedded machine learning functionality for an improved understanding of matter, contract, and transactional content across NetDocuments' global customer community.

For more information visit: diligen.com/netdocuments

Epson launches fast Photo Scanner

Epson Australia has launched its new Wi-Fi enabled FastFoto FF-680W High-Speed Photo and Document Scanning System. The FF-680W scanner is claimed to be the world's fastest personal photo scanner, scanning thousands of photos – as fast as one photo per second at 300dpi - at up to 36 photos per batch. Postcards, panoramic photos up to 36 inches and Polaroid photos can be scanned. It also offers photo restoration, editing and smart file organisation tools.

The FastFoto scanner software makes it simple to share images to cloud services such as Dropbox and Google Drive.

Featuring Epson ScanSmart software, the FastFoto FF-680W scanner is also a powerful document scanner. Using the software users can easily scan, organise, email and store important contracts, receipts, documents and files. In addition, you can easily edit documents and save time with automatic file naming and use powerful productivity tools such as the built-in Nuance OmniPage Optical Character Recognition (OCR) which enables users to create searchable PDFs, plus editable Word and Excel files.

The Epson FastFoto FF-680W scanner (RRP $799) offers both USB and wireless connectivity.

www.epson.com.au

DocsCorp pdfDocs 4.5 adds full integration with iManage Work 10.2

DocsCorp has announced the release of the newest version of its PDF creation and editing software, pdfDocs (4.5 U4b), with full support for iManage Work 10.2. This latest version fully integrates with iManage Work 10.2 via the modern REST API.

Other PDF solutions still require iManage FileSite or DeskSite to integrate. pdfDocs 4.5 U4b is available for immediate download or purchase.

iManage Work 10.2, the newest version of the powerful cloud-based solution from iManage, a market leader in document and email management, delivers powerful new features, new supported platforms and enhanced search capabilities designed to increase user satisfaction and adoption. pdfDocs 4.5 U4b integration supports the editing, opening, and saving of PDF documents from within iManage Work 10.2 in the browser to deliver faster and more efficient document workflows.

"DocsCorp solutions are iManage Work 10.2 ready, so when users are ready to move to Work 10 we are ready to move with them," said DocsCorp President and Co-Founder Dean Sappey.

"As a leading iManage technology partner, we have worked closely with their engineers to release a pdfDocs that is 100% in alignment with the Work 10 vision – a product that will empower iManage users to be more productive no matter where they are or what device they are on."

pdfDocs is a project-centric PDF management application that gives users the ability to create, collate, edit, redact, annotate and secure PDF content. Users can print, email and save documents from within the unique Organizer workspace as well as profile documents into a document management system. Users can set up Organizer workspaces for specific cases, matters or projects complete with output and security settings, which can be shared on a network drive. pdfDocs integrates with iManage and other leading document and case management systems.

http://www.docscorp.com/

Contextual Document Tagging

DBI Technologies has launched a software solution for automatically processing Microsoft Word (.docx) and Text (.txt) files of any subject matter into each file's own list of contextually accurate document tags.

The finished result places contextually accurate tags into the document's own profile Tag Property, elevating the processed documents into accurately relevant searchable resources.

Long lost content can now be turned into valuable resources automatically by surfacing a document's key subject matter as key-phrase Tags making the content fully searchable by the file's contextually accurate document description tags.

Doc-Tags is a software product that automatically creates a contextual list of accurate descriptive keywords and key-phrases (Tags) for any Microsoft Word (.docx) or text (.txt) file.

Operating in any one of six international languages; English, French, German, Japanese, Korean and Spanish, Doc-Tags automatically generates lists of contextually accurate Tags (key words) for a document and adds them to the file's Metadata - specifically the file's Tag Property. A Doc-Tags processed document becomes immediately searchable by its new set of contextually accurate key-phrase tags.

Unlike other keyword software, DBI dispenses with an industry common practice of using referential list comparison strategies (Bayesian and Heuristics) using its own xAIgent service to deliver contextual accuracy in an automated structure that does not require subject domain specific training.

Doc-Tags will take content of any subject matter (in any one of six supported languages) and automatically turn that content into a descending list of contextually accurate key-phrase Tags ranked from most relevant to least relevant.

xAIgent, found at the heart of Doc-Tags, is a patented machine learning and artificial intelligence-based key term extraction web service.

In addition to automatically surfacing a document's contextually accurate key-phrases (Tags), Doc-Tags also provides its users with a relational XML database, which keeps track of each document processed and the tags generated by document, giving the user incredibly useful relational reporting.

Document Tagging is a critical component of Document Management and Content Retrieval systems allowing for Accurate retrieval of content in perfect context of the subject of interest. Automatic Document Tagging works well with Content Management Systems (CMS), as well as localized implementations where Doc-Tags can process a hard drive load of documents turning unstructured content into contextually accurate, searchable information.

http://www.Doc-Tags.com

Ephesoft Transact 4.5.0.2 unveiled

Ephesoft has unveiled the latest release of Ephesoft Transact 4.5.0.2. This latest version enhances usability for the cloud-based Ephesoft Transact 4Mortgage vertical solution.

Transact 4Mortgage includes over 600 loan origination document types that are already trained and configured for classification with Ephesoft Transact. This allows mortgage finance customers to save up to 2,000 hours of implementation time or approximately an 80% reduction in configuration and deployment. Lenders, loan officers and mortgage processors using Transact 4Mortgage will enjoy improved accuracy and efficiency to close more loans within days, instead of weeks or months.

Swagger UI support allows modern, easier, self-documented Web Services for developers. Additionally, this technology is used to create two advanced workflow Web Services OpenAPIs for both Nintex and Microsoft Flow .

JSON technology (JavaScript Object Notation), a lightweight data-interchange format, is used, making it easier for humans to read and write and it's easy for machines to parse and generate. These features benefit both developers and non-developers alike by leveraging 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 and increasing efficiency, accuracy and time savings.

The Microsoft Exchange Header Support feature is now available for support on both on-premise and cloud platforms. Users can now configure Transact to ingest documents through Microsoft Exchange and leverage EWS for header metadata within the batch.xml file.

Adding on-premise support provides more availability to customers and expedites processing through the system.

Ephesoft Transact 4.5.0.2 offers PDF/A-1b Compliance and supports searchable single and multi-page PDFs in both black and white as well as colour. The enhancement helps customers put in place more advanced archiving and long-term preservation of electronic documents into their repositories.

Significant performance improvements have been made to the Fixed Form Extraction process for Windows, often used for data extraction from checkboxes and signature detection. Customers using 16 cores will see improvements up to 70% to 80% while users of 32 core systems will see impressive improvements up to 250% up to 300% performance gains. The faster processing of pages per minute allows companies to quickly access their data, make more informed decisions and improve customer satisfaction.

www.ephesoft.com/

Esker Purchase-to-Pay adds PunchOut Catalogue Feature

Esker has announced the launch of a new PunchOut catalogue feature for its Purchase-to-Pay (P2P) automation solution. Esker's new functionality enables users to "punch out" from their procurement application to select online catalogues so that they can order anything online without leaving Esker's P2P solution. As a result, users save time while purchasing at contract-negotiated prices.

Esker's cloud-based, AI-powered platform automates the entire P2P process, eliminating manual tasks from purchasing and accounts payable, such as: supplier information management, contract management, procurement, accounts payable (AP) automation, expense management, payment and supply chain financing.

"We are continuously enhancing the scope of our P2P solution, particularly electronic purchasing, to help our customers get their spend management under control," said Catherine Dupuy, senior product manager at Esker.

"By combining e-commerce with our P2P solution, users can place orders directly on Amazon, Dell, Staples, etc. without ever leaving Esker's solution. Users benefit from a seamless uninterrupted workflow process — they can search, select and have their purchase approved in one go."

Esker's PunchOut catalog feature delivers significant benefits to P2P solution customers, including:

- Once items are placed in the online cart, the purchase requisition is automatically sent for approval according to a predefined workflow. Approvers can then validate the requisition directly on Esker's portal or via Esker Anywhere, Esker's mobile application. Once approved, the requisition becomes an order and is transmitted to the vendor.
- Real-time metrics and reporting capabilities increase visibility and control over spend, helping companies reduce maverick spending and bringing more spend under management.
- Item availability and prices are always up to date with no maintenance required on the customer's end.

www.esker.com.au

ABBYY Recognition Server Rebrands

ABBYY has announced the rebranding of its most powerful server-based optical character recognition service ABBYY Recognition Server as ABBYY FineReader Server. The step aims to further consolidate all ABBYY OCR and PDF conversion offering under the FineReader brand.

The renamed service also received a major performance and functionality update. The new version, ABBYY FineReader Server 14, is powered by the next generation of ABBYY's intelligent OCR technology, offers improved barcode recognition and native 64-bit support.

The API improvements and access to servers installed in remote locations, including Microsoft Azure, add to accessibility and scalability.

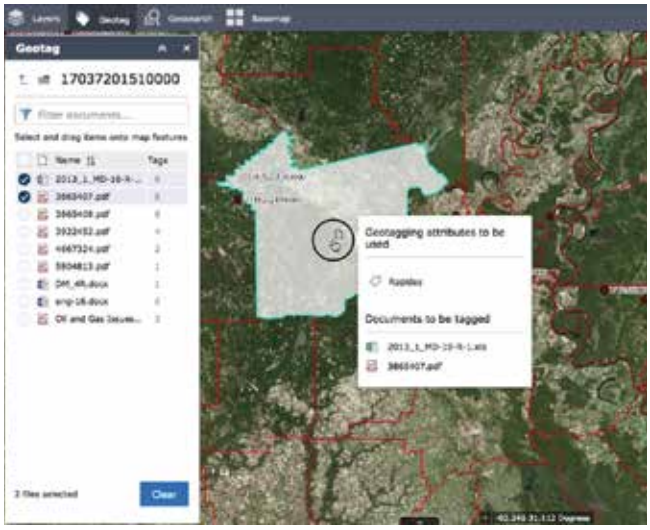
The updated service also supports new PDF standards such as PDF/UA and smart detection of PDF quality. Furthermore, FineReader Server's operator station now has a completely re-designed, intuitive interface empowering all users to start conversion processes, no special training needed. The newly added text redaction, indexation, and document assembly tools allow for more flexibility in document-related workflows.

"This rebranding is part of our coordinated effort to make ABBYY's expansive product portfolio easier to navigate for our clients and partners. FineReader Server perfectly complements the FineReader product family, which includes our market-leading OCR and PDF conversion solutions for businesses and individuals. The rebranding comes hand-in-hand with a major product update designed to significantly accelerate and simplify core business processes such as digitization of documents for further processing with eDiscovery and digital forensics systems; long-term document storage and compliance; integration with SharePoint and many more," comments Bruce Orcutt, Senior Vice President of Product Marketing at ABBYY.

ABBYY FineReader Server is a server-based intelligent OCR service for automated document capture and PDF conversion. Designed for high-volume conversion, ABBYY FineReader Server automatically converts large collections of documents into searchable, shareable digital libraries. The service converts scanned and electronic documents into PDF, PDF/A, Microsoft Word, or other formats for search, long-term retention, collaboration, or additional processing – quickly, accurately, and automatically.

Contact ABBYY at sales@abbyy.com.au or on (02) 9004 7401 for any further information.

Esri develops a easier way to view Microsoft SharePoint content



Esri has announced a new capability in ArcGIS Maps for SharePoint that lets users map and search SharePoint content more easily. Called ArcGIS Map Search, the app part allows ArcGIS Online and ArcGIS Enterprise users to drag files hosted in SharePoint onto a map to geotag them for easy search later.

Now, when an oil company has an emergency at one of its oil wells, for example, employees responding to the incident can open up a map of all the wells in ArcGIS Maps for SharePoint; click on the one where the accident occurred; and immediately find all the documents related to that well, including permits and safety records.

Users have been requesting this tag-and-search capability more frequently in recent years, and it is now available in ArcGIS Maps for SharePoint 5.0 - one of the most significant releases since the first version came out in 2010. ArcGIS Map Search, accessible in 30 languages, is supported in Microsoft SharePoint 2010, 2013, 2016, and SharePoint Online.

The app part contains two main components: geotag and geosearch. The process starts at geotagging. Users can add a reference layer to an ArcGIS Map Search map and specify which attribute from the layer's data to use for geotagging. When users drag documents onto the configured layer, the attribute generates a geospatial tag, or geotag, for those documents. System administrators can configure system-wide tags as well, which ensures that tagging is uniform across the organization.

When users needs to look for the data related to a specific location, he or she can open the SharePoint page with the ArcGIS Map Search map, and it will start in geosearch mode. By clicking or tapping a point, line, or polygon on the map, the user can view all the documents that have been tagged with that feature. He or she can also type keywords into the search bar to see the list of documents tagged with those specific location attributes.

The latest release of ArcGIS Maps for SharePoint elevates what users can do when they work with ArcGIS and SharePoint together. When organizations can see and arrange their SharePoint data on a map, they save time and energy in their work and, ultimately, make better business decisions.

ScanSnap iX1500 compact scanner

Fujitsu has launched a new personal document scanner, the ScanScap iX1500, featuring a screen interface that can be setup to offer pre-programmed scans with the touch of a button.

The iX1500 features a 4.3 inch touch screen that can be configured to save information to specific destinations based on individual user preference.

Each scanner comes with 4 individual licenses to ScanSnap Home, Fijitsu's software to manage scanning and organising of documents, business cards, receipts, photos, and more via folders, tags and keywords.

This includes intelligent automatic image processing functions, such as Automatic Colour Detection, Automatic Size Detection, Automatic Rotation, De-skew and Blank Page Removal.

ScanSnap Home automatically names and suggest titles for scanned documents based on content. Suggestion accuracy is improved the more titles are repeatedly edited, avoiding the need to spend time on repetitive corrections. Corrections made to company names attributed to scanned business cards, for instance, are reflected on successive scans with the same attributed company. The iX500 scans 30 sheets/minute in colour-duplex mode, offers built-in Wi-Fi with Direct Connect Mode and supports 5GHz Wi-Fi. It retails for $A849/$NZ949

www.fujitsu.com/au

Infor tackles Expenses with Itemize

Infor has announced a new collaboration with Itemize Corp., an expense document data extraction provider headquartered in New York City. Paired with Infor's travel and entertainment (T&E) expense management solution, it uses cloud technology and artificial intelligence to automatically capture receipt data and transfer that data to Infor Expense Management (InforXM).

Founded in 2012 by payments industry veterans, Itemize operates an extraction engines for receipts, hotel folios, and invoices. Itemize is available as a standalone service via an app for Android and iOS, or as an API able to be integrated into enterprise applications.

Infor will take this path by integrating Itemize into InforXM, its cloud-based application for use by backoffice staff in managing processing of employee expenses. Data extracted from Expenses via Itemize will then flow into Infor (or other erp applications).

Staff submit expense reports and scanned receipts via the InforXM Web portal, with Itemize providing cloud-based scanning and OCR. Itemize utilises a range of OCR engines and machine learning models.

"We combine our own proprietary OCR engine that we've spent 6 years perfecting, along with commercially available OCR engines to provide the best results to the end user. With a 98% accuracy guarantee," said Ryan Courtade, Director of Product, Itemize Corp.

Itemize offers receipt and invoice processing solutions and is currently targeting English, French, and Spanish language markets. Including: US, Canada, Australia, New Zealand, Mexico, France, and Spain. The company currently supports users in over 25 countries and processes more than a million documents a month through its cloud-based platform

"As corporate employees ourselves before starting Itemize, we recognize the burden employees bear in manually tracking expenses and entering receipt data into systems," said James Thomas, Founder and CEO of Itemize.

"We are pleased to support Infor in offering a solution to designed to help address this challenge. In addition, the Itemize solution can also help financial managers streamline the task of monitoring policy compliance via improved data quality. ."

Infor Expense Management is designed to offer unique and insightful capabilities for spending control, reporting, and analysis. Customers can actively manage employee-initiated expenses while on the go, thanks to mobile capabilities and cloud deployment, which can help reduce those costs without impeding business. Infor Expense Management can help automate expense-related business processes with social collaboration tools, enforce policy compliance, cut administrative costs, and reduce the risk of accidental errors and intentional fraud.

https://www.itemize.com/

JotForm transforms Form Data

JotForm has launched a PDF Editor that promises to make it easy for anyone to turn online form response data into professional and polished PDFs. Using a familiar drag-and-drop interface, users can move data fields anywhere on the page. Fonts and colours can be customized so the final document matches any company's brand. Logos or other images can be inserted with a few clicks. Users can set up a PDF document design and all form submission data will automatically use this same design every time.

JotForm also offers several electronic signature options, so users can select one that best meets their needs. JotForm's core product is the form builder, which allows users of any skill level to create web forms without knowing how to code. The product is commonly used to create registration forms, application forms, contact forms, order forms, request forms, feedback forms and surveys. JotForm also integrates with business workflow solutions, such as CRMs like Salesforce, email marketing services, payment processors and cloud storage services so that users can automate processes and do more with the information they collect.

www.jotform.com

How to Preserve Business Records from Email Deletion Policies

MxHero, the developer of the email to cloud integration t echnology Mail2Cloud, has launched a solution aimed at helping companies preserve critical business records found in emails from automatic deletion imposed by retention policies.

Many organizations are implementing email retention policies that delete all email messages over a certain age, for example, after 90 days. By eliminating emails, companies significantly reduce breach and litigation risks.

However, the challenge is that email is a primary means of communication and often contains important business records such as attached contracts, employee records, key client communications, written agreements.

MxHero's Mail2Cloud provides automated and selective extraction of business record content combined with intelligent filing to secure storage targets, such as, Box, Egnyte, Google Drive, OneDrive, etc.

"Preserving email is a security and litigation risk. Companies are increasingly adopting short retention policies for the email communications. However, given that much of business is conducted over email, how does a company not 'throw the baby out with the bath water'?" states Alex Panagides, CEO, mxHero Inc.

http://www.mxhero.com

Identifying and Protecting Critical Data with Machine Learning

TITUS, a provider of data protection solutions, has announced TITUS Intelligent Protection, which adds machine learning advances to its TITUS Classification Suite for Windows and TITUS Illuminate solutions. TITUS Intelligent Protection enables TITUS users to train their solutions to add an element of automation to the identification and classification of documents and emails.

"As much as we want people to be our strongest security link, they can benefit from the assistance machine learning provides," said Mark Cassetta , senior vice president, product management and strategy for TITUS.

"Machine learning is the first technology that actually scales and produces a repeatable way for expert views and definitions, in any enterprise, to be made available to every employee.

By enabling organizations to harness the power of machine learning in concert with their current information security policies, TITUS Intelligent Protection offers the ability to scale their existing data protection strategy efficiently and effectively, without placing an additional burden on their employees."

TITUS provides a data-driven workflow that is designed to build valuable information from which knowledge can be derived. This methodology enables organizations to create a data protection strategy that best suits their unique needs.

Capabilities immediately available include:

• Confident automation and protection of sensitive information: TITUS Intelligent Protection offers organizations the ability to build and train models that reflect the sensitive information unique to their organization. This enables the organization to confidently apply automation to the detection, classification and protection of their sensitive data.

• Machine learning-assisted classification: With the integration of TITUS Intelligent Protection capabilities, users will see a recommended classification for content they've created based on the recommendation of their machine learning model. This lifts the burden from end users, who then only need to simply confirm the classification as opposed to determining the category on their own.

• Extend intelligence to the ecosystem: After TITUS applies intelligence to identify sensitive information, that identity travels with the data. This helps optimize an organization's security strategy by bringing a rich set of context to rights management and/or data loss prevention solutions, including cloud access security brokers (CASBs) and/or next-generation firewalls.

http://www.titus.com/machinelearning

OpenText Extended ECM for Dynamics365

OpenText has announced the availability of OpenText Extended ECM Enabler for Microsoft Dynamics 365 for Customer Service. The integration of OpenText's ECM solutions with Dynamics 365 for Customer Service enhances business processes, specifically in sales and service scenarios such as lead-to-cash and problem-to-resolution. The OpenText Extended ECM Business Workspace is at the centre of the integration. It allows customer-facing roles to remain within the Dynamics 365 business application, while simultaneously having access to the full breadth of information and documentation from across the organisation needed to provide efficient customer service. Users can also benefit from a tighter integration with Microsoft Teams.

Google and OpenText have announced they will work together to deploy OpenText's EIM solution suite on Google Cloud Platform. This work will include a containerised application architecture for flexible cloud or hybrid deployment models.

OpenText has selected Google Cloud as its first partner to support OpenText Anywhere to deliver hyper-scale hosting functionality to customers.

Meanwhile, OpenText has also announced a series of new SaaS-based applications for the legal, life sciences and HR markets on its own cloud platform, OT2.

New OpenText applications built on OT2 include:

• OpenText Legal Center - a cloud-based, process-centric approach to addressing specialised legal use cases like client on-boarding, external sharing & collaboration, and document management.

• OpenText Quality Center - building on OpenText Documentum for Life Science and OpenText Life Science Express to deliver secure collaboration solutions for the highly-regulated life sciences sector.

• Extended ECM for SuccessFactors Public Cloud Edition - the latest collaboration between SAP and OpenText, delivering secure content management solutions for SAP's talent management platform.

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- New iSOP® (interpretive SOund Protector) paper-feed management
- Fail-safe high-speed scanning mechanisms for fastest in class operation
- USB 3.0 support
- Fast startup

Decentralised capture and digitisation

The latest fi-7180 and fi-7280 high-speed Fujitsu A4 image scanners automate the tasks of digitising business data as never before. Main features include new smart paper protection functions, better image quality, improved Optical Character Recognition (OCR) and data capture performance. Overall there is 33% faster performance and 60% greater document batch capacity.

The new scanners 'listen' for problems in the paper feed, warning you and stopping the flow before your important papers are damaged.

If you would like more information, please visit:
www.fujitsu.com/au/scanners

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Document Capture PRO