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information & data manager

Feb-Mar 2019



OVERCOMING
DIGITAL BUSINESS
ROADBLOCKS

9

PRINCIPLES FOR
RECORDS MANAGEMENT
BEST PRACTICES

IS THERE VALUE IN
UNSTRUCTURED DATA?



E-Invoicing.

The State of Play in Australia



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FROM THE

editor

I am excited and pleased to bring to our readers the first print edition of Information & Data Manager magazine.

Keen-eyed readers will notice a shiny new IDM masthead as well as small but significant change to the wording behind the acronym. Since its birth back in the early Internet era, IDM has stood for Image & Data Manager, with the "Image" in the title signifying the scanned document. Images present their own distinct challenges for asset management, but IDM has always been dedicated to the broader field of document management, business process and workflow, with the scanned document 'image' as the jumping-off point.

As we move into an era where "Born Digital" becomes more than just a catchcry, IDM is rebranding as "Information & Data Manager" to better represent the totality of the unstructured data challenge represented by all that stuff held in email, network folders, business applications, cloud fileshares, content and document management systems, etc. What is the latest Gartner figure, 80%, 85%, 90% of all enterprise data? It seems to creep up with each passing year!

Information & Data, you can't have one without the other, but they do represent separate management challenges. There are exciting times ahead as advanced techniques in machine learning, AI, text analytics and natural language processing (NLP) are applied to both and integrated into everyday tasks within business and government.

IDM will continue to report on these exciting developments and remains committed to a multifaceted print and online distribution strategy, which in 2019 will evolve to include regular distribution of an "ePDF" edition of the magazine including bookmarks, links within the PDF, links to other PDFs, Web sites, eForms and rich media.

The online reception of the weekly IDM email newsletter continues to grow, with clickthroughs and site visits up 20% in 2018! A remarkable number.

I hope that you enjoy reading our 'first' edition as much as we enjoyed creating it. Have fun exploring!

**Bill Dawes
Publisher/Editor**

**Make sure to subscribe to the IDM weekly
newsletter at idm.net.au**

Whole-of-Government Records program nears “alpha” phase



The Department of Finance has issued a two year, \$1 million contract with the Australian National University (ANU) to refine and test a fundamental element of its Digital Records Transformation Initiative, the Australian Government Records Interoperability Framework (AGRIF).

The ANU research is scheduled to continue until December 2020. Meanwhile Finance has begun a program in collaboration with the Digital Transformation Agency (DTA) to “co-design” a new approach to record-keeping across Australian Government. This will seek to automate common records management tasks through the application of semantic technologies and machine learning.

While the co-design process is being undertaken, a moratorium on new investment in records management solutions by Commonwealth agencies remains in place until June 2019. Agencies continue to be able to upgrade their existing solutions.

When asked for an expected completion date for the whole exercise, the Department did not provide a date, merely responding: “We are using an Agile Project Methodology and anticipate that the discovery and alpha elements of the co-design process will be finalised by mid-April.”

The Whole of Government Records Management as a Service (WoG RMaaS) project (as it was then known) was allocated \$A9.1M in the 2016-17 Budget.

The department will not identify which vendors are taking part in the process of establishing a new Whole-of-Government arrangement for purchasing records management technology. It selected the initial participants from a “representative sample” of the 29 responses it received from industry and government to its Discussion Paper issued in November 2018. The responses have not been made public.

Job applications were recently advertised for a Senior User Researcher and Senior Service Designer for the co-design project, working from January to March 2019, with an extension if required

According to a Finance statement, the co-design process “is not an approach to market, but it will lead to a sourcing approach. The co-design process will include face-to-face user research sessions (individual meetings), communities of practice and workshops.”

“Finance is developing a maturity model based on several dimensions of capability with the aim of improving government’s investment on information management, and enabling vendors to develop and offer solutions to meet the changing business requirements of government.

“This model is intended to describe the capability of the Australian Government and industry. Requirements are expected to be further refined; and additional requirements added through the co-design process.”

A preferred approach to sourcing record-keeping systems will be determined through the co-design period, which may or may not culminate in a Request for Proposal (RFP).

Finance has also sought to deny that it hopes to emerge with a single solution or “suitable solution”, or that it intends co-designing its own.

“This is not the intent of the Initiative, as the Commonwealth is seeking to establish a whole of Government sourcing arrangement with a number of vendors that have a range of appropriate capabilities.”

The Australian Government Records Interoperability Framework (AGRIF) being refined and tested at the ANU is envisaged as a fundamental element of the new era for record-keeping, providing “a semantic information model (or ontology) that clarifies the meaning of data associated with the structure and functions of the Australian Government.”

The testing phase will last from 2-Jan-2019 to 23-Dec-2020, according to the contract.

When asked if this testing will need to be completed before a whole of Government sourcing arrangement is put in place, the department responded: “The development of the sourcing arrangements will not be dependent upon testing of the AGRIF, although both contribute to the objectives of the DRTI.”

Kodak Alaris & Newgen in new Global Alliance

Kodak Alaris and Newgen Software have announced a new global strategic alliance that will see both companies expand, connect and grow their network by jointly recruiting partners with similar profiles to help sell their solutions.

Kodak Alaris scanners are now included on the Newgen certified document scanner list. The alliance is expected to generate new business opportunities for channel partners that work with Alaris and Newgen across geographies, vertical markets, and applications.

Through its comprehensive scanner portfolio, scalable capture software solutions and expert managed and professional services, Kodak Alaris enables organisations to automate business processes and take complexity out of information capture.

Newgen’s solutions extract greater value from enterprise data systems integrating with content repositories across multiple sites to eliminate redundant processes. Newgen leverages new-age technologies such as cloud, robotic process automation (RPA) with business process management (BPM), digital sensing, enterprise mobility and process analytics to help organizations reinvent their workplaces.

“We’re excited to collaborate with Newgen Software,” said Vanilda Grandó, Global Sales Development Director for Alaris, a Kodak Alaris business.

“Partners play a key role in delivering value to our customers. Together, we will help organizations make sense of their data, achieve compliance and create transparency and efficiency throughout their operations.”

WHY
should I upgrade?

Is a new one
really **THAT** much
better?

I **LIKE** my
old scanner.

I **CAN'T**
afford a
new one.



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- Get new Perfect Page features like streak filtering for correcting conditions you can't control like dust - plus auto orientation, image edge fill, hole fill, sharpening, auto brightness/whiteness, and image merge.
- For environments using VRS or image controls connectivity, now you have more options than ever.
- Enjoy new features including five ultrasonic multi-feed detection zones, four feeder settings, Dynamic Flow Technology, controlled stacking, and more.

Cost savings

- Benefit from reduced service contract costs - save up to 42% (compared to cost of plan for older scanners).
- Go a step further by purchasing a multi-year

extended warranty. Save up to 50% from old to new contract pricing - and protection from annual price increases plus built-in discounts.

Your old scanner is worth money

- Trade it in. Every dollar gets you closer to new technology and greater productivity.
- We'll responsibly recycle your old scanner to help protect the environment.

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Service savings and trade-in value pays for your new scanner in no time.

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2. Eligible Claimants purchasing a new Kodak Alaris scanner and, at the same time, trading-in a pre-owned and unencumbered Kodak Alaris, Fujitsu, Canon, HP, Avision or Epson - branded scanners that (Trade-in) for recycling by a third party may submit a claim for the Trade-in Value (Eligible Purchase).
3. Only purchases of new (not pre-owned) Scanners are eligible. Kodak Alaris Scanners sourced from any source other than the Promoter directly (including 'grey', 'parallel' or 'direct' imports) are not Eligible Purchases.
4. Once Claimant has sent all relevant details, Promoter will organise the pick up of the customer trade in unit. Once received back to Promoter, Claimant will be paid via discount.
5. Promoter will pay the cost of collecting the Trade-in from the Eligible Claimant's location.

*Terms and conditions apply

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Is There Value in Unstructured Data?

By Larry Alton

One of the biggest challenges for modern businesses isn't being able to collect data, but finding a way to organize it systematically and using the data that piles up. Learning how to interpret random data points and unstructured information often proves to be more than some companies can handle, but it doesn't have to be.

"Increasing the volume of quality content being fed into big data analytics tools dramatically increases the value of the output - whether it's improved decision-making or better product design, risk reduction, and enhanced customer experience," Scott Mackey writes for Adlib Software, a global leader in files analytics and data enrichment solutions.

"To realize these benefits, however, organizations must develop the capability to process massive storehouses of unstructured data into a format that big data analytics tools can work with."

Unstructured data, also known as "dark data," poses a potential risk on multiple fronts. For starters, it represents a huge missed opportunity in terms of information that could be used to benefit the company's bottom line.

But the issue goes much deeper than that. In an age when data needs to be encrypted and properly stored, unstructured data is often extremely vulnerable to getting hacked or stolen.

"When data isn't used, there is a tendency for people to forget its content, purpose or even its existence," data expert John Spacey explains. "There is a further tendency for such data to go unmanaged and be more vulnerable to security risks, such as unauthorized access that may leak trade secrets and other proprietary knowledge."

Unstructured data is also resource-intensive and expensive to maintain. It can divert attention from the structured data that the firm needs to stay focused on.

The question is, how do you find value in something that appears so useless? In order to identify the true value in unstructured data, you need a plan of attack. The following tips should help you achieve some positive movement in this endeavor.

The question is, how do you find value in something that appears so useless?

1. Get everyone on the same page.

The first step is to ensure everyone is on the same page. Specifically, gatekeepers and decision-makers within the firm must see the importance of tapping into unstructured data so it can be used for practical purposes.

2. Figure out where unstructured data is coming from.

Where is your unstructured data coming from? In other words, what's the point of ingestion? It might be your website, social media profiles, system log files, healthcare information, financial data, CRM outputs, or a mobile app. If you don't nail the point of entry, it will be nearly impossible to do anything else with the material.



3. Categorize ASAP.

The best time to apply structure to unstructured data is at the point of ingestion. Once you've figured out when and where the information comes from, you may implement systems that will filter and channel the data.

4. Eliminate the waste.

Although a lot of unstructured data can be valuable, there's likely to be plenty that's worthless for your organization. Instead of keeping that content around, go ahead and eliminate the waste. This will reduce your overhead and prevent energy from being expended on activities that don't matter.

5. Combine unstructured and structured data.

Perhaps the best way to use unstructured data is to place it alongside appropriate structured data. When the two play nicely together, they can generate some surprisingly powerful and deep insights that neither would provide in isolation.

"While structured data is often easier to process and analyze, it can only reveal overall trends - not the reason behind those changes," explains Eric Pendleton, a project training manager at a text analytics firm.

"Unstructured data can reveal a deep understanding of the why behind the data; it's just more difficult to track and may be dismissed by skeptical executives who reason that 'it's just what a few people say.'"

By combining the "what" (structured data) with the "how" and "why" (unstructured data), you will gain a much more complete and cohesive picture of reality ... particularly as it pertains to customer-facing endeavours.

Collecting data for the sake of amassing information is pointless. If you aren't careful, you'll end up responsible for massive repositories of information, with nothing to show for it.

But if you develop a strategy for handling unstructured data, you may flip the script and make the most of the information-centric environment your business finds itself having to inhabit.

Larry Alton (LarryAlton.com) is a freelance journalist covering issues related to technology and data security. This post originally appeared on the ISACA blog.

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ROBOTIC PROCESS AUTOMATION

RPA Takes Centre Stage in 2019

Excitement about the potential for robotic process automation (RPA) to transform the workplace shows no signs of subsiding in 2019. What are the significant RPA trends and developments that can be expected this year? IDM asked Rob Mills, Vice President, Australia & New Zealand at Blue Prism for his perspective. Mills has a lengthy background in enterprise content, collaboration and information governance, and is looking forward to the arrival of true intelligent automation, what Blue Prism calls connected-RPA.

IDM: What is RPA and why are large organisations globally embracing it?

RM: Blue Prism coined the term Robotic Process Automation (RPA) in 2013 to describe the automation of manual processes by digital workers or software robots. These digital workers mimic the actions of real-life employees by capturing, querying and interpreting data, triggering responses and communicating with other digital systems. Put simply, it's a digital workforce that offers assistance, opinions and insight to customers, staff and other digital systems. RPA can be used for relatively mundane data entry tasks but it is increasingly being used for more sophisticated processes that would previously have required the perception and judgement of humans when cognitive capabilities are added. This moves us into the world of 'intelligent automation' which I'll explore in more detail later.

In terms of why it is being embraced - it is more a question of 'why not?'. Naturally, deploying RPA can be used for efficiency cost savings, but it can also create considerable value. It drives more accurate, faster and responsible processes which in turn lift the customer experience, aid governance and regulatory process and can even open up additional revenue streams.

Today, IT departments often spend most of their budget on maintaining and updating processes and systems, rather than focusing on new initiatives. Blue Prism gives enterprises greater operational agility by providing an intelligent digital workforce capable of self-learning and continuous improvement, empowering users to automate billions of transactions while returning hundreds of millions of hours of work back into the business.

IDM: Analysts agree that the market is in hypergrowth mode and that this will continue for years. What is driving this?

RM: It is growing exponentially as RPA addresses many of the business processes that have remained outside the scope of the large transformation programs of works that organisations undertake to improve their core platforms and services. When it comes to a business case, RPA offers value across the entire enterprise. For the CEO it delivers increased margins while reducing costs, allowing the business to operate more efficiently; for the COO it's



Rob Mills

Vice President, Australia & New Zealand, Blue Prism

productivity and better services; for the CIO it's providing the business with a flexible and resilient digital workforce that they can self-serve; the CFO is attracted by reduced operating costs and improved compliance and security; for the CDOs it's rapid prototyping and ability to leverage and deploy complimentary technologies such as OCR, Natural Language Processing and cognitive services; for the CMO and CCO it delivers a better customer experience by meeting service and response time expectations. Last but not least, it removes the boring and tedious tasks for many employees and allows them to focus on higher value work.

IDM: Since opening its first ANZ office in Sydney in April 2017, Blue Prism has expanded its client list to include many of the largest financial institutions and telco brands in Australia and New Zealand, as well as the Federal Government. What are some examples of RPA in action?

RM: The range of processes that ANZ organisations are using RPA for is extremely broad. Taking just one sector as an example, you'll see financial institutions use it for a range of things like the processing of mortgages, loan applications, transfer of funds, customer onboarding and switches of investments. Many of these processes can also be quite complex, with multiple process paths reflecting product rules and compliance regulations and touch dozens of business applications and the impact of an RPA deployment can be nothing short of transformational. For example, one large bank we work with has been able to reduce the time it takes to open a transaction account from six days to just 10 minutes. This time reduction isn't just due to efficiency - it was also down to governance issues which previously meant two different teams had to be involved. Of particular interest to IDM readers is the fact that capture technologies to classify and OCR documents is on the rise and we expect to see a significant upswing in the automation of processes involving unstructured documentation.

IDM: What is intelligent automation and how is this different to robotic process automation for RPA to broaden its applicability to business process that require reading and understanding documents

RM: Intelligent automation is 'next level' RPA and where its future lies. Essentially, cognitive capabilities like sentiment analysis, emotional AI, pattern learning, computer vision, optical character recognition (OCR); visual perception and collaboration can now enable a digital workforce to carry out more complex and sophisticated tasks.

For example, a digital worker may use OCR technology to understand a document and the data it contains, and then automatically update the appropriate business applications

(Continued over)

Smarter Digital Workers to Handle Unstructured Content

By **Bill Galusha, ABBYY**

In today's world, enterprise organisations increasingly rely on digital automation to deliver the greatest level of efficiency and customer experience. A catalyst to an organizations digital transformation journey has been robotic process automation (RPA), creating a new class of digital workers that replace or augmented many office employee jobs increasing efficiency, scale, and speed at which work can be done.

Despite the push towards more digitization of processes, organizations are still faced with a daunting challenge when it comes to processes involving content, information that is not always well structured and often takes a team of employees to manage. Virtually every industry and business department still rely heavily on documents in digital or printed format coming from all different communication channels of input – email, fax, mobile, and scanners. These document processes put an enormous strain on operations and their employees as they are required to interpret the information and process it accordingly resulting in manually extracting relevant data from the document and putting into a system.

Imagine if Blue Prism's digital workers (software robots) could recognize, read, and understand a document regardless if it were a form or an unstructured document in digital or image format? The reality is you don't have to imagine this, it is reality. By leveraging the right visual perception and insight skills, a robot can fully automate a process involving documents using intelligent capture technologies – OCR and machine learning – to digitize content, classify documents, extract data, and validate information with little human involvement.

Vision perception and insight skills are central to content

"intelligence" where the focus is on applying AI specifically to documents that:

- Easily automates and analyze content-centric processes involving images, documents, texts, and communications.
- Analyze and learn from content to make more informed decisions.
- Incorporate machine learning to perpetually improve and streamline business processes.
- Measure, sustain, and adapt digitized content processes over time.

By providing Blue Prism digital workers with the right skills, it opens a new world to automating of content related processes.

There is unstructured content in business areas like finance and accounting (invoices, purchase orders, sales orders); logistics (customs declarations, proof of delivery, bills of lading); financial services (mortgage lending, opening accounts, trade confirmation); and insurance (claims, policy administration, opening accounts).

The key to scaling the solution and using across many business areas, it needs to adapt to the different document types and variations. By using machine learning, the system does not rely on a fixed template rather it learns by analyzing the document layout and text, along with capturing user input during the process.

This allows for the system to get smarter and more accurate over time as it encounters new document types and variations. This makes it possible to automate document processing like invoices or purchase orders where there's potentially thousands of variations of these documents coming from many regions and in different languages.

As organizations expand their use of RPA and look to the next level of intelligent automation, an effective digital worker is going to need the skills to visually look at a document, determine what is, extract the relevant data, and process it. Today, that solution exist.

Learn more about the ABBYY solutions by visiting <https://digitalexchange.blueprism.com/dx/>

and communicate robot to robot, robot to person or robot to customer, as appropriate. Natural Language Processing (NLP) along with sentiment and entity analysis, language translation and computer vision will also allow businesses to process documents with unstructured data and images and we see this is a significant opportunity for future applications.

IDM: Do you expect we will see a standard emerge in robotics process automation in 2019?

RM: We certainly hope so. As it is a relatively new technology category, it can be hard for customers to differentiate between vendors. From a marketing perspective the messaging is very similar, but not all of the vendors have the enterprise grade technology and the experience to deliver. Unfortunately, this can lead to businesses making an expensive mistake and purchasing technology that isn't fit for current or future purpose. Blue Prism is a founding member of the IEEE Standard Association P2755 working group and in September 2017 the IEEE published a Guide to Terms and Concepts in Intelligent Process Automation. This basically defines two types of capabilities;

- Robotic Desktop Automation (RDA) – in which a human operator initiates a software robot to execute a predefined activity. This assisted automation utilises the credential of the human worker to access software applications.
- Robotic Process Automation (RPA) – this is autonomous execution of a defined process by a software robot using its own unique system credentials just as a human operator would. Generally, this is done in a server environment

on-premise or in the cloud. Unfortunately, the vast majority of organisations that are implementing what they believe is RPA are in fact, implementing RDA. The difference is vast. It would be akin to comparing a mobile phone Business Card Reader App with an enterprise Capture capability, so our advice to anyone considering an RPA solution is to do their due diligence – or work with a channel partner who has!

IDM: Why has Blue Prism announced Digital Exchange and what does this mean for adjacent technologies like AI, cognitive and disruptive technologies?

RM: The Digital Exchange is at the centre of our connected-RPA vision which aims to gives enterprises a game changing way of staying competitive and accelerating time to market for new services and products by easily accessing and exploiting leading-edge cloud, AI and cognitive capabilities.

The equivalent of an Appstore for enterprise automation, it's a place where our customers, partners, technology alliance partners and development can come together to share and inform – effectively fast-tracking the Blue Prism experience, shortening design cycles and providing insight to the art of the possible. Many of the downloadable assets are focused on AI and cognitive technologies such as OCR, text analytics and computer vision. These assets don't need any coding or scripting. It is simply drag and drop access to intelligent automation (IA), machine learning, cognitive and disruptive technologies from companies our clients know and trust—like Appian, ABBYY, Google, IBM and more. Consequently, we expect to reduce the knowledge gap and fast track the application of these adjacent technologies.



TOTAL:
14,622
INV No

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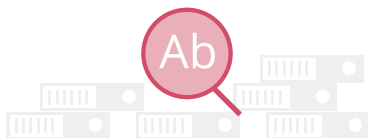
Take the data. Leave the paper.

Capture data from any documents, from structured forms and surveys to unstructured text-heavy papers.



Mobile Capture

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



Document Archiving

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



Accounts Payable Automation

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



Mailroom Automation

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



Document Classification

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



Forms Processing

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

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



Accelerating digital Transformation

Australia needs more Compliance experts

Demand for Risk and Compliance experts in Australia has risen sharply over the last twelve months, and will continue to increase in the year ahead, according to an industry study conducted by TAS, a solution provider for Australia's financial services sector. The study found that more than 60 per cent of executives surveyed are seeking to employ as many as 5 additional resources to focus purely on Risk and Compliance management in the year ahead. When compared to the previous year's Index, this is an increase of close to 20%.

Research conducted by SEEK also found the number of job advertisements for Risk and Compliance specialists has jumped by nearly 50 per cent over the past year. Currently 13.5 per cent of all Banking and Finance roles on SEEK are in the areas of Risk and Compliance. Close to three quarter of surveyed executives reporting increased visibility of compliance across the organisation. This is significantly up by almost 20 per cent when compared to 18 months ago.

Shane Baker, CEO of TAS said, "According to the report, Australian executives are taking a top-down approach to creating positive change in their organisations towards compliance. Leaders are taking the right steps to ensure greater transparency moving forward with increased commitment to specialist resources as well as the prioritisation of compliance at a Board level. This shows executive ownership at the most senior level to meeting regulatory requirements which is critical when creating a company-wide, robust and effective compliance culture."

However, despite the progression made to-date, the Index also suggests that there are still many challenges that organisations face when it comes to compliance. The top three challenges are: resource constraints (42 per cent), time (35 per cent) and capability (23 per cent). Yet, against these findings, companies appear to be slow on the uptake of innovative partnerships to help overcome these challenges with less than a quarter of organisations activity partnering with RegTechs (23 per cent), three percent actively pursuing future partnership with RegTechs, and a third considering partnerships with RegTechs (32 per cent).

Regulatory technology, also known as a "RegTech" is a new field within the financial services industry that utilizes information technology to enhance regulatory processes. It puts a particular emphasis on regulatory monitoring, reporting and compliance.

Mr Baker concludes, "It is no surprise that given what the sector has been through recently, there is nervousness around implementing relatively new and untested technology, which may be impacting organisations' decisions to partner with RegTechs."

The full report can be downloaded at <http://bit.ly/TASComplianceReport>

Cbus transforms finance with Valtatech

One of Australia's largest super funds, Cbus Super, has chosen financial process automation experts, Valta Technology Group, to implement, integrate and manage a Source to Pay solution to drive automation across its accounts payable, financial and procurement process functions.

Cbus provides superannuation and income stream accounts to more than 780,000 members and manages over \$A48 billion worth of infrastructure and property assets in Australia and overseas. It has integrated Valtatech's new Source to Pay (S2P) technology platform to enable greater efficiency across the super fund's back-office functions.

Cbus and Valtatech's partnership, which began in January 2018, has now been expanded into a full source to pay managed service.

Valtatech's new end to end S2P platform provides a complete ecosystem to improve Cbus's ability to leverage its procurement outcomes for the benefit of its members. Reducing costs, risks and improving value delivery across the fund; while providing the visibility and insights Cbus requires to improve risk mitigation, due diligence processes and governance.

S2P and P2P technology and process expert, Jussi Karjalainen, who is Founder and Managing Partner of Valtatech, says: "Alongside our S2P solution and managed service, our partnership with Cbus ensures their team can leverage the best people, processes and technology to transform their finance and procurement functions. Valtatech is extremely proud to partner with Cbus and look forward implementing a solution to build Cbus's procurement capability further."

CBUS's new S2P technology platform includes:

- A full procure-to-pay system including financial governance/approval steps
- A contract management repository to help speed up contract negotiations and link contracts with the full Source to pay value chain
- Simplified options for tactical contracting, to ensure contract terms are adhered to and that the business can move at speed
- A systemised supplier relationship management framework to better track and measure supplier performance
- Harnessing data to enhance fund's ability to build insights to better inform budgeting, financial performance, procurement activities and decisions
- Integration with Cbus' Peoplesoft ERP system, while providing improved insight and controls across sourcing, contract management, purchasing, accounts payable automation, analytics and supplier relationship management, supplier catalogue enablement and electronic invoicing (e-invoicing).

Only 5% Of Enterprises Have Implemented Modern Data Sharing at Scale

A new study reveals significant gaps between what enterprises want to implement and what they have actually accomplished with modern data sharing and advanced analytics. In essence, only a small percentage of enterprises surveyed are truly data-driven.

The Harvard Business Review Analytic Services: "An Inflection Point for the Data-Driven Enterprise" report was commissioned by Snowflake Computing, a data warehouse built for the cloud, and MicroStrategy Incorporated, a leading worldwide provider of enterprise analytics and mobility software.

Only five percent of survey respondents believe that their organisations are very effective at implementing modern data sharing, while 67 percent want to move towards that approach.

With modern data sharing, data doesn't physically move. Instead, data is shared in a secure and governed way in real time by easily creating access to read-only copies of the data between any combination of organisations consisting of 'data providers' and 'data consumers'.

This creates unlimited opportunities for organisations to integrate shared data with their own data, giving them a level of insight previously unavailable to them.

Organisations that use traditional methods endure high costs, lengthy delays and avoidable risks only to share static copies of stale data. This limits how and with whom they can share data:

- 29% share data within functional groups or business units
- 21% share data across business units within an organisation
- 15% share data externally with key vendors/suppliers
- 14% share data externally with partners

"While all the industries surveyed could profit from advanced data analytics, retail/CPG stands out as an industry that could reap huge benefits by implementing modern data sharing," Snowflake CEO, Bob Muglia, said.

Harvard Business Review Analytic Services surveyed 729 global business leaders across industries for the report, which found that across categories, only five per cent of enterprises were truly data-driven. Additionally, retail/CPG had the lowest overall score for Digital Data Analytics Maturity.

Download the full report at <https://www.snowflake.com/resource/an-inflection-point-for-the-data-driven-enterprise>

Accelerating digital Transformation

Why workflow automation is a critical part of competitive advantage

In the digital transformation era, most companies are turning their paper-based processes into digitalised workflows. This saves time and reduces the potential for errors. Automating these workflows is an even more powerful way for businesses to work more productively and free up time for innovation to compete more effectively, according to Upstream, the solution provider and Fuji Xerox Australia subsidiary.

Scott Crosby, CEO, Upstream, said, "Automating workflows frees up employees from manual, repetitive tasks. It reduces the risk of human error and lets people focus on contributing to the success of the business. It also means important tasks can't be forgotten or left incomplete."

Workflow automation can be applied throughout the organisation to streamline processes and deliver efficiencies. For example, accounts payable automation includes capturing and extracting key data from invoices, matching purchase orders with invoices, managing approvals, integrating all details with the enterprise resource management (ERP) system, and finalising payments.

Upstream has identified six key ways that workflow automation contributes to competitive advantage:

- 1. Save time.** When staff members are focused on core activities and innovation instead of repetitive, administrative tasks, the business benefits from their combined effort and brainpower.
- 2. Reduce errors.** When people have to key in information, there is a risk of typos and other errors. Capture extraction tools such as optical character recognition (OCR) and smart software, and automated workflows reduce the risk of these errors creeping in.
- 3. Leverage discounts.** Most suppliers offer discounts for on-time payments. Automating workflows for processes, such as accounts payable, means businesses will never miss a payment or pay late, so they can take advantage of on-time discounts.
- 4. Avoid duplication.** Some suppliers send invoices by mail and email. Processing them manually means there can be confusion as to whether invoices have been paid. This can lead to accidental non-payment or double payments, each of which has negative consequences and distracts employees from more valuable activities, and reduce penalty fees.
- 5. Track information.** Automated workflows include reporting functionality and version control that lets businesses see important data such as bottlenecks in the process, potential for further savings, and key performance metrics.
- 6. Work efficiently.** Automated workflows mean people are automatically notified when they need to step into a process, such as to provide approvals. Automated reminders mean people know what's required, which mitigates the risk they'll forget or overlook the action.

Research has shown that highly automated companies are six times more likely to see revenue growth of more than 15 per cent compared to companies with low automation. (*)

Scott Crosby said, "Businesses that haven't yet started to automate processes can start small and see the results before rolling out automation across the organisation. Workflow automation should be considered a high priority for any organisation looking to compete more effectively."





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Tackling social media compliance at Taranaki Regional Council

A chance encounter at a social media conference solved Taranaki Regional Council's social media records compliance issues and now saves the communications team hours of work every week. Taranaki's Digital Communications Adviser first encountered Brolly at a conference focusing on social media for Government.

'Brolly appealed to me immediately', she said. Based on the presentation delivered by Brolly Sales Manager, Damian Martina, it was clear that the social media record management compliance requirements of Taranaki Regional Council were going to be covered.

Prior to the implementation of Brolly, tasks for the team involved copying and pasting. Taranaki Regional Council is not alone in this approach, and they shared the frustrations of any New Zealand local authority, trying to capture, store and manage communication on social media channels.

On Facebook, for example, conversations are ongoing and in constant flux. A Facebook page admin or editor can change the content of a post, and citizens can reply or direct message, even long after the initial conversation. More and more citizens choose to communicate with Council using social media.

Taranaki also has private messages enabled through Facebook, and this adds another level of complexity in records management. The volume of conversations in this medium is constantly increasing. When using private messaging, people often share information that is more 'personal' because the conversation is not on public display.

Capturing and managing the information is a mammoth task - some would say it's impossible to keep up with all the changes. Brolly was developed in Australia in response to the growing use of social media for citizen conversations. The solutions that Brolly provides for Australian councils and shires translate seamlessly into the New Zealand territorial authority experience.

Before implementing Brolly, the product needed to meet Taranaki Regional Council's record keeping requirements. The New Zealand Public Records Act 2005 sets out responsibilities for creation, classification, maintenance, disposal and archiving of records, including social media.

Council's Documents Management Officer was a key decision maker in the adoption of Brolly for Taranaki.

She was delighted to find that the team at Brolly were able to answer all her questions about compliance and standards - sometimes even before she asked them.

Accelerating digital Transformation

The Brolly team's extensive experience with the government sector means they are across public records requirements and have built compliance into the product. As standards are reviewed Brolly is updated, ensuring continued compliance in a changing digital communication landscape.

One important concern was related to ownership and access. As the Documents Management Officer noted, 'We need to have access to the digital files and to be able to store them in our systems. The PDF, JSON and HTML export functionality mean that the data is in our control, and as secure as our systems. We didn't want to face the risk of data leaks or vulnerabilities that might come with some cloud-based systems.'

Capture on the map for Australian Geography Competition

In the GPS era, it's been estimated that only 1 in 3 Young People Can Read a Road Map. Make that a topographical map and you can be certain the percentage would be much much lower. No such problem for competitors in the annual Australian Geography Competition, where the map reading skills and geographical knowledge of Australia's best and brightest High School students are tested in a challenging multiple choice test.

A joint initiative of the Royal Geographical Society of Queensland and the Australian Geography Teachers' Association, the competition has been run annually since 1995. A scanning and OCR solution from EzeScan helps a team of volunteers compile results from over 70,000 entrants from over 700 schools, with winners provided an all expense paid trip to compete at the annual International Geography Olympiad, held this year in Quebec City, Canada

The Competition is open to students studying geography (or an integrated social science that includes geography) in all Years of secondary school.

Each year the competition mails out up to 90,000 exam question and answer sheets to schools nationwide.

Competition Coordinator Bernard Fitzpatrick explains that teachers still prefer having the paper materials for exams "The Competition is self-funding and we rely heavily on members and volunteers to manage the judging process so the EzeScan solution is assisting us greatly.

Each scoresheet is scanned to multi-page TIFF on a Canon ImageFormula BR9050C with Optical Mark Recognition done by the EzeScan software. Each school has a unique identifier code printed on the answer sheet. It takes few days with the scanner running 24/7 to process all the scoresheets and extract the results to a .csv file using four on-site PCs.

"EzeScan assisted us greatly by programming a solution to and design templates for better pattern recognition," said Fitzpatrick

"One of the advantages of running a competition for bright students is they grow up to be university students with Python programming skills. One of our winners helped write code to data analysis of the scanned data in half the time of our previous process ranking all the classes from the individual Year levels and Schools against each other and identifying winners for each level."

Outstanding students at each age level win prizes which include books, special certificates, and medals depending on the age level.



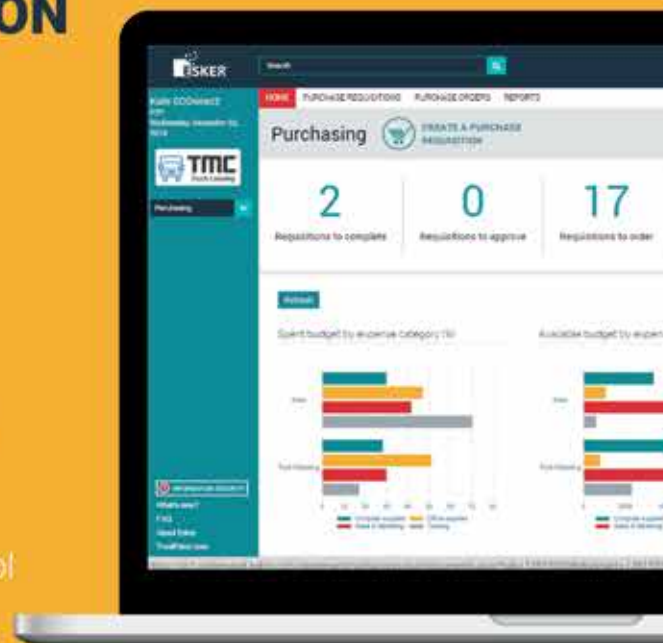
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ACCOUNTS PAYABLE

- Automatic invoice matching
- Accurate and rapid financial closing procedures
- Audit trail and KPI management
- Vendor portal for easy communication

PURCHASING

- Centralised application to raise purchase requisitions
- Supplier catalogue management
- Quote to purchase requisition conversion
- Optimises indirect spend requests with budget control



RECEIVE & SCAN



EXTRACT



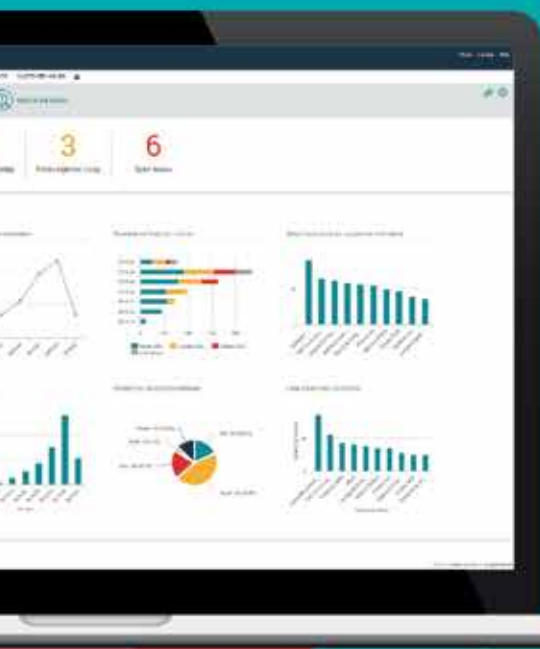
VERIFY & MANAGE



ANALYTICS
& AUDIT TRAIL



SUPPLIER
PORTAL



ORDER-TO-CASH AUTOMATION

ACCOUNTS RECEIVABLE

- Automates the delivery of invoices (all formats)
- Reduce receivable and DSO rates
- Get paid faster
- E-invoices compliance (PEPPOL format)

SALES ORDER PROCESSING

- Process orders in all kinds of format
- Issue management workflow
- Respond to inquiries faster
- Measure efficiency and have accurate forecast

Overcoming Digital Business Roadblocks

By Katie Costello, Gartner

Becoming a digital business is not as simple as buying the latest technology. It requires a fundamental shift in an organisation's culture and worldview, right through to its core systems. To pave the way, CIOs and IT leaders must take on the challenging task of overcoming dysfunctional corporate behaviour and practices.

Marcus Bloesch, research vice president at Gartner, has identified several of these corporate barriers and explored how they play out in a given organization. He found that the root cause of many barriers to digital business is lack of partnership.

A successful digital organization requires a culture of collaboration, creativity and experimentation. But what happens when people aren't willing to share or collaborate across functions?

"Politics and misunderstandings often block or limit potential partnerships on the way to digital," says Bloesch.

"This is why CIOs and IT leaders must focus on the interests of their people and create a compelling vision for the new world that digital innovation will bring about."

A good starting point is a three-way partnership between the executives leading the organization's digital initiative, line of business and IT to scale and communicate new ideas.

Avoid getting caught in the digital hype

Businesses say they want to innovate with digital technology, but they don't always have the necessary imagination, ability and resources. Many leaders get caught up in the digital business hype and try to move forward prior to being ready.

"Iterative, experimental and learning-oriented processes - such as design thinking and lean startup - are needed to put people at the centre and innovate around them."

The business must first build its readiness to actually go digital.

"Executives must build the ability to innovate and develop the people, skills and competencies needed, in conjunction with the IT organization. Only then is it possible to innovate with digital," Bloesch says.

Digital business isn't possible without the right people or processes. As a result, there is an increased need for individuals who are creative, can manage continuous change and have skills associated with the technology itself, for example, the Internet of Things (IoT) and artificial intelligence (AI).



"Putting these competencies together brings about new services and ways of working in the digital world," Bloesch says.

Traditionally structured processes simply will not enable a digital business to develop.

"Iterative, experimental and learning-oriented processes - such as design thinking and lean startup - are needed to put people at the centre and innovate around them," Bloesch explains.

Enhance your digital maturity to make change a little easier

A simple way of understanding digital is that it's about transforming your business and operating models with technology. Naturally, this often involves a large-scale change.

"You need to develop platforms, become more modular and service oriented, and invest in skills - essentially enhancing your digital maturity," Bloesch says.

Effective change is almost impossible without organization wide collaboration, cooperation and consensus. CIOs and IT leaders must drive strong relationships with the business responsible for their organization's digital strategy by promoting a partnership between the two to dissolve the barriers to becoming a true digital business.

When Vision meets the Legacy Hurdle

When asked about the biggest barriers to digital transformation in 2019, nearly a third of organizations surveyed by consulting firm Infosys cited insufficient budget and 22% cited the inability to experiment quickly.

'Legacy systems' still present the single biggest barrier at 41 percent of those surveyed. Lack of change management capabilities and relevant skills are also seen as major hurdles.

Those were among the findings of the Infosys Digital Radar, based on an online survey of more than 1,000 global C-level and other senior executives conducted in November 2018, as well as phone interviews with practitioners and subject matter experts. The study found that when it comes to digital transformation, organizations can be grouped into three clusters based on their progress: visionaries, explorers, and watchers. The firm defines visionaries as organizations that understand the potential of digital to completely transform business; explorers as those that commit to digital programs driven by the need to enhance customer experience; and watchers as those that see digital through the prism of efficiency.

Infosys identified 22 key digital initiatives and surveyed where companies stood on implementing each one. The 22 digital initiative were also categorized under four big buckets: foun-

ation initiatives - implemented to modernize legacy systems; mainstay initiatives - focused on core digital transformation elements such as automation and AI; customer initiatives - focused on improving the customer experience; and forefront initiatives - focused on harnessing cutting-edge technologies, such as augmented and virtual reality, drones and blockchain.

This research found that as companies advance along the digital transformation journey, they tend to focus on different buckets. Watchers concentrate on scaling up foundation initiatives. Explorers focus on a broader range of initiatives including mainstay and customer - yet are sometimes held back by a lack of progress in scaling up foundation initiatives. And visionaries bring many initiatives to scale alongside the foundation, mainstay and customer categories. Visionaries are also the only businesses making substantial progress on scaling up forefront initiatives.

The survey revealed significant differences in digital maturity by industry. The highest maturity levels were found in technology, manufacturing, telco and financial services sectors. While industries such as consumer goods, logistics and healthcare ranked near the bottom regarding their digital transformation progress. Compared to other industries, retail is in the middle of the pack, with many legacy retailers not having made much headway.

The full report, is at <http://www.infosys.com/digital-radar>

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Protecting the ‘right to be forgotten’ in the age of blockchain

By Raja Jurdak, Research Group Leader,
Distributed Sensing Systems @ Data61, CSIRO

There’s been a lot of hype about blockchain over the past year. Although best known as the technology that underpins Bitcoin, blockchain is starting to disrupt other industries, from supply chains to energy trading.

One of the key selling points of blockchain is that once data is added to the chain, it can’t be changed or removed. This makes blockchain trustworthy. But this same immutability makes blockchain problematic in a world where privacy laws require companies to delete your data from databases once it has served its purpose. This is known in some jurisdictions as the “right to be forgotten”. We have designed a blockchain in which users can remove their data from the database without violating blockchain’s consistency. There is currently a growing market of Internet of Things devices, from smart homes and self-driving cars to voice assistants and smart energy meters. These devices continuously collect digital biographies of our lives. As this data is increasingly being stored on blockchains, the tension between blockchain and the right to be forgotten will only increase. Our tool could help.

How blockchain works

At its core, blockchain is a database that is jointly managed by a distributed set of participants. Whenever new data is added to the database, all the participants must agree to verify it. In this way, blockchain removes the need for a third-party, such as a bank, to verify transactions.

The blockchain ledger is organised into blocks, where each block is linked to the previous block through cryptographic hash functions. These functions create a short code based on the content of the previous block, and it is not possible to guess this code without trying all possible codes. Chaining the blocks in this manner ensures that the data stored in them cannot be altered, as any changes made would break the blockchain consistency.

This makes blockchains immutable. It also makes blockchain data easy to trace and audit, particularly for large networks like the Internet of Things. These features are highly attractive for organisations operating across organisational boundaries, and in environments where participants may not fully trust each other.

Regulatory challenges

The European Union’s recent General Data Protection Regulation (GDPR) is a significant piece of legislation that is at odds with a digital economy underpinned by blockchain. The GDPR requires companies that hold people’s data to erase that data once the original purpose they needed it for is complete. That means that people must be able to remove their data from third party databases after a certain period of time.

Blockchain – being unchangeable – presents an obstacle to exercising that right. Let’s say you live in smart home that uses sensor data to monitor your home security. You have a home insurance policy and, in order to receive lower premiums, you allow your smoke alarm and security sensor data to be recorded on a blockchain.

The blockchain data can be accessed by the police, the fire department and the insurance company so they can audit any

smoke alarm or security events. Once your insurance period has ended, you should be able to remove your security data from the blockchain to enhance your privacy.

If you left your data on the blockchain indefinitely, that would increase the risk of your data being identified as yours, and your activities being tracked by any entity with access to the blockchain.

A blockchain participant typically uses one or more public keys as its identities. The transactions in blockchain are stored anonymously, as there is no direct link between the public keys and the real participant identity. But a breach in identity in any of the transactions, for instance by linking the transaction content to other known data about the user, leads to all interactions of the users’ devices, stored in blockchain, to be tracked by all blockchain participants.

Remove data without breaking the chain

So being able to the remove data from the blockchain without “breaking the chain” would be beneficial for user privacy. It would also be beneficial to save storage space on the servers that store blockchain ledgers.

But currently, removing data from a blockchain is not possible without breaking the blockchain’s consistency.

We have come up with a solution that makes it possible to remove your detailed transaction data from a blockchain database, without removing the auditable trace that the transaction took place.

As described in our peer-reviewed publication, *Memory Optimised Flexible Blockchain* allows you to temporarily store, summarise, or completely remove your transactions from blockchain, while maintaining the blockchain’s consistency.

The remaining trace of the data (its hash) on the blockchain can still be used in the future, in case disputes over what happened arise. For instance, if a home owner wanted to verify that a break-in took place at their house under a previous insurance policy, they could provide a private copy of the data with its associated hash. A legal authority could then compare the hash of the person’s data with the hash that is still stored on the shared blockchain and thereby validate the authenticity of the person’s claim.


This approach provides you with full administrative control of your blockchain-stored data. It makes it possible for you to remove or summarise this data, without sacrificing the ability to audit the data in the future.

Reclaiming privacy and control

It is important to note that our published approach can run atop any existing blockchain solution, and does not affect the blockchain consistency. The links among blocks through hash functions are preserved, even as specific blocks are removed or summarised from the chain. In other words, the link of any blockchain entry remains, but the bag containing some data can be cut loose.

In fact, as long as the removed content is stored privately outside of the blockchain, the data’s authenticity can be independently verified at a later time by comparing it against the hash in the blockchain. In this way, you can reclaim control of any previously shared data and exercise your right to be forgotten in the age of blockchain.

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Tips for Tackling your Next TRIM/RM/CM Upgrade

The EDRMS formerly known as TRIM/Records Manager has a long history as the record-keeping system of choice at all layers of Australian government. One of the consequences of Content Manager (CM), as it is now called under new owners Micro Focus, being so firmly entrenched is the perennial challenge of version upgrades. These can be magnified by the fact that an EDRMS is generally very tightly bound with other business systems and a key element of daily workflow, making the potential for change significant.

To get a better understanding of what an organisation must factor in when it comes time to bite the bullet and move up to the latest version of Microfocus CM 9.3, IDM asked principal consultant, Tony Chung, from Kapish, a Tier 1 Micro Focus Platinum Business Partner, and part of the Citadel Group, for his insights. Kapish provides services and support for all versions of Content Manager (previously known as TRIM and Records Manager) along with a range of software solutions and custom software development for clients around the world.

IDM: Organisations across Australia and New Zealand are at different stages in their upgrade path, what would you say are some of the major reasons they should at least be considering moving to 9.3?

TC: Organisations typically undertake upgrades of their Content Management System to maintain their support, integration with other line of business systems, and to leverage new features of the product. An upgrade can be undertaken to relaunch the implementation of the EDRMS, bringing a new interface and configuration for users.

Careful planning is important as Content Manager is generally the central repository for records (integrated with other systems) and heavily relied upon by users within organisations. In most situations, upgrading to the .3x release tends to provide the most stability, reducing the risk to the organisation.

IDM: Some don't upgrade their EDRMS for a long period of time. What are the oldest versions that you are seeing still in active use?

TC: Most organisations these days aim to upgrade their system every 1-2 years. We've worked with some organisations that are still on TRIM Captura (4.x), which integrated with Microsoft Office 95! Upgrading from these versions to the latest 9.3x version requires a two-step process, but doesn't involve any more effort from the customer.

IDM: How long does the average migration take?

TC: For small organisations, an upgrade process can run from 2-10 weeks from project commencement to project closure. Medium sized organisations 2-6 months and for larger customers with more complex integrations, projects can run from 6-12 months.

The varying duration for projects may be caused by



Tony Chung

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dependencies such as integrations, bug fixes, appetite for user acceptance testing and project resources.

With more and more customers transitioning to the cloud and subscribing to 'Content Manager as a Service', it is recommended that additional time is factored for. This time allows for security penetration and load testing, as well as changes to authentication of integrations, etc.

IDM: What are some important steps that can be taken to help the migration process go smoother and quicker and avoid business disruption?

TC: Careful planning and frequent communication with the customer directly influences the success of a project, especially upgrades and large migration projects.

With our experience of the product, understanding the current known issues and workarounds, we provide the customer with the facts and options available, which allows the customer to make informed decisions early on in the project, rather than later.

Working with different organisations will require different levels of engagement; it is important to set the expectations and roles and responsibilities early in the engagement, as well as adapting to changes where required during the journey.

IDM: Does an upgrade provide an opportunity to consider the option of CM as a Service or a cloud offering? Is this happening on a large scale?

TC: An upgrade definitely provides a prime opportunity to consider the option of moving Content Manager to a cloud offering; this would need to fit in with the organisation's IT strategy.

There are two ways to approach transitioning to the cloud. This can be delivered as part of one project, or as two separate projects. There are definitely efficiencies and cost savings to be gained by delivering as the one project.

At Kapish, in part with our parent company Citadel Group, we have recently upgraded two customers to Content Manager as a Service in the cloud, with another planned go live in April 2019. There are quite a few active projects underway with many in the pipeline.

There is definitely a shift in focus from customers, moving away from an on-premises model to a cloud offering. We believe we are seeing this shift for a few reasons, including: data security, application resiliency, and support expertise, all at a cost savings for an organisation.

IDM: Do many organisations still face an issue with user resistance and low adoption? How do you work to improve this?

TC: Many customers do face a small portion of their user base resisting adoption for the EDRMS. After understanding the reason for this, Kapish works with the customer to find a

solution to solve these problems, whether it is training, configuration, integration, product add-on, or introducing a process that works for their team.

As part of upgrades, performing a 'like for like' upgrade is typically recommended, however if there are some quick wins and features we can easily implement then it would make sense to introduce this as part of the change.

IDM: How do you address the Change Management issues in an upgrade?

TC: The key is to start Change Management early in the project, ideally during the initiation phase.

This allows more time for the organisation to communicate any changes to users and helps involve them during the process, such as user acceptance and overview sessions highlighting key improvements and changes.

Quick reference guides and e-learning videos have also been popular with customers during upgrades and almost essential for new implementations.

IDM: Do you recommend using a pilot to test functionality, identify further customisation required, identify problems and how to solve them, and test for staff acceptance?

TC: Changes to functionality and behaviour, which affects the end user experience should be performed in a lower environment to ensure that no issues arise, in particular with any

integrations or add-ons.

Introduction of a new business process should go through a pilot group to ensure it is well tested and appropriate for the business before planning the deployment into production.

Over the years, Kapish has developed a methodology for these business process deployments for customers, called the "Model Office Approach" where a process is defined and built; followed by testing and refinement before it is deployed into Production.

Through the process, the customer is trained and empowered to deliver these moving forward.

IDM: Do you have a checklist you provide organisations preparing for a change?

- Reach out to 3rd party vendors and check if the application is compatible with the upgraded version of Content Manager.
- Resource planning to ensure the project has the appropriate resources to be successfully delivered.
- Gather any user annoyances or gaps in functionality.
- Architecture planning (if on-premises) or consider transition to the Cloud.
- Get an insight of new functionality in the target version and note down for consideration.
- Licence Exchange (for older versions).



Unsure of who to speak to for your Content Manager upgrade?

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Thinking of Attaching Documents to your Line of Business Application? Think Again!

Document management doesn't have to feel like a slapdash, haphazard process. But often due to the sheer volume of work the average employee is tasked with, it's easier to find a rhythm in the chaos vs. taking the time to step back and implement a better system. And that can certainly include the impulse to slap a pdf alongside every line item as a way to feel like you're in control, covering all the bases in case of an internal audit or compliance check.

We feel pretty strongly about changing that mindset. You need to be smart about how you're organizing your records. Let's jump in.

How to Overwork Your System

The primary purpose of a database is to manage and process data quickly and efficiently. Since data carries a very small footprint, the resulting growth of a database is typically slow and very manageable.

However, once you start attaching documents, everything starts to grow exponentially. It doesn't take long for a database to expand into multiple gigabytes or even terabyte territory, which will eventually impact your server performance.

At some point, you'll need to increase Database RAM and Storage, or possibly require a complete server upgrade overhaul.

With this added burden, it's likely that your Line of Business application's performance will also be degraded, meaning you'll see a drastic increase in the amount time it takes to perform a system backup and recovery of your Line of Business application.

Here's the bottom line: if you can't adequately access and back up your databases, your organization is at a significant risk in terms of your disaster recovery strategies.

It's Complicated: Document Silos & Data Tracking

By attaching documents to individual Line of Business Applications, you are effectively creating individual silos that are only accessible through the application.

This means you're forced to manage individual systems, including creating and maintaining individual system backups, testing, and verification. This reduces your ability to access data as quickly as possible.

And what about version control? Are you looking at "Big Contract v8", when you should be reviewing the most current "Big Contract v9.2"? Things can get messy quickly when you're collaborating on a document with a team.

The ultimate software solution has centrally administered and managed document repository that stores every version of every document and shows you when changes were last made - and by whom.

Unlocking Employee Productivity

Attaching documents to an application is a limited filing solution, and it's typically a time-consuming effort for staff. You can easily unburden employees by finding a document imaging scanning approach that allows direct scanning to the file folder, as well as batch scanning and form recognition



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scanning, where appropriate.

Implementing workflow alongside this function helps even more since documents can automatically route to staff for review and approvals right from the system.

Additional features like electronic forms and DocuSign make managing all these moving parts a breeze and frees up employees to focus on the work they do rather than the tedious steps needed to document daily tasks.

Document Retention & Your Legal Liability

Most attachment features in Line of Business applications do not include the ability to manage future growth and perform document lifecycle management.

This means that your organization is keeping your documents for much longer than legally required. If legal action is taken against you, these documents could be subpoenaed by the courts, leaving your organization at risk.

An ideal solution includes the ability to set document retentions and manage future purging, as appropriate per regulatory guidelines. This mitigates your organization's legal risks too, as a document that has been legally purged cannot be recalled in court.

Plugging Those Security & Audit Holes

When you attach documents to a Line of Business application, the login access provided to the employee for that application is the only true security feature.

This leaves your organization at risk, because there may be certain kinds of documents that a user should be allowed to see, and others that should be viewable only to permission-enabled staff.

Open access will allow every user to see every attachment - regardless of how sensitive the material may be. Most attachment features also lack the ability to track access, deletion of documents, and other document functions.

A comprehensive document management system can protect access to the various types of information and provide your

organization with a detailed audit trail of who accessed which document – and what they might have done with it.

Time to Evolve to a New System. You in?

If your organization ever decides to migrate to a new application, the conversion will be significantly more difficult and expensive if you have a ton of attachments scattered throughout your Line of Business application. Rather than a smooth transition, you now have a complicated document conversion project to manage, which takes time, patience, and attention to details.

Aside from delaying the implementation and adoption time to getting a new system up and running, the drastically increased workload on IT and/or administrative staff is not to be understated here.

The Best Things in Life Aren't Free

Even when it's from a world-beloved entity like Google, "free" should be a big red flag. Organizations – especially small companies and nonprofits – are regularly turning Google Docs for their document management system. Yet for reasons of privacy, security, and true document management and retention mandates – Google Docs is not the best answer.

Google doesn't have built-in workflow outlets, so once data is in the system, it's stagnant and difficult to create security features around. Google doesn't have OCR capabilities to make your scanned documents easily searchable, and it won't

necessarily integrate with other existing programs.

Then there is the question of the integrity of the data you've stored. Is Google data-mining your files for content? Have you read all the fine print in that Terms & Conditions contract? Not to mention, Google Docs also experienced a widespread outage in November 2017, leaving many users feeling frustrated and helpless as they couldn't access their files. When is the next outage due – right before that huge client pitch? You need to know that your data is safe, easily retrievable, and accessible from anywhere – even when you're on the go.

In short, Your Line of Business applications already do a fantastic job of keeping track of structured data for your business. What a smart document management and workflow automation solution can provide is a way to ensure that your unstructured data is kept secure with the same level of scrutiny, while still being easily accessible to appropriate staff who need it to be available for your Line of Business applications.

This eliminates the hazards inherent in a simplistic attachment function in your Line of Business software, helps your staff to be more productive and organized, and ultimately keeps your organization on the pulse of a modern, up-to-technology document management and process workflow solution.

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Putting Continuous Active Learning (CAL) to the test

By Vishka Peiris, KordaMentha

No setting up training sets, no manually batching documents, real-time intelligence based on reviewer coding, sounds too good to be true right? We thought so too until we put Relativity's latest iteration of Technology Assisted Review (TAR), Continuous Active Learning (CAL), to the test.

What is CAL? As the name suggests CAL is an application embedded in Relativity designed to actively learn what documents are considered relevant in large unstructured data sets, based on reviewers' input.

The key advantage of CAL is the real-time intelligence our experts can derive from each coding decision made by a reviewer. From this intelligence our experts can identify if reviewers are in sync in terms of correctly identifying documents as Relevant or Not Relevant or if certain reviewers are coding documents inconsistently.

Real time performance monitoring of the review allows the experts to effectively address any issues with the review which in turn causes a drastic reduction in review time.

Once the reviewers have a firm understanding of relevance CAL becomes increasingly more effective at accurately identifying Relevant documents.

The mission

Our client received a notice from the Australian Competition and Consumer Commission (ACCC) to produce documentation in relation to certain insurance products as part of an inquiry into the insurance sector.

As with most inquiries from the regulators the scope of what was to be provided was extensive. This resulted in a substantial number of documents requiring review for relevance and privilege before being handed over to the regulator.

The mission - to provide the client with an end to end eDiscovery solution utilising CAL to minimise the financial impact caused by staff down time due to onerous document review, and to complete this process within the stringent time frames set by the regulator.

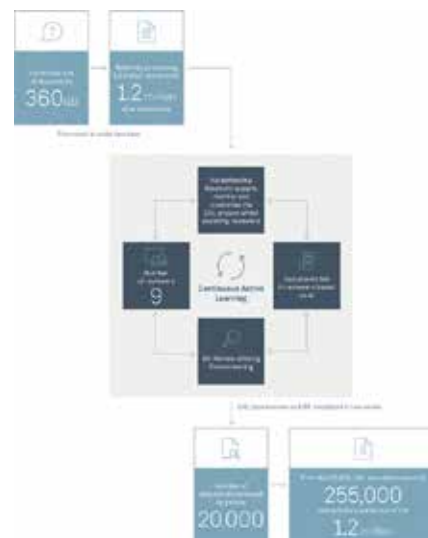
The total data set amounted to 360 GB which was processed using Relativity's processing engine in less than two days. The results of the processing left us and the client with a staggering 1.8 million documents (1.2 million after de-duplication) to review with less than two weeks to review and respond to the regulator.

The hard yards

Our client had 1.2 million documents to review with a team of nine reviewers and less than two weeks to complete their entire review, allow for QA and produce a final set of data to comply with the notice meant the client needed to utilise Relativity's analytics technology to complete the task.

To ensure that the analytics would work effectively our Relativity specialist's setup a custom CAL Project in Relativity. This provided the reviewers with documents to immediately start coding (marking documents as Relevant or Not Relevant).

Coding decisions are ingested by the CAL model which



becomes better at serving relevant documents to reviewers after each individual document is coded by a reviewer. This is the key differentiator between CAL and other TAR methods.

One week and two days into the review and our client had reviewed a total of 20,000 documents. At this point our experts reviewed the CAL results to ensure the CAL model was accurately identifying what was Relevant and what was Not Relevant.

More importantly the experts were able to compare the reviewers coding against the CAL results to confirm the reviewer's determination of relevance was aligned with the CAL results. These results were validated by performing an Elusion Test.

This test required a review of a random sample of documents based on how the CAL process had ranked them. It established for us and the client that the CAL model was correctly differentiating between what was relevant and not relevant.

The win

Before TAR, a review similar to this, with a team of nine reviewers would equate to at least 6 months' worth of review time and tens of thousands in cost to the client.

By effective utilisation of Relativity's CAL model, the client reviewed a total of just over 20,000 out of 1.2 million, this resulted in the system identifying 255,000 items as relevant out of the entire data set.

By utilising CAL we were able to efficiently assist the client with responding to the regulators stringent deadlines, avoiding costly review time and fines for non-compliance.

The content of this article is intended to provide a general guide to the subject matter. Specialist advice should be sought about your specific circumstances.



Vishka Peiris

Manager | Forensic Technology | KordaMentha



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RECORDS MANAGEMENT



9 Principles for Records Management Best Practices

By Raelene Bennett

Records management is rarely smooth sailing – it can often feel like you’re a tiny vessel in the middle of a sea of legislation. Just when you think you’re paddling in the right direction, a wave of legislation sends you reeling.

Yet records management compliance needn’t be this difficult. Enterprises make it harder for themselves by treating records management as an afterthought, instead of an intrinsic part of their everyday operations. In this article we’ll discuss the nine rules for records management best practices for implementation in your organisation.

Firstly, non-Compliance is NOT an option!

In a climate of tightening regulations, enterprises run an increasingly high risk of non-compliance. And, unfortunately, non-compliance can have some pretty serious consequences for businesses. Aside from the inevitable PR black eye and the potential risk of losing clients’ trust, your organisation could find itself faced with serious punitive measures.

In recent years we’ve seen some high profile examples of businesses being held accountable for failing to adopt records management best practices. Just last year, a Caltex franchisee was brought before Australia’s fair Work Ombudsman for failing to adhere to record-keeping laws, and the Sydney-based store was fined \$A100,000.

The franchisee, Aulion Pty Ltd, and its director were both fined after investigations revealed that information from the company’s accountant, bank and superannuation fund did not match figures provided to the ombudsman.

This might seem like an austere sanction but it’s worth remembering that the maximum fine for **each** breach currently stands at \$A1260 for an individual or \$A6300 for a corporation. After months or even years of shoddy record-keeping, those four figure sanctions can add up to a crippling fine.

Making records management best practices the guiding light of your operations will help mitigate the risk of non-compliance. Here are nine principles that will help you to stay compliant without compromising operational efficiency.

1) Prioritise Security and Privacy

One of the first priorities for any business intent on getting its house in order regarding record-keeping, is to ensure strict data security and privacy measures are in place. If security is lax, your data could be vulnerable to a breach. A data leak could have huge monetary repercussions whilst also creating a host of PR problems. It is incumbent upon businesses to safeguard their records and treat client data and information with the security that it deserves.

Without the right security measures in place, cybercriminals can not only access your records but also install malware into your systems which could capture your clientele’s vital data. Responding to security alerts should be considered an integral part of records management best practices.

Just recently, the Marriott hotel chain was subject to a data breach that resulted in details of 500 million guests being stolen, which could cost the company \$US200 million.

Your electronic document and records management system (eDRMS) should have strong inbuilt security features to keep information secure, with encryption of data in transit through a strong SSL connection.

Accessibility is another key component of security and privacy, which can be broken down into two parts; appropriate user access levels within an organisation and discoverability/usability of information to support business activities.

Organisations must ensure that sensitive, private or classified information can only be accessed by specific individuals with appropriate permissions.

Making information easy to find and use not only significantly impacts organisational efficiency, it is also one of the Digital Continuity Principles introduced by the National Archives of Australia to ensure digital information is discoverable, accessible and usable.

Processes and safeguards should also be in place to prevent any unauthorised destruction or deletion of registered physical and digital records as well as their associated metadata. Using an electronic document and records management system (eDRMS) will assist in recording, tracking and monitoring records.

2) Record, Track and Monitor Documents

Document mismanagement and lack of an effective eDRMS are key contributors to poor record-keeping and can easily impede an organisation’s compliance to legislative requirements. When documents go missing or are unaccounted for, it could result in an agency’s inability to fulfil a Freedom of Information (FOI) request or lead to punitive measures under Australian record-keeping acts and standards. A comprehensive eDRMS is a fundamental part of an organisation’s ability to record, track and monitor organisations’ intellectual property.

There are many important characteristics of an effective eDRMS. Key functionality your eDRMS should provide includes;

- Automatic capture of records, and application of classification and metadata in the background. The ability to locate the correct content when it’s required is often dependent on metadata, so capturing quality metadata is important.

- The ability to manage content across repositories. Often organisations will find information saved in network drives,

(Continued over)

RECORDS MANAGEMENT

on computer hard drives, within applications and in cloud repositories such as SharePoint or OneDrive.

■ The ability to manage physical, digital and hybrid records, including the likes of email conversations and social media records.

■ The provision of a defensible audit trail. When a record is deleted, your eDRMS should preserve the metadata of the deleted record so that information on historical actions taken on the record and by which users, can be traced. This is essential when it comes to identifying whether business and legal guidelines have been adhered to and tracing any unauthorised activity.

Organisational content should be handled in accordance with your organisation's records management strategy. This will ensure that an appropriate system is in place to record, track and monitor content, and mitigate the risk of content becoming lost, and do so in a way that isn't at the expense of end-user's work processes.

3) Create and implement a records management strategy

A clear and actionable records management strategy should be at the heart of your organisation's records and information architecture, processes and procedures. It should be based on thorough research of appropriate policies and standards and audited regularly.

Organisations need to create and thoroughly document their records and information management processes and procedures, and ensure all staff have access to this documentation. Organisations should clearly identify the accountability of those who handle records and understand how this strategy will fit within the organisation's strategic business plan.

To ensure your records management strategy is compliant with current legislation, regular reviews are imperative.

4) Annually review / audit

Compliance is never a 'one and done' activity, especially when it comes to records and information management. Your records management policy should include an annual review and assessment of internal and external compliance in relation to appropriate acts and standards. The standards by which you measure record management efficacy should be based on national, state and international standards.

A thorough audit should take an impartial look at your record-keeping policies and processes. Does the execution match the language of the policy and the legislation that informs it? Where do they fall short? Where could they be

improved? Could they be made more time efficient while still adhering to legislative requirements? Do they get derailed? If so, how can you mitigate the causes of this?

5) Destroy records at the end of their lifecycle

Just as digital records can become vulnerable to data breaches, so too can your physical documents. Whilst statutory regulations dictate that some records need to be kept indefinitely, most records should be destroyed after a prescribed period of time.

Navigating the complexity of record disposal and retention requirements is a difficult task for most businesses. This is why it's important for organisations to do their due diligence in determining these requirements or contract the services of a records and information management specialist to do this on their behalf. This will help ensure that organisational policies are accurate and compliant.

The National Archives of Australia website provides some general guidelines for the compliant destruction of information. It elucidates that compliant destruction of information should be;

- Authorised by the archives via an active records authority
- The destruction needs to be irreversible
- Destroyed with the same level of security that was maintained during the records life-span
- Information should be destroyed in a timely manner and not kept longer than necessary
- The destruction of information should be accurately documented in accordance with the *Archives Regulations 2018*.

6) Ensure your records and information architecture is correct and efficient

The best way to think about information architecture is that it's a blueprint for your information 'warehouse' and is a crucial part of your governance strategy. Good infrastructure will ensure your organisational content is secure, findable/ searchable and is disposed of at the end of its lifecycle.

When designing your information architecture, carefully consider the following;

Business Classification Scheme (BCS) or Taxonomy: One of the easiest ways for organisations to manage information is by grouping related content together and then labelling and allocating each of these groups into a master arrangement. This is known as a Business Classification Scheme (BCS) and is a form of taxonomy that makes it easier



for organisations to search for and locate content. For example, with a BCS you can more easily provide permissions so that specific users have access to certain information based on the grouping defined in the classification.

Retention and Disposal Schedules (RDS) or information lifecycle design: A retention and disposal schedule is necessary in assuring that organisations are meeting their legal and compliant obligations with state and federal laws. By having a process that determines how long records should be retained before destruction as well as methods for identifying records due for destruction, organisations can not only reduce their exposure to compliance risks, but also significantly reduce the time and resources spent retrieving documents.

Metadata Schemes: Most organisations think that organising their folders in a network drive is adequate enough. However, truly efficient information management requires your internal documents to include metadata. Including metadata removes the time spent manually working out which folder to place a file in as a document management system can read a document's metadata and classify it accordingly. This in turn, makes document searching easier as you will not have to manually click through a myriad of different folders to locate the file you want.

Good information architecture will enable records to be captured and classified without impacting where and how your team works.

7) Capture records without disrupting the way end users work

If your records management system requires the involvement of end users (i.e. your employees), this will almost guarantee engagement issues which can stymie workflow, productivity and your record-keeping efforts. A modern, effective records management system will do its work in the background, appearing invisible to end-users and will possess the ability to manage records in-place across a variety of platforms (i.e. email, social media, cloud storage, network drives, computer desktops etc.), enabling your team to work how and where they work.

An effective records management system will also automatically capture metadata, which means end users won't have to manually input all metadata into a pop-up form when uploading and adding documents.

8) Digitise physical records

While digitisation of physical records can be seen as a time consuming and costly endeavour, the end result will far outweigh the interim costs and effort. Organisations will benefit from improved operational efficiency and ease of access to information (the ability to find a digital record is much quicker and easier than locating a file in a room full of boxes), significant savings in physical storage costs, reduced risk of losing records should there be a fire, flood or other disaster, and better integration with current business information systems.

As part of their digitisation policy, organisations should consider:

- What records management system you'll use to capture the digitised records, what access will be provided to these records, and what respective metadata should be captured
- The state of physical composition of the records which will affect the security, physical handling and digitisation equipment required, especially if the records aren't documents
- Whether the physical records can be legally destroyed and how this will be handled
- What type of digitisation is appropriate; a digital photocopy/ image or optical character recognition (OCR) which makes the record with machine readable text
- During the digitisation process, versions of the digitised

record will be created for processing purposes. How will these various versions be managed?

- How accuracy and quality controls will be maintained throughout the process
- Whether to digitise in-house or outsource, whilst considering the challenges that may be encountered in each scenario

9) Develop and maintain an information asset register

In order to understand your information and how best to manage and protect it, it is vital to first understand what the term 'information asset' means. An information asset is a body of information, defined and managed as a single unit so it can be understood, shared, protected and utilised effectively. Information assets have defined and manageable value, risk, content and lifecycles.

An Information Asset Register (IAR) is a formal inventory of information assets, which helps organisations better manage the information and records they possess and mitigate the associated risks.

They can be a useful tool for risk analysis and information security planning, for identifying critical systems for disaster recovery and business continuity, to inform digital preservation plans and to identify strategic records and information management priorities.

Organisations developing and implementing an IAR should consider;

- How your organisation will conduct an information review to determine what is and isn't an information asset, the value and lifecycle of each asset, and which regulatory requirements apply
- How to group, number and name information whilst taking into consideration business needs
- Whether there are opportunities for disposal, savings and/or efficiencies
- Creating mitigation strategies for identified risks
- Developing an action plan for managing this change with planned contingencies
- Defining who will be responsible (custodian) for the information assets and the register itself
- How often the IAR should be reviewed to ensure its accuracy and relevance, and who will conduct this review

The better you understand your information, the better equipped you'll be to protect these assets. Considering the above questions will help you to design and implement a strategic IAR as part of your broader records and information management strategy.

In Summary

Defining records management best practices and implementing an effective RIM strategy is imperative for organisations wishing to remain compliant and avoid the potential penalties of not meeting their record-keeping obligations.

Navigating the complexity of recordkeeping legislation can be an overwhelming challenge. This is why most organisations enlist the expertise of a records management specialist.

Our team of records management experts have been helping organisations navigate this complexity since 2008 and would be happy to assist your organisation or respond to any queries you may have.



Raelene Bennett

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The Intranet Is Dead... Long Live The Digital Desktop!

By Dean Britton

So, you've just started your new job with (let's say a medium to large organisation) and on the first-day induction you're shown the company intranet.

Option 1: "Wow!"

Option 2: "Woah!"

Option 3: "Meh"

You may not realise it at the time, but the company intranet is going to define your relationship with this employer and other employees in ways that may not be immediately apparent. And this might even be a factor which determines to some extent how long you stay with the organisation.

As a newbie, you have a privileged view of what most of the incumbents cannot see – implicit culture: the incumbents can't see it because they're already absorbed into it, like that '50s Sci-Fi wonder, the Blob.

This is because, whether we like it or not, the intranet encodes the company culture. This means that the style of the organisation, its way of working, warts and all, is explicitly and implicitly reflected in the style of intranet: it's the subtext. If the intranet is rigidly structured, static, difficult to change, lacking a nice flow – guess what type of organisation you're in? If it cares about you as an employee, getting the information you need to do your job and including you in the whole organisation's goals? – you get the idea.

It would be interesting for the Corporate Executive of an organisation to hold up some palm cards with brief statements about its purported culture (actual or aspirational) alongside the company intranet and ask itself, "do these align?"

Maybe we should ask to get a tour of the intranet before accepting a job offer!

So, given the intranet reflects back to the employee the organisation's culture, it's easy to understand the reasons for making sure it aligns with the business goals. Remember, employee engagement and the way employees perceive their workplace has a direct influence on productivity and that goes all the way down the line to customer satisfaction and, eventually, revenue.

If an organisation is genuinely interested in better ways of working (and which business isn't, unless it's an entrenched and protected monopoly, rent-seeker, or loss-making tax dodge?), it should have an intranet strategy that aligns with its overall business, information and technology strategies. This is going to be more important than ever (as many companies have understood, but not so many have realised) given the evolution of the intranet from a simple information delivery platform, to a digital workspace that becomes integral to the tasks we perform daily.

There are a few key elements of the intranet strategy that can easily contribute to a sound business case: among the biggest is search. One of the most frustrating tasks for knowledge workers is the difficulty encountered in finding the right information at the right time.

Here's a Post-It note business case for this: 1,000 employees losing 30 minutes (very conservative) a day due to lack of findability. That's 30,000 minutes per day, multiplied by a blended average \$50/hr, making a total of \$25,000/day or \$5.5m/year (220 working days). That's a "soft cost", granted. But it's still a lot of productivity – consider, too, that when someone is distracted like this from the task at hand,



that sense of frustration is going to pervade their following activities.

Search isn't just about the intranet, of course. But it should be as easy as possible to both find information hosted on the intranet itself as well as use the intranet to find information in other systems. This means getting data organised and making metadata work for you.

It's not just about big data: it's about good data. Getting data sorted out is no mean feat: but better search (findability) will have a direct correlation toward delivering automation and efficiency at scale because it requires, in essence, a working enterprise data model (as well as policy and standards to maintain it).

Another critical element for the modern workplace is "Appification" and mobility.

Company intranets should be transforming into something like a "digital desktop" – a virtual hub of business activity involving unified communications (social networking, instant messaging), business process management (tasks and automation) and information sharing (knowledge management). Some businesses are already a long way down the road on this journey, and some of these have the capacity to invest.

Here are some simple questions that can be interesting to ponder in the context of how important your company intranet is to you and your employees:

- Is the intranet just the "Corporate voice" – a one-way communication channel?
- How important is internal, corporate information to reducing risk and do we understand the role of the intranet in this regard?
- How can multimedia be better used and served to employees to aid knowledge sharing and training?
- How can we integrate unified communications across the enterprise (messaging, tasks, workflows and automation) for a truly "connected workplace".
- How important is "personalisation" to us; do we want employees to like the intranet?

Intranet approaches for the new generation will need to change. Stagnant intranets that are one-way channels for the corporation to "shout" at the employee, or simple information silos that reflect the corporate structure, will not help retain the new breed of knowledge workers.

Dean Britton is an Information Manager with many years' experience at senior levels in technology and project management roles, within both the private and public sectors.

Study: 89% of Finance Teams Yet to Embrace AI

Finance teams lack the digital skillset to embrace the latest advancements in artificial intelligence, causing a negative impact on revenue growth, according to a new study from the Association of International Certified Professional Accountants (the Association) and Oracle.

The study of more than 700 global finance leaders found that despite a clear correlation between the deployments of AI and revenue growth, 89 percent of organisations have not deployed AI in the finance function and only 10 percent of finance teams believe they have the skills to support the organisation's digital ambitions.

The report, titled "*Agile Finance Unleashed: The Key Traits of Digital Finance Leaders*" highlights that 46 percent of tech-savvy finance leaders report positive revenue growth, compared with only 29 percent of tech-challenged leaders.

Furthermore, organisations that have seen revenue growth are more likely to be deploying artificial intelligence compared to those where revenues are flat or declining.

However, only 11 percent of finance leaders surveyed have implemented artificial intelligence in the finance function, and 90 percent say their finance team does not have skills to support enterprise digital transformation.

"For me, robotic process automation, advanced analytics, and machine learning are three legs of the same stool," said John Merino, chief accounting officer at FedEx.

"The combination of those technologies and the ability to deliver them in an agile manner without long lead times and

extensive interface complexities creates a tremendous opportunity to capitalise on some really big efficiency gains in virtually every staff function.

The big win for us is to liberate that time and move finance up the value chain in what it delivers to the organisation."

The report identifies three common traits of tech-savvy finance teams:

■ **Modern Business Processes:** According to the report, tech-savvy finance leaders use advanced technologies and establish 'operational excellence'. For example, 86 percent of Digital Finance Leaders have a digital-first and cloud-first mindset, which gives them greater access to intelligent process automation and technologies such as artificial intelligence and Blockchain, which are commonly delivered via the cloud. Additionally, 73 percent centralise finance subject matter expertise in a global 'Center of Excellence.'

■ **Data Insights:** Leading finance teams are able to connect data that was previously in disparate applications to uncover new insights. They are increasingly relying on AI to uncover hidden patterns, make recommendations, and learn continually from the non-stop flow of business data. The report shows that organisations that have seen positive revenue growth are more likely to be deploying AI compared to those where revenues are flat or have declined.

■ **Business Influence:** Leading finance teams have been able to move beyond reporting and are using data-driven insights to influence the direction of the business. With reduced time spent on manual reporting processes and armed with accurate and timely data, finance leaders are empowered to partner with the business, recommend new courses of action and influence business strategy.

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E-INVOICING IN AUSTRALIA

the state of play

By Jussi Karjalainen

It is estimated that as many as 1 billion invoices are exchanged between businesses in Australia on an annual basis; however only 10-15% of those invoices are e-invoices¹, with the rest remaining paper-based. So, why has the adoption of e-invoicing been so slow in Australia and APAC? What opportunities does e-invoicing offer businesses in Australia?

October 2018 saw the Australian and New Zealand Governments signing the Trans-Tasman e-invoicing arrangement. With the arrangement heralded as the latest milestone in both Governments' commitment to progressing e-invoicing, as part of the Single Economic Market agenda and their ongoing efforts to create a seamless Trans-Tasman business environment.

The objective of the e-invoicing arrangement is to create and maintain a common Australia and New Zealand approach and communication standard to e-invoicing, in order to improve productivity and reduce the cost of doing business, for both public and private sectors, through an interoperable single digital economic market.

The agreement builds on the continued work of the Australian Digital Business Council to raise awareness of the benefits of e-invoicing and digital transformation of the back office. But is the Digital Business Council's message getting through? Are the benefits of e-invoicing understood in the region?

Let's start with the basics, e-invoicing is an automated process of submitting and processing an invoice in a digital format. Integrating the supplier's accounts payable (AP) solution with the seller's accounts receivable solution, for exchanging invoice information electronically in an automated way.

This process often includes validation of invoice information, acknowledgement of receipts and some specific business rules. Using e-invoicing to connect businesses and enabling them to trade electronically is a modern, innovative solution to the paper problem. It's been estimated that paper consumption per office worker ranges between 10,000 & 20,000 sheets a year, with a higher figure likely for accounting and finance industries².

The business and environmental impact of paper invoicing also means its unsustainable and hugely unproductive. Organisations can save 1-2% of turnover by replacing paper invoices with electronic invoices and optimising their supply chain³, so why are so many Australian businesses refusing to innovate to increase productivity and increase their bottom line?

1 https://www.billentis.com/Implementing_E-Invoicing_on_a_broad_scale_in_Australia.pdf

2 https://www.preton.com/pdf/PretonSaver_envi_white-PaperFinal_1403010.pdf

3 https://www.billentis.com/einvoicing_ebilling_market_report_2017.pdf

Simplicity is key

My view is that e-invoicing needs to be as simple as possible for the supplier to use, if you want to ensure high adoption. Historically this has not been the case, and as a result, supplier participation has been impacted. In simple terms, the technical challenge for suppliers has traditionally been too steep, and as a result, suppliers have elected not to participate in e-invoicing initiatives rolled out by their customers. However, recent technical advances have enabled more and more organisations to connect and trade electronically. The most successful approaches have been non-disruptive to the supplier.

A particularly successful approach in Europe is one that takes advantage of methods and tools, which are already ubiquitous and second nature to every organisation, in fact an approach that is already the second most popular way to invoice your customer in Australia today - PDF invoicing.

There are several approaches to PDF invoicing. At a simple level, PDF e-invoicing sees the PDF file act as a carrier and a way for people to visualise the content of the PDF. The latest technology takes advantage of this data layer and maps the invoice data direct from the PDF to an e-invoice structure.

In other words, the service is like mapping one flavour of XML to another flavour of XML. What is important in this approach, is that the party receiving the PDF (ie. the buyer) is working with an e-invoicing service provider, who can automatically extract the metadata from the PDF, not by manually entering the data or using OCR.

Instead of supplier needing to print an invoice from their accounting system, pop it in an envelope and mail it to their customer, most modern accounting systems can produce a PDF and have it emailed automatically. In fact, based on our statistics as much as 60-80% of suppliers already do this.

Clearly this makes sense, as there is no development and configuration to be done in their accounting systems. You simply modify the email address for your customer and create your invoices, as you used to. The top tier accounting systems, such as Xero, MYOB etc all have this functionality, in an 'out of the box' format.

Germany's ZUGFeRD standard is an interesting approach that embeds the data inside the PDF-A format. However, ZUGFeRD needs to be supported by the sender (ie. the supplier) for it to resolve many of the common barriers to adoption.

The obvious difference between that approach and a standard PDF e-invoice with a data layer is that a standard format is supported by all main stream cloud-based accounting systems, which can produce a PDF out of the box; whereas ZUGFeRD requires an accounting system to produce a PDF, with the XML embedded into it.

Where a discussion around PDF e-invoicing becomes important is when we talk about adoption, as it can easily be claimed to be the easiest way to create an invoice. This certainly is the case for an average Australian small or medium sized supplier. In the past, we have seen even the largest companies emailing their invoices.

PDF e-invoicing means that most suppliers can move to e-invoicing without any changes to their own systems. They create their invoice in the system that they currently use, create a PDF and email it over. Simple.

For an organisation with experience of working with a

(Continued over)



E-INVOICING

traditional e-invoice service provider, the challenge of “removing the barriers to onboarding to maximise supplier adoption” is likely to be viewed as a complex and difficult one. However, as is often the case with complex problems, taking a simple, fresh approach can result in a simple and easy to use solution. There are many organisations around the world that have realised the benefits of PDF e-invoicing. But it’s clear that high adoption of the suppliers that matter is one of the most important factors to a successful common e-invoicing standard.

The more electronic invoices you receive, the less paper remains in the business. The quicker you can get your suppliers on-board, the sooner you will realise the benefits.

Why is there often such a low take-up of e-invoicing particularly with small to medium size suppliers?

Well, there are two main barriers to adoption, namely the technical change suppliers must often make to their P2P systems and the perceived financial cost to the supplier. In fact, e-invoicing offers significant value, both to suppliers and buyers.

For buyers, it decreases costs, as they no longer need to use unreliable and expensive methods to capture supplier invoice information, such as scan and capture or manual data entry into their ERP or AP systems.

When implemented correctly, it also, eliminates processing errors and as the exchange is completely electronic, reduces processing time.

For suppliers, e-invoicing helps them to receive payments on time from their customers, reducing cost of invoicing and eliminating processing errors. It also often enhances the opportunity to participate in buyer-led payment advancements and dynamic discounting programs.

When the benefits are clear for both sides, and the rest of the world is largely ahead of us; what is Australia doing to increase adoption and to unlock that \$28 billion⁴ from the economy that e-invoicing is said to realise?

The good news is that alongside the Trans-Tasman e-invoicing arrangement, the Australian Digital Business Council has begun to work with businesses and e-invoicing providers in Australia to introduce standards and guidelines for e-invoicing, with an aim to increase adoption of e-invoicing across Government and businesses.

The Council is specifically encouraging the use of solutions, which lower the entry barriers for e-invoicing and enable rapid realisation of the associated benefits.

It is often the case that complex-invoicing approaches require

suppliers to comply with set XML or EDI standards, which almost always requires configuration or development work within a supplier’s systems.

This is obviously costly and time consuming, leading to business cases that only stack up with suppliers that send out significant volumes of invoices. The rest of us are left behind.

The key to adoption of e-invoicing in Australia,

There is no doubt in my mind that PDF e-invoicing can deliver significant benefit for Australian economy and the benefits are shared with both suppliers and buyers of all sizes. An integrated format, via XML or EDI, enables us to build a business case for the largest supplier and buyer relationships, however some of the entry barriers of adoption for middle and small supplier still exist.

Many companies often don’t have the resources to modify their system to suit an industry standard, and the benefits cannot be easily realised for suppliers, unless many of their customers are able to support the same approach. Similarly, to addressing the ease of adoption of the supplier, we must look at the benefit case for the buyer, or the customer. The Procure to Pay process, and the level of maturity within a buyer’s system, will ultimately determine the level of benefit a company, who is considering implementing an e-invoicing solution, can extract.

In other words, if the downstream process of purchasing and invoicing is manual, paper based and clunky, the benefits from an e-invoicing program will be limited to merely removing paper from their mailroom.

On the other hand, if the downstream process is sophisticated enough, the benefit case goes well beyond the paper. Benefits, such as the removal of purchasing and buying risk, significant enhancements in financial reporting, increased overall data quality and compliance, come into play.

So, let’s take the Digital Council at their word and adopt innovation to increase productivity. The early adopters have embraced PDF e-invoicing and are moving their businesses forward with the resources they have released. It’s time for everyone else to follow with confidence. We are living in the past and we will be left behind if we don’t.

Find out how e-invoicing can help your business <https://www.valtatech.com/e-invoicing-guide/>



Jussi Karjalainen

Founder and managing partner of Valtatech



The Neglected Purchase Order

By Kris Elliott, Upflow Solutions

Accounts Payable (AP) is often the first initiative when it comes to Business Process Automation projects, and it's easy to understand why. AP directly effects how much money leaves an organisation, it's a business process typically fraught with manual steps, and it's a process that crosses almost every industry so vendors tend to focus on it first.

AP Automation can also be seen by senior management as a way to get some high value quick wins on the board and encourage staff involvement in the wider Digital Transformation strategy. When it comes to the approval stages of an AP process, electronic approval of the Invoices is effective in that it confirms the accuracy and authority levels around vendor payments, however in some ways it is also the proverbial ambulance at the bottom of the cliff.

As a budget holder, wouldn't you rather people sought permission before spending your budget, rather than asking for forgiveness afterwards? If the approval is sought once the goods or services have already been consumed, then often it can be too late to reverse a transaction, even if you'd rather decline the authorisation of an invoice. When that happens, the approval itself essentially just becomes a rubber stamp.

The AP Invoice has an often-overlooked sibling document that is frequently left out of scope. One which I argue is more important to have an approval process wrapped around to ensure your purchasing policies are met. Of course, I'm talking about Purchase Orders (POs).

The very nature of a Purchase Order (PO) is to confirm the details of a transaction with a vendor before it happens to ensure transparency, accuracy and legitimacy of the transaction. However often the PO is left out of scope of the initial AP Automation project, which in turn makes the AP validation that much more difficult. Here are just a few quick reasons why you should consider a PO Automation project:

Visibility

Many businesses, particularly companies that started small and have since grown into the trusted brands we all know, still have the same processes around POs as when the business first started. The POs are often found in pre-printed carbon-copy books with hastily scrawled handwritten notations, often incomplete and without all the required details. Furthermore, they are often scattered throughout various desk drawers in multiple departments, or worse, across multiple sites.

Ask yourself a two quick questions: Right now, how many POs have been issued by your organisation that have not yet been invoiced? And what is the total value of those POs? If you can't answer those questions easily, or if you are beholden on end-of-month reporting to get that information out your systems, then ask yourself the follow up question: How accurate is our cashflow forecasting? By leaving POs out of scope of a Business Process Automation project around AP Invoices, you run the risk of not having visibility across your POs and minimising your ability to track outstanding orders or missing invoices.

Authority

Purchasing approval is not always the enforcement of a monetary transaction limit, though granted that is a common factor. It can also be about ensuring staff are using approved vendors. It can be about ensuring bulk purchasing arrangements are adhered to. It can be about ensuring that due

diligence has been carried out. In some cases, it can also be about fraud prevention and ensuring company money is being spent on company expenses.

Often companies that use POs have them siloed with the finance team who act as the gatekeepers to guard the access to corporate spending.

This can sometimes mean the process leading up to the issuing of a PO is dependent on manual steps such as email correspondence, phone conversations, business case documents, vendor quotes, tender responses, and CAPEX requests. While there are some finance systems that can allow you to create and manage POs, very few can also manage these initial business steps that lead to the manual keying of a PO into the system. It is important to realise that not all finance systems are created equally when it comes to purchase orders.

Many advertise a PO functionality though they can sometimes be what I call a 'Bullet-Point sales feature'. POs get listed as an option on a checklist of functional specs without much explanation as to how exactly they work.

Some systems may let you create a PO, though it may be missing the approval steps. Some systems may give you a PO reference, but not actually create an auditable document.

Other systems may even force you to create a portion of your POs retrospectively after the invoice arrives, so that the PO is converted into the invoice in order to process the transaction.

If your finance system only does part of the job, this begs an important question: What is the point? Sure, you need to do it because the PO reference might be a compulsory field in your finance system, but that's a technical reason not a process one. Technology should enhance best practice processes, not hinder them. The purchasing process does not start with the creation of a purchase order, so why would you have a business process or system that behaves like it does...?

Efficiency

When the AP invoice arrives one of the first tasks ought to be matching what you are being billed for against what you ordered and what you received. If this three-way matching (or two-way matching if you aren't dealing with a goods invoice) is validated, and if your PO was approved prior to the order being placed with the vendor, how much value is added to your business to then route the invoice for approval again?

By approving the PO ahead of the transaction, you are effectively spreading the approval process across the month rather than creating a bottleneck in your end of month processing. If you have multiple people involved in the ordering process it could be easy to double up on some orders. When your POs are based in physical PO books it is difficult to detect over-purchasing before it happens. Similarly, when POs are paper-based it becomes difficult to identify when a duplicate invoice is presented for the same PO. You must ask the question: If the goal of AP Automation is to improve efficiency, why would you build your process upon a foundation of manual steps and paper-based documents? Addressing AP Automation without factoring in a plan for PO automation would be like servicing a race-car engine and not changing tires. Sure, it might drive faster on the straights, but will it be fuel efficient and hold the track?



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Stop leaving money on the table by leaving scanners out of MPS offers

Dedicated scanners create new revenue streams for MPS resellers but many are missing the boat, says Angelo Krstevski, ANZ General Manager of Sales, Alaris, a Kodak Alaris business.

The potential for channel vendors to resell scanners and capture software in the MPS industry is significant. In its Managed Print Services Landscape 2018 report, Quocirca argues that MPS is a key enabler for accelerating digital transformation (DX) through digitization and workflow automation.

While many MFPs offer scan functionality in addition to core print, copy and fax functions, it's not always a case of one-size-box-fits-all. Dedicated scanners and capture software should also be considered as part of any MPS solution.

There is a natural synergy between print and capture technology. Scanners and capture software solutions are designed to support DX strategies and have the potential to address many print-related customer concerns including streamlining business processes, automating workflows and ensuring the security of information.

Furthermore by boosting their armoury with production-class scanners, resellers can extend their reach into other business areas such as the mailroom where there is no requirement for MFPs.

Moreover, MPS providers with customers using MFPs to digitise documents could in fact be losing money. While MPS customers typically lease hardware for a fixed monthly fee and pay per page for print-outs, scanning volumes are not charged for on a cost per page basis.

But maintaining the scanning component of an MFP is part and parcel of the resellers' service support and this can in fact be costly.

Alaris partners report that 18 percent of support calls are scanner related and more than three-quarters (79 percent) of these require an on-site visit to fix.

On average it costs an MPS supplier \$197 per call-out to fix a scanner related issue and with service revenue as low as \$28 per device (black and white) a month, the losses can very quickly add up.

Working more efficiently

With an MFP, it takes time to scan in multiple pages - one at a time. In fact, scanning a ten-page document on an MFP typically takes 67 seconds - that's compared to just 17 seconds on a dedicated scanner such as the Kodak i3300 Scanner. And while the device is tied up scanning, it prevents others that need to print or copy from working efficiently.

Furthermore, MFPs and scanners have different features for saving scanned images, for example entry-level MFPs offer basic send-to options, while others enable documents to be directly scanned into applications such as SharePoint.

Alaris scanners come with standard drivers and software to integrate with Windows, MAC and LINUX environments, and as such offer direct integration with all leading document solutions, enabling the seamless execution of more complex workflows.

Most MFPs have basic capture and imaging options which can be sufficient for instances where scanned documents require little image enhancement. However, businesses with more

complex workflows and those looking to automate manual tasks for increased efficiency, will benefit from the powerful capture, imaging and processing features associated with specialist capture software.

Capture software helps businesses automate paper intensive business processes by transforming paper documents into critical business information.

The ability to extract critical data from documents and seamlessly feed it into existing business processes, helps make workflows more efficient and workers more productive.

Individuals can run complex jobs with push-button ease, enhance data integrity and reduce the time and cost spent on document management.

Security on the MPS agenda

Quocirca's 2018 MPS Survey reveals that data losses remain widespread across companies of all sizes that use MPS. In 2018, 65 percent of respondents reported at least one data loss, an increase from 60 percent in 2017.

Alaris' new generation of scanning solutions support industry standard enterprise security protocols including HTTPS, WPA Enterprise and TLS Encryption for scanning over networks.

These models also offer the ability to pull document images and metadata into a transactional business process in a distributed environment at the point of transaction, which helps with securely attaching documents to business transactional systems, eliminating errors caused by batch processing.

Scanned data is processed exclusively through volatile memory, which protects sensitive information by erasing image data when the device is turned off.

Fleet management

Managing a fleet of scanners can be a challenge. Alaris solutions make fleet management easy. For example, the Web API available on the Alaris S2000 Series Scanners integrates the business app or application to the scanner directly without the need for a driver, removing the hassle of regularly updating multiple drivers.

Additionally, Alaris Info Input Portfolio offers web-based and mobile solutions designed to help businesses simplify document capture. Users can access Info Input from anywhere and it works with multiple platforms, many browsers and multiple devices including TWAIN-compliant scanners, Android and iOS mobile devices and MFP web browsers.

As a single vendor with a full portfolio of information capture solutions, Alaris can help channel partners meet customers' diverse, evolving needs and, improve their bottom line. By partnering with Alaris, resellers can expand their capture capabilities, enabling them to win new business in any industry with high-volume scanning workflows; reduce MFP device wear and tear, lowering service costs; and grow their reach into customers' operations with new revenue streams.

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Top 10 digital trends for NZ in 2019: IDC

Global technology research company IDC has released its 2019 Top 10 digital transformation trends for New Zealand. IDC says that by 2020 at least 55% of NZ organisations will be digitally determined, transforming their markets with new business models, developing digitally enhanced products and services.

At the same time, IDC says the Chief Digital Officer title will be short-lived and declining by 2023, as “digital will be fully embedded in organisations and no longer regarded as something special.” However, more than 60 percent of CEOs will have led digital initiatives at some stage in their career.

Louise Francis, A/NZ Research Director for IDC, says that while a little over half of New Zealand organisations will be digitally determined by 2020, customer advocacy will be key to success.

“We estimate that by the end of 2020, more than 60% of New Zealand business-to-consumer organisations will have adopted Net Promoter Score as their leading success metric. In the same time period, at least 20% of businesses will have created digital twins, which will enable flatter organisations and reduce the number of knowledge workers they need by 33 percent,” says Francis.

According to Francis, by 2023, 40 percent of NZ workers will be working with bots or some other form of AI.

“There has been some misinformed comment about AI coming to ‘steal all the jobs.’ In reality, many roles will be augmented and extended with smart bots or some form of AI. This trend

will require company leaders to redesign operational processes, performance metrics, and recruitment strategies.”

“At present 60 percent of NZ organisations do not have any digital KPIs. IDC sees this changing quite rapidly, so by 2023, 85 percent will have digital KPI sets,” says Francis.

The IDC analyst says by the end of next year, successful businesses will be allocating capital budget equal to at least 10 percent of revenue to fuel their digital strategies.

“By the end of 2020, 55 percent of NZ enterprises will have created data management and monetisation capabilities, enhancing enterprise functions, strengthening their competitiveness, and creating new sources of revenue. The other 45 percent will be in trouble if they cannot break free of their digital deadlock. Now, more than ever, speed and flexibility will beat size every time,” says Francis.

Other Predictions include:

- By 2020, at least 55% of NZ organisations will be digitally determined, transforming markets and reimagining the future through new business models and digitally enabled products and services.

- By 2023, the CDO title will be in decline, as digital will have become fully embedded, but more than 60% of NZ CEOs will have spent part of their careers leading digital initiatives.

- By 2020, 20% of NZ100 companies will have implemented advanced digital twins of their operational processes, which will enable flatter organisations and one-third fewer knowledge workers.

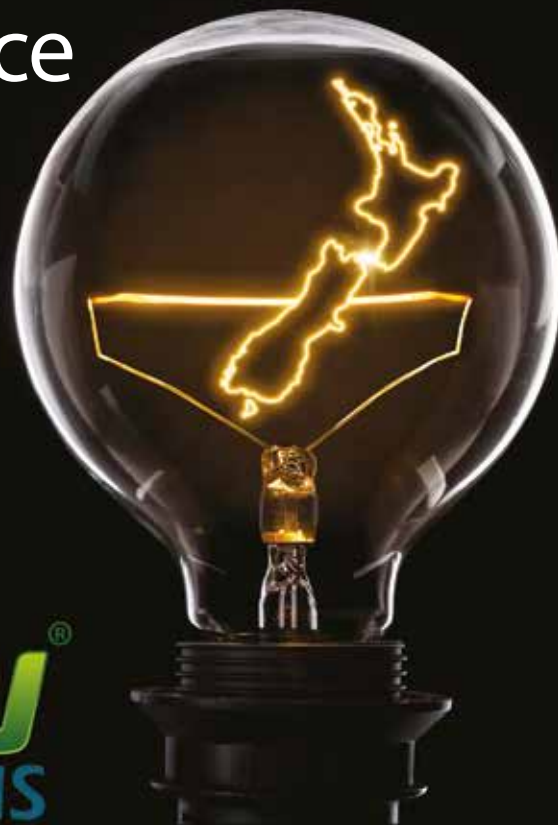
- By 2023, 40% of NZ workers will start working with bots or other forms of AI, requiring company leaders to redesign operational processes, performance metrics, and recruitment strategies.

Driving Digital Transformation in the New Zealand Workplace

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ABBYY is a global leader in content IQ technologies and solutions.

ABBYY offers a complete range of AI-based technologies and solutions transforming business documents and content into business value.

By providing digital transformation solutions to financial services, insurance, transportation, healthcare and other industries, the company helps organizations achieve the next wave of growth by understanding customers and delivering responsive real-time intelligent systems.

The flexibility of ABBYY AI solutions enables customers to utilize a diverse range of advanced technologies, platforms and solutions for classification, text analytics, data and entity extraction, and data validation via any communication channel and in any format.

ABBYY technologies are used and licensed by some of the largest international enterprises and government organizations, as well as SMBs and individuals.

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For more information, please visit www.abbyy.com/company.



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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 HQ in Lyon, France and US 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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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 centralised production environments. Fujitsu document scanners are renowned for their performance, image quality, fail-safe paper handling and Fujitsu's legendary reliability.

New innovations include:

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

Alaris

a Kodak Alaris business

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Alaris, a Kodak Alaris business, is a leading provider of information capture solutions that simplify business processes. Digital Transformation is the need of the hour for many organisations, and it starts with information and data capture. We exist to help the world make sense of information with smart, connected solutions powered by decades of image science innovation. Alaris drives automation through every business process dependent on document and data capture so that you can get the right information to the right place at the right time. Our award-winning range of scanners, software and services are available worldwide, and through our network of channel partners. For more information, please visit AlarisWorld.com.



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ELO Digital is a truly global ECM company with Australian expertise! Servicing more than 1,000,000 users in over 40 countries, ELO has become the natural choice in ECM. With more than 30,000 live projects the ELO product suite provides process enhancements, stability and compliance. The Australian based subsidiary engages with Certified Business Partners to deliver

1st class solutions for Records Management, Document Management, Accounts Payable processing, Workflow Management, Mobile access and much more.

ELO provides consultancy, development and support services from its offices in Australia – we are local and global.

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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.

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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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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.



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EzeScan is one of Australia's most popular production capture applications and software of choice for many Records and Information Managers. This award winning technology has been developed by Outback Imaging, an Australian Research and Development company operating since 2002. Solutions range from centralised records capture, highly automated forms and invoice processing to decentralised enterprise digitisation platforms which uniquely align business processes with digitisation standards, compliance and governance requirements.

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

EzeScan benefits include:

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- ensure standards compliance.



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FileBound is a cloud-native document management system with advanced workflow capabilities that automates the flow of enterprise work. FileBound is able to be deployed in organisations of all sizes and 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.



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UpFlow is a channel-first provider of Document Capture, RPA, Document Management, Workflow, Electronic Forms and Integration software products and services. UpFlow distributes and resells products such as PSlcapture, Flow Integration Platform, Ratchet-X RPA, Doc Mgt at FileBound. PSlcapture is an innovative document capture platform engineered to

combine automation, efficiency, stability and Enterprise-class scalability. PSlcapture 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. Ratchet-X is a mid-market Robotic Process Automation solutions that provides attended or unattended Bots for the automation of enterprise work. Flow is a fully featured Integration Platform that can connect an exhaustive list line-of-business systems with each other. DocMgt and FileBound are Document Management, Electronic Form and Workflow platforms that deliver exceptional ROI for most work automation projects. If you want to add high quality business automation products to your list of products and services then contact UpFlow today.



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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.



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InoTec Pty Ltd (IPL) in Australia and New Zealand is the only factory subsidiary of InoTec Organisationssysteme GmbH (IOG) in Germany (a 40 million Euro per Annum Company). Throughout the rest of the world IOG operates through distribution partners and is rapidly growing to be the supplier of choice for mid to high volume document scanners. IPL is 80% locally owned with the factory retaining a 20% interest and working closely with us and our Australian contracts. Within AU / NZ, IPL does not manufacture but has secured distributorships with the following companies:

- Zeuschel GmbH – Book, Film and Fiche Scanners
- WideTEK GmbH wide format scanners
- Mekel film, fiche and aperture card scanners
- I2Scan image batching software
- Digitech Scanning Software
- ABBYY Scanning Solutions Software

SharePoint Global Navigation Solution

Total Solutions has launched the SharePoint Compass, aimed at streamlining SharePoint's navigation. Total Solutions is a Microsoft-suite professional services, support, and product development firm based in Detroit, USA.

"Ease of navigation is one of the leading drivers of usability for any website," said Scott Hendrickson, Vice President of Product Development at Total Solutions.

"We have heard from many of our clients over the years that they needed a better solution than SharePoint's out-of-the-box navigation; that it did not meet their needs."

SharePoint's inherent navigation struggles in many common applications including hybrid environments and the modern user interface. It also requires that power users or IT administrators spend hours each month ensuring that the navigation is consistent across site collections.

"The value proposition of SharePoint Compass is that it spans all kinds of environments, is so simple that any user could set it up, and is as customisable as code allows," said Hendrickson.

"We believe that given the other options, to build or purchase bespoke solutions for tens of thousands of dollars, SharePoint Compass will be a highly preferable alternative."

Total Solutions is now accepting requests for demonstrations of SharePoint Compass. Please visit <http://www.totalsol.com/products> for more information or to sign up for a demo

X1 distributed ediscovery 2.0

X1 has announced the availability of v2.0 of its X1 Distributed Discovery and X1 Distributed GRC Solutions.

X1 Enterprise, a software suite composed of X1 Distributed Discovery for eDiscovery and eDisclosure, and X1 Distributed GRC for governance, risk, compliance and privacy, is claimed to be the first completely distributed data discovery and management platform.

Deployed at each end point or centrally in virtualized environments, X1 Enterprise allows practitioners to query many thousands of devices simultaneously, utilise analytics before collecting and process while collecting directly into myriad different review and analytics applications like Relativity and RelativityOne.

X1 Enterprise empowers corporate eDiscovery, compliance, investigative, cybersecurity and privacy staff with the ability to find, analyse, collect and/or delete virtually any piece of unstructured user data wherever it resides instantly and iteratively, all in a legally defensible fashion. These powerful capabilities drastically expedite eDiscovery and compliance projects and investigations from months or years to hours or days, in the process slashing the bloated costs of document review and hosting fees.

Version 2.0 of X1 Enterprise features include:

- Text and metadata only: ability to search for, process and collect text and metadata only, expediting the collection process by up to 90 percent and obviating the processing stage entirely while reducing post-processed data footprints – and therefore hosting costs – by 90 percent or more
- Direct to RelativityOne: import of post-processed data (natives or text and metadata) into the RelativityOne SaaS product, as well as Relativity, without the need for a load file
- G-Suite: support for Google's G-Suite of collaboration tools, including Gmail and Google Docs
- Lotus Notes: support for NSF files
- "Coffee Shop" mode: connect directly to and search, collect and/or delete from a user's machine even where the user

is remote, without requiring a VPN connection

- User review mode: incorporates user input and review into the data audit compliance and eDiscovery processes, e.g. for classification of sensitive content, data migration, governance or remediation, custodian interview, etc.

- "Headless" mode: supports full functionality of X1 Enterprise (except user review) remotely and without a user's knowledge, e.g. for covert investigations or sensitive audits

- "Silent" mode: supports full functionality of X1 Enterprise (except user review) remotely and without a user's knowledge, e.g. for covert investigations or sensitive audits

- Streamlined deployment package: allows for the rapid deployment of end point agents in enterprise environments, by corporations or their external service providers, thereby expediting the rollout and "time-to-analysis" window that is so critical in eDiscovery and GRC response

<http://www.x1.com>

Secure Document Management Platform

TransPerfect, a provider of language services and technology solutions, has announced the release of TransCEND 11, its proprietary enterprise document management platform.

Built on TransPerfect's longstanding document collaboration technology, TransCEND provides enterprise clients with an enhanced user interface, a true Windows Explorer-type environment, flexible metadata editing, improved full-text keyword search with corresponding smart folders, and end-to-end security.

Phil Shawe, President and CEO of TransPerfect, stated, "TransCEND 11 includes many new features aimed at both streamlining the due diligence process and better meeting our clients' needs for a secure, scalable repository for documents and files."

As part of the version 11 deployment, TransPerfect partnered with Microsoft to move its TransCEND application to Azure's secure infrastructure.

TransPerfect has been providing SaaS-based solutions for over a decade, ensuring enterprise clients receive streamlined functionality, an easy-to-use interface, and the ability to securely communicate beyond firewalls.

Some of the enhanced features TransCEND provides are:

- True Windows Explorer-Type Environment – Folders and documents appear in grid format with continuous auto-prefix for files, breadcrumb navigation, and a fully drag-and-drop-enabled user interface.
- Enhanced Index and File Management – In-place folder structure editing, including reordering, creating, renaming, and deleting folders, as well as HTML5-based, native drag-and-drop mass import and bulk export of documents, and Windows-type zip file handling (unpacking and extraction).
- Efficient Processing – Background operations happen seamlessly without affecting the ability for users to process other actions, and an intelligent toolbar provides simultaneous monitoring of tasks.
- Custom Fields – Additional flexibility on custom metadata fields lets users tag documents faster while adhering to granular permissions and access rights, and mass coding operations allow users to execute changes in bulk and impact values of multiple records at once.
- Advanced Search – Authorized users are able to conduct sophisticated searches against file content and metadata, built-in smart folders show different index views, and custom queries can be mounted and shared to save search results and come back to them in the future.

www.transperfect.com

Tearing down the paper fort, one scan at a time

The debate over the paperless office is by no means a new one. For the most part of the last two decades, there have been talks about eradicating the need for paper in the workplace and paving the way for a future that is purely digital.

While this utopian vision of an entirely digital office certainly encompasses both environmental and economic benefits, a significant portion of Australian's two million businesses are still experiencing the challenges of transitioning into an entirely digital economy.

The term 'digital transformation' seems to be a common phrase used to describe the way that we as a society are progressing. While our consumption of the written word seems to be shifting away from the tangible, and onto the screen, day to day operations in our workplaces tells us this is not entirely the case.

As stacks of contracts, magazines, brochures, printouts, receipts, post-its and business cards continue to clutter our desks, it is very clear that no matter how often we trash the paper, mountains more keep coming. Therefore, we need to prioritise our focus onto streamlining our paper to digital process, in order to minimise our paper trail.

As Australia continues to shift towards a highly digital business economy, it is important for businesses to start organising their operations through a strategic document management system. This can be achieved through the development of a synthesis between paper documents and their digital counterparts, in order to (literally and metaphorically) tear down the paper fort.

The reality is that despite our offices already having large multi-function units, which are great for scanning large volumes of documents, most workers will not be willing to get up for the small stuff. This is why we tend to hoard bits of paper - the pamphlet we picked up at an expo that may someday prove to harbour potentially useful information, the business card of the person we might need to call at some point



in the future, or the handwritten notes we scribbled down in that impromptu work meeting that we might one day come back to. We then find ourselves sifting through unorganised stacks to find that one thing we remembered we needed, many months down the track.

Enter the desktop scanner; the small but powerful solution designed to create a unified flow between paper and digital documents. Having a desktop scanner on hand results in the diligent digital backing up of important (and not so important) documents, so that businesses, and individuals are prepared in all scenarios.

Finding a desktop scanner that is compact, is built with connectivity at the heart, and is created with

intuitive software that is designed to pair with existing programs, ensures users have the necessary tools to master their paper to digital process.

Having a desktop scanner with these features makes an efficient addition to any small office space, reducing desktop clutter, and enhancing user workflows, for a more seamless interaction between paper and digital documentation.

Brother Australia can offer the exact technology you need to begin digitising your physical information. We have state-of-the-art scanning devices with the latest security controls installed, which can easily integrate with third-party document management and cloud services to maximise your productivity and collaboration.

Speak with our solutions specialists about your needs:

Phone: 1300 885 989

Email: corporatesales@brother.com.au

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



In January 2019, Keypoint Intelligence - Buyers Lab (BLI), an independent evaluator of document imaging hardware, software, and services, announced the Brother ADS-1700W was awarded with the Outstanding Portable Scanner Pick Award in the Scanner category. This award recognises the most impressive scanner among those evaluated by Buyers Lab during the previous 6-month test cycle.

"The Brother ADS-1700W packs a lot of features into a portable design," said Lee Davis, Keypoint Intelligence's Editor of Scanner/Software Evaluation.

"You don't typically find a colour touchscreen, wireless connectivity, and seamless integration with many of today's business software on a device this compact and portable - especially at a price this low," Davis said.

ABBYY on the UiPath App Store

ABBYY FlexiCapture Connector is now available for the UiPath robotic process automation (RPA) platform via the newly launched marketplace, UiPath Go!.

This enables RPA developers, line-of-business users and partners to instantly have the power of ABBYY's enterprise-level intelligent capture integrated directly within a UiPath robotic process flow.

"The goal of UiPath Go! is to increase the speed of automation development with industry-leading technologies, and we are excited to see ABBYY join our new RPA marketplace," said Ana Cinca, VP of Enabling Technologies at UiPath.

ABBYY FlexiCapture Connector provides UiPath users with the ability to accurately classify, extract, and validate data from structured and unstructured documents and communications - including purchase orders, invoices, applications, bills of lading and more - and deliver the structured data back into a UiPath robotic process. ABBYY and UiPath currently have joint customers across several industries, including financial services, manufacturing, life sciences, energy and healthcare.

<https://go.uipath.com/component/abby-flexicapture-connector-for-uipath-31cc20> Contact ABBYY at sales@abby.com.au or on (02) 9004 7401 for any further information.

Search Solution for Rich Media

AVP, a Brooklyn, N.Y. software development firm, has announced Aviary, a new, cloud-based platform for publishing searchable audio and video content. With the new platform Content holders can provide customised, access-controlled publishing of audio-visual collections so they are searchable and playable. Users can search across and within video and audio collections to find and playback specific moments

Aviary provides users search, navigation, and playback across organizations and collections of audio-visual content via an intuitive interface, while content holders have the flexibility to publish with their own look and feel, and with granular permissions - allowing organisations to decide exactly who can search and access their content.

With synchronised search capabilities, Aviary pinpoints search results to the exact place in audio or video content where a search term is found.

"Until Aviary, there has been no good option for organizations to publish truly searchable video and audio content. Aviary's synchronised metadata and AV capabilities offer a breakthrough user experience when working with audio-visual content," said Chris Lacinak, President, AVP.

"We are deeply grateful to the Fortunoff Video Archive for Holocaust Testimonies, the inaugural Aviary tenant publishing their collections, for their support and collaboration in the development of Aviary."

The Fortunoff Video Archive for Holocaust Testimonies traces its origins to 1979, when it began recording the testimonies of survivors, witnesses and bystanders of the Holocaust thanks to the increasing availability of broadcast video technology.

In addition to the Academic market, AVP built Aviary to bring the same audio-visual search and playback capabilities to corporations, government, sports, media and entertainment, performing arts, and not-for-profit organisations. Aviary customers pay monthly or annually in accordance with the quantity of content they publish, and their users can watch, listen, or search the cloud-based system for free.

<https://www.aviaryplatform.com>

OPEX Compact 'Envelopeners'

OPEX Corporation has announced the addition of the Series 210 Envelopener and the Series 410 Envelopener to its OMATION line of high-speed mailroom automation products.

The Series 210 incorporates many of the same key features as its predecessor, the OM2112 - such as superior milling cutter technology that provides complete edge-to-edge opening of envelopes for easy content extraction.

The proven milling cutter minimizes cut contents, and provides a soft, feathered edge for safe removal and processing. Select from one of three cut depths (an increase over the previous option of two cut depths) to match your mail types.

The Series 410 is perfect for mail centres that need to open and date stamp between 200 to 2000 envelopes per day. It includes all of the features of the Series 210 plus an inkjet printer and clear operator display for selecting from various pre-set jobs.

The printer enables printing of date and time audit trails as well as unique sequence numbers for traceable mail. Both the Series 210 and Series 410 models are capable of opening envelopes at up to 400 envelopes per minute.

Jon Stevens, Director of OMATION, says, "With the addition of the Series 210, we are carrying on the success of the OM2112 with a new look and additional features.

"We are also extending the capabilities of the OMATION Envelopener line with the addition of the Series 410. This unit, with its printing capabilities, has created an entirely new class of affordable, reliable envelope openers."

The Series 210 and Series 410 will be ready for shipment in mid-April, 2019

www.opex.com

DocsCorp keeps up with Office 2019

DocsCorp has announced that its desktop productivity suite is now compatible with Office 2019 and Office 365 in the cloud.

The DocsCorp suite of productivity tools include compareDocs for document comparison, cleanDocs for data breach prevention and metadata cleaning, and pdfDocs for PDF editing and bundling.

Shane Barnett, CTO and Co-Founder of DocsCorp, said rigorous testing was done internally to ensure a seamless experience for all DocsCorp Office 2019 users.

"Our Office integration is a key part of how we help people work more productively. Organizations moving to Office 2019 can be confident their DocsCorp solutions will move with them and perform as expected."

DocsCorp integration with Office 2019 on the desktop includes;

Microsoft Office ribbon (Outlook, Word, Excel, PowerPoint)

Right click menu actions

Save to location (including Microsoft SharePoint and leading DMS)

Compatibility with documents created with Office 2019

Office 2019 requires Windows 10, which is also fully supported by DocsCorp.

Existing clients who are making the move to Office 2019 are advised to download the latest version of their software from the myDocsCorp Portal.

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

Mobile App for RPA Bots

Automation Anywhere has released a mobile app to securely manage Robotic Process Automation (RPA) bots built using its platform.

"It's estimated that individuals spend an average of four hours a day on their mobile devices," said Abhijit Kakhandiki, senior vice president, Products and Engineering for Automation Anywhere. "The ability to control bots and manage the entire digital workforce from a mobile device, always within easy reach, is a gamechanger."

The Automation Anywhere Mobile App allows user to start, stop, pause or resume bots, monitor the status of bots, and measures the ROI from their digital workforce in real-time.

"Being able to kick off or cancel a bot from a mobile app becomes table stakes for evolving RPA," said Maureen Fleming, program vice president of IDC's Intelligent Process Automaton research.

"As bots incorporate more AI and become more event-driven, the types of tasks available to be automated from a mobile device will explode."

www.automationanywhere.com

Data Dividend for Large Investors

Behind trillions of institutional assets invested in hedge funds, private equity, and venture capital is a reporting process dominated today by manual pencil, paper, and typing.

Canoe Intelligence is using cutting-edge optical character recognition (OCR) techniques, natural language processing technology, machine learning, and a thorough validation process to eliminate this error-prone, slow, and un-secure manual data entry process for institutional investors, pensions funds and family offices worldwide.

"Canoe is defining a new way of data ingestion," said Wei Wang, Canoe Co-Founder and CTO.

"We have developed an advanced AI platform to streamline slow, often inaccurate, and expensive manual workflows," said Wang.

"Canoe's ground-breaking technology is unique to an industry in need of business process automation and one in which slow or inaccurate decisions can lead to costly errors."

Today's sophisticated allocators manage complex portfolios including scores of alternative investments such as hedge funds, private equity and venture capital. As a result, allocators are inundated with up to 50,000 documents annually, containing 200,000 or more critical transaction, valuation and performance data points.

Firms have historically relied on teams of individuals or offshore groups to manually manage data extraction and document storage, leading to industry-wide frustrations due to errors, latency, spiralling costs, and lack of control.

"Canoe is leading the charge to eliminate manual data entry," said Canoe CEO Seth Brotman.

Canoe solves these problems using a proprietary, patent-pending AI engine. Using the merits of traditional CRF modelling and deep learning algorithms, as well as OCR, Canoe's technology recognizes, validates and extracts unstructured investment data across asset classes, ownership structures, and document types. The data is organised digitally for easy and immediate access, and can be seamlessly fed into any portfolio reporting, accounting, and analytics platform.

<https://www.canoesoftware.com/product/>

Codeless BPA with SAP Concur

Codeless Platforms has announced the integration of its Business Process Automation (BPA) Platform with Concur Expense and Concur Invoice from SAP Concur, the travel, expense, and invoice management solutions, allowing users to automate processes between SAP Concur and ERP systems such as Microsoft Dynamics, Sage, SAP and more.

Automatic transfer of expenses and purchase invoices every 24 hours helps to improve productivity while reducing costs and minimising the risk of human errors.

"SAP Concur is an extremely useful and powerful product for managing expenses and invoices, and we were extremely pleased to develop dedicated integration solutions for it," says Matthew Lidster, Managing Director of Codeless Platforms.

"We have worked closely with SAP Concur to create Standard and Professional versions for both expenses and PO invoices, which will help users, developers and partners extend and automate SAP Concur workflow processes into their ERP system of choice."

Launched in 2013, the SAP Concur App Center aims to make it easy for travellers to find and connect to apps that integrate with solutions from SAP Concur and provide additional value for individuals and businesses. With more than 180 pre-built integrations and popular connections, the SAP Concur App Center extends the value of SAP Concur solutions.

www.codelessplatforms.com

An automated approach to RPA

EdgeVerve Systems, a subsidiary of Infosys, has announced the launch of AssistEdge Discover, a tool that is aimed at increasing the success rate of automation implementations at the enterprise level through process discovery. AssistEdge Discover automates processes sans human bias that often times lead to automation implementation failure.

Forrester reports that robotic process automation (RPA) will grow to a \$US2.9 billion market in 2021, bringing it to the forefront of enterprise digital transformation. However, over half of enterprise automation implementations still fail when business processes are not properly understood and manual knowledge is relied upon for process execution.

At an enterprise level, this becomes increasingly challenging as the amount of data and number of steps in each process increase. By eliminating human bias and reducing manual process discovery, AssistEdge Discover is claimed to help an enterprise realise the full value of automation and enable collaboration, effective change management and continuous process improvement.

AssistEdge Discover leverages user key strokes and sophisticated neural network algorithms to create an automation blueprint. It provides recommendations based on the understanding of how business processes are executed through four pillars:

Automatic Data Capture: Input such as mouse and key strokes from identified users can be monitored and recorded without interfering with the employee's work.

Remote Management of Data Capture: Administrators decide and control what data is being captured from which machines and users, and at which frequency, to ensure that no business and user sensitive data is captured.

www.edgeverve.com/assisted-edge-discover

Speedy Export from SharePoint

Vyapin SPListX for SharePoint is an application designed to export document/picture library contents and associated metadata and list items, including associated file attachments to the Windows File System. This tool is now released with full multi-threaded export engine capable of delivering more throughput in lesser time with several other feature enhancements

SPListX supports SharePoint 2016 / SharePoint 2013 / SharePoint 2010 / SharePoint 2007 / SharePoint 2003 and Office 365.

Highlights of Vyapin SPListX for SharePoint include:

- > Export SharePoint sites, lists, and document libraries
- > Offline collaboration
- > Archive SharePoint list contents
- > Archive old documents in SharePoint
- > Backup SharePoint contents
- > Migrate SharePoint documents & metadata
- > Perform in-depth analysis

Vyapin Software Systems Private Limited is a long time Microsoft Gold ISV partner providing applications and solutions for Microsoft technologies and platforms such as SharePoint, Office 365, Windows, Active Directory, Exchange Server, IIS and NTFS. Vyapin has been developing solutions for SharePoint since its first release.

<https://www.vyapin.com>

Smart PDF Data Extraction

Datalogics has announced PDF Alchemist version 2.3, which can accurately extract valuable data from PDF documents for specific business processes, information management, and automation.

Core features of PDF Alchemist include advanced table extraction algorithms for accurate data correlation and information reconstruction to ensure that the recomposed extracted content is tailored to specific device and end user needs.

This tool also features multilingual support that facilitates complex extraction capabilities for PDFs containing multiple languages and supports optical character recognition engine integration. Users can select HTML, XML and EPUB output options for optimal data management flexibility and device-responsive content delivery.

"Making sense of unstructured information contained within PDF documents is more important than ever before. Data locked within traditional PDF files is inaccessible to machine learning, to business process automation, and to advanced analysis and decision logic.

"With the addition of OCR support, and with our continuing improvements to structured data extraction of elements such as tables and logical text flows, this release of Datalogics PDF Alchemist enables more complete PDF data extraction than ever before," says Matt Kuznicki, Datalogics CTO.

Available as an annual subscription for both Windows and Linux 64-bit platforms, PDF Alchemist is offered as an easy-to-use scriptable server tool for seamless integration into existing workflows.

Also available as an SDK, PDF Alchemist is suitable for SaaS and OEM implementations.

<https://store.datalogics.com/>

A Question of Policy

Quantivate, a provider of governance, risk, and compliance (GRC) software and services, has announced the release of its new Policy and Document Management Software solution. It is the latest addition to a suite of software modules designed to help organisations improve performance and make more strategic decisions through integrated risk management.

Managing organisational policies and other important documents can be complicated and time-consuming. Quantivate's Policy and Document Management solution aims to equip organisations to simplify and streamline management processes through centralised storage, automation, and built-in best practices like employee knowledge testing.

"Organizations need a centralized and consistent approach to any type of document management," said Julia O'Connell, Quantivate's senior vice president of product development.

"Quantivate designed Policy and Document Management to significantly reduce the time and effort required for a typical document lifecycle process, giving users the options they need now and as their organisation grows and matures. This solution is a powerful new tool in Quantivate's toolbox, and we're excited to bring it to market."

Policy and Document Management can be used as a stand-alone solution or in combination with Quantivate's other software modules, including Enterprise Risk Management, Vendor Management, and Regulatory Compliance Management, among others.

The product offers a number of critical features to solve common policy management challenges, including:

- Policy creation and importing;
- Review and approval management;
- Employee attestation;
- Knowledge testing;
- Employee self-service portal; and
- Automated task management

<https://quantivate.com/solutions/policy-management-software/SOURCE> Quantivate

Wise-Sync and Datto Autotask

Invoice automation solution provider Wise-Sync has announced a new integration with Datto Autotask PSA as part of their strategic partnership with Datto, a provider of MSP-delivered IT solutions. Wise-Sync specialises in accounting automation for Xero and Quickbooks Online. Managed Service Providers (MSPs) can now seamlessly sync financial data to their cloud accounting platform.

"One thing business owners have in common is that they want to grow with certainty and to make sure their customers pay on time, every time," said Paul MacNeill, Founder and CEO at Wise-Sync. "We're helping to simplify the payment process so businesses can get paid quicker and reconcile their invoices with ease."

This new partnership will allow Datto Autotask PSA partners a full, seamless invoice sync. It will also streamline the creation of invoices and help automate payments.

"The integration between Datto Autotask PSA and Wise-Sync delivers the opportunity for managed service providers to have a seamless invoicing process with access to mission-critical financial data," said Joe Rourke, director of product management, Autotask PSA at Datto.

<https://www.wise-sync.com>

How A Swiss Army Knife Could Radically Change Your Digital Transformation Process

Digital transformation is a top priority at many enterprises as they attempt to convert more workflows to fully electronic processes. In the case of document handling and processing, many companies have implemented digital imaging solutions to convert their paper documents (mail, forms, archives, etc.) into digital documents. But that's just one step on the path toward digital transformation.

This isn't just about having electronic data or files; a true transformation involves fundamental changes in how that data is managed or utilized after the scanning process. That's where imaging and document management software plays an increasingly important role in digital transformation initiatives.

At OPEX, our scanners have been greatly enhanced by the expansion of features and functions found in our software package. CertainScan™ maps user-defined metadata from any OCR, MICR, or bar code on a scanned page. This allows for highly granular indexing of digital files.

That only represents the base software options that OPEX offers on their Falcon scanners. To enable a true digital transformation, one that helps companies take scanned documents and easily integrate them with other sources of digital data to create new workflows or enhance existing ones, you need a software suite that is both configurable and has full functionality.

Using OPEX edit™, operators can edit batches and metadata during the scanning process, including inserting, deleting, and moving images.

OPEX Transform™, for example, is a utility that can convert standard scanner output files into XML and ASCII file formats.

The software can convert tiff and jpeg images into multipage tiffs, PDFs, and PDF-A files. This ability to quickly edit, index, virtually batch, and convert images into different file types, unlocks new possibilities when it comes to turning scanned documents into data that can be leveraged across operations and applications.

A single scanned piece of paper can be converted into multiple

OPEX®



streams of outputs, which eliminates many manual distribution tasks while also making it easier for other applications and staff members to access the data within the documents.

The first area where these benefits are readily apparent is in the document management process itself.

Even companies that use high-speed scanners struggle with time-consuming manual prep processes and distribution processes. Documents have to be sorted and organized before scanning, and then those batches are scanned as separate jobs.

The documents are then physically resorted for storage in some cases. With configurable imaging software, all of those processes can be handled virtually, and in many cases, automatically.

Documents can be scanned as they arrive and then indexed and batched during the scan process. The digital document can then be distributed to multiple locations simultaneously based any rules the user establishes.

More importantly, the documents can be automatically converted to other file types for use by

additional applications – including remittance, enterprise resource planning, accounting, electronic health record, and other systems.

For enterprises of any size, the elimination of those manual preparation steps and distribution/archiving activities can represent a significant time and cost savings. It also makes the entire process more accurate and beneficial.

From there, the digital documents can be integrated into other workflows. The content can be used in data mining or analysis activities in ways that weren't possible before (or at least not possible without additional software tools or manual workarounds).

OPEX has also designed software to digitalize the process of managing the scanners themselves. With OPEX Insight™, supervisors can monitor the performance metrics and machine statistics on all devices, and allow users to modify job and operator settings from a single location.

Because the software tools are fully configurable, they serve as a virtual Swiss Army® knife when it comes to enabling these new digital operations.

For companies with an eye on digital transformation, having the right imaging software in place can not only help improve the flexibility of their scanning operations but also make it easier to create more innovative digital workflows across the organization.

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Phone: +61 484 596 470 (m)

*Web: [www.opex.com/contact/
sales-contact/](http://www.opex.com/contact/sales-contact/)*

4 Quick Steps To Set Up SharePoint For Project Management

By Billy Guinan, BrightWork

**Does your organization manage projects?
Does your organization have SharePoint? If
you answered yes to those questions, then
read on!**

SharePoint is an amazing tool for team collaboration. With its team sites, robust document management capabilities, and out-of-the-box integration with Microsoft Project, it is the perfect platform on which to build out a project and portfolio management solution.

With a few simple configurations to your SharePoint environment, you can set it up to mimic the structure required to manage projects of all sizes and type.

For the rest of this article, I'll cover four steps you can take to set up your SharePoint site to manage a project.

- Use the Quick Launch to manage the project management process
- Manage tasks with work management lists and dashboards
- Create Project Status Reports
- Use the Microsoft Project to SharePoint sync.

One of my favourite features in SharePoint is the ability to save sites as templates, that can be re-used again and again. So we'll also cover how and why saving project sites as SharePoint templates is a very practical approach to improving project management in your organization.

1. Use the Quick Launch to manage the project management process

In SharePoint, you can create team sites, which are essentially web pages for teams to collaborate and move work forward. With some simple edits to the Quick Launch, you can map your project management processes to SharePoint site (with as much or as little process as you want - it's up to you to decide what your team is ready for).

You can add different lists and apps to manage all aspects of your project, including the project statement, project issues, risks, tasks, goals, change requests, project status reports - or any other process you need to manage your project.

You can even group these links on the Quick Launch so that they map to various project phases. In the screenshots below, you'll see an example of how this can be done in SharePoint.

You could use this kind of breakdown, or anything that makes sense to you.

The most important part of updating the Quick Launch is that it matches your project management approach. It becomes the set of rail tracks to guide the team through the project and providing a window into the various project reports to keep the project going forward.

2. Manage tasks with work management lists and dashboards

All SharePoint team sites come with a Project Tasks list, where you can build out the project schedule and manage the project plan. Once you have the project planned and responsibilities assigned, you'll want to create a series of work reports to track all the tasks and work associated with the project.

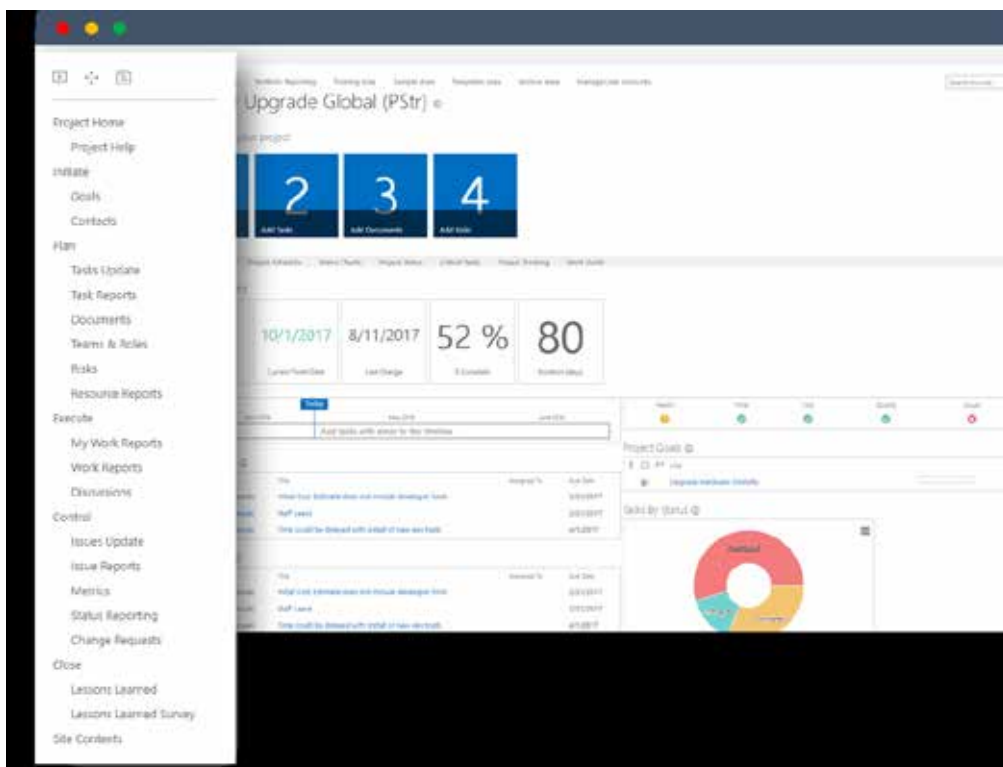
A few of the most basic reports you should create include:

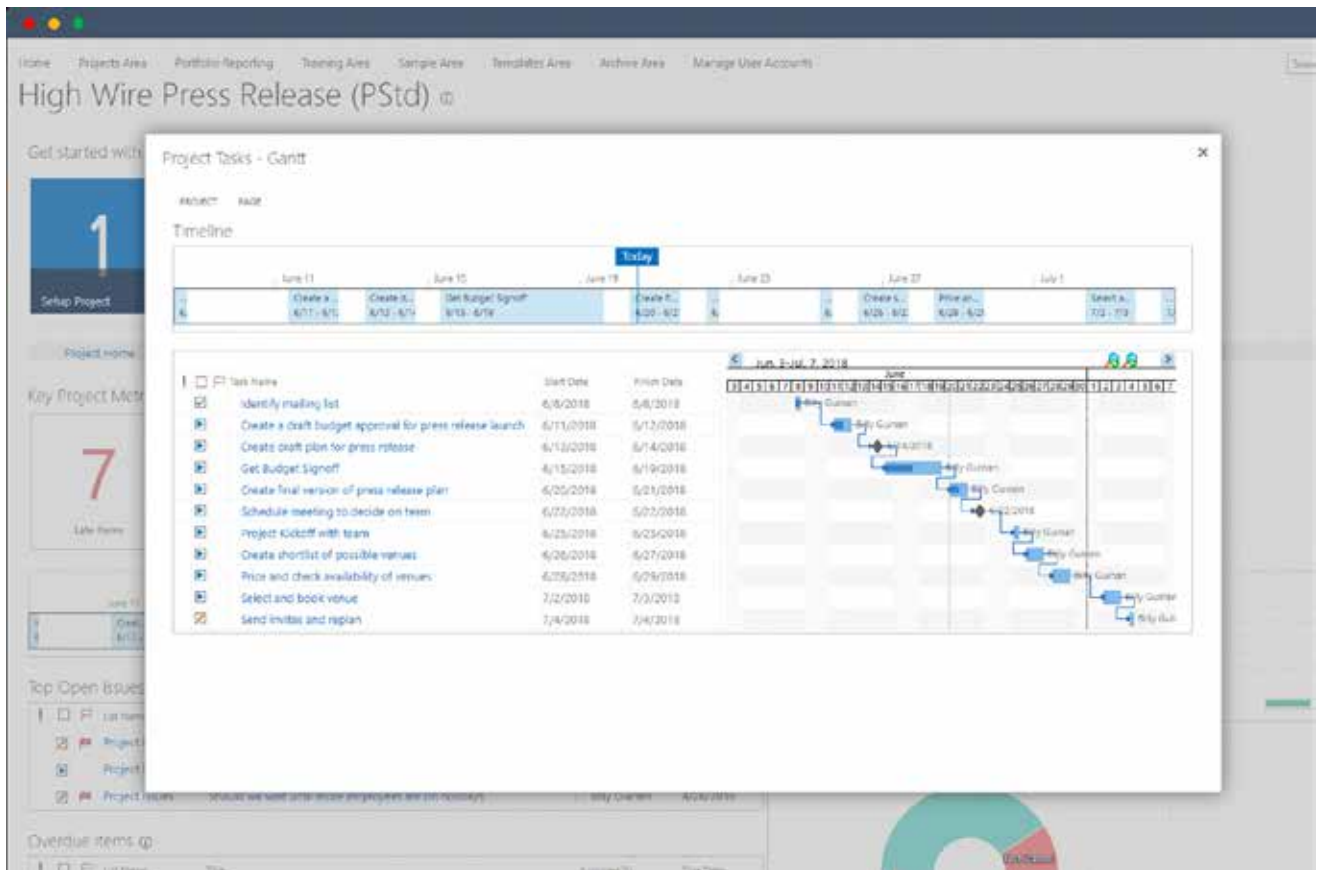
All Tasks: a view of the Tasks List with no filter, showing the full project plan.

My Tasks: a view of the Tasks List with parameters "assigned to equals me (the logged in user) - giving each team member a place to manage their individual tasks. As team members work on the project and update their tasks, the project manager has a quick view of the progress of the project.

Active tasks: a view of the Tasks List with parameter "status does not equal to completed" - providing the project manager and stakeholders an indication of the work that is still outstanding.

Overdue tasks: a report with the parameters of "status does not equal to completed" and "due date is less than today" - a very handy report for getting a snapshot of tasks that have





missed their deadline, so you can make adjustments and keep the project schedule moving.

Finally, you will want to add one of these work reports to the project homepage. We recommend the Active Tasks view – including a Gantt view of the tasks – so everyone involved has a sense of the progress of the project.

3. Create Project Status Reports

It's really easy to create project status reports and dashboards using a list and workflow in SharePoint.

You can enter project information in a datasheet view, and the workflow will turn that information into a project status dashboard.

When you “stop editing the list”, the datasheet will be transformed into a project status report with R-A-G status as well as other data such as health, time, cost, comments, percent complete.

You keep a history of these reports to reflect the status of the project at a point in time.

4. Use the Microsoft Project to SharePoint sync

The Tasks List in your SharePoint project site syncs seamlessly with Microsoft Project (Professional Desktop), significantly extending the project management capabilities of both SharePoint and Project.

With this capability, you as the project manager can manage the project schedule in Microsoft Project, and then sync that schedule back to the project site in SharePoint, where the team can access the plan and manage their work using the various work reports and task management views we discussed above.

And it really could not be easier!

In the screenshots below, you can see that the SharePoint to Microsoft Project synchronization is as simple as the click of a button.

Navigate to the Tasks List and build your initial project plan in the SharePoint site.

Click “Open with Project”

Make some changes and calculations in Project, and hit “Save”

Project will then sync with the Tasks List in SharePoint:

Task List in SharePoint is updated!

Once you have synchronized the Project Plan to SharePoint, the next time a team member enters the site, all of their work reports and dashboards will be updated with the latest deadlines and progress.

Likewise, they don't ever have to leave SharePoint to update the status of their work. Simply ticking off a task as complete will mark it done, and that task will also be updated the next time you open the plan in Microsoft Project.

All of this functionality is available with native SharePoint. With a little bit of SharePoint know-how, I'm sure you could get your site set up to do all of the above and get on the road to project management success with SharePoint. And one of my favourite features of SharePoint is the ability to save sites as templates.

So, once you have your project site set up the way you want, save it as a template that you can use over and over again, saving you time and effort, so you can focus on the work that matters: delivering a successful project

But why spend your time building it when we have a Free SharePoint Project Management Template already created – that does all of the above (and more)! The templates is available for SharePoint 2016, 2013 and 2010, and provides a SharePoint site that has been pre-configured to manage a project. It is yours to manage as many projects as you want, for as long as you want, on SharePoint for free.

<https://www.brightwork.com/product/free-sharepoint-project-management-template>

Forge.AI Raises \$11M to Decode the World's Unstructured Data

Forge.AI, an artificial intelligence company that promises to transform the world's unstructured information into structured machine ready data, has received a \$US11M funding boost.

Leveraging both natural language understanding technologies and a proprietary dynamic self-learning knowledge graph, Forge.AI transforms publicly available text-heavy content -- such as news reports, social media, financial reports, SEC filings -- into knowledge-rich, structured event feeds. Data science and engineering teams then apply these event feeds directly into their company's analytical decision-making processes and infrastructure.

"Businesses use Forge.AI's event feeds to open up fundamentally new data sets so they can better analyze risk, improve predictive capabilities and ultimately make better decisions for their organizations," said Jim Crowley, CEO and co-founder of Forge.AI.

"Our goal is to empower businesses with the real-time, mission-critical data that can meaningfully impact and change their business. We enable teams to model the world in new ways, be more efficient and apply their energies to the actual analysis versus drowning with intense 'data wrangling' challenges associated with unstructured data."

Forge.AI is initially focused on two broad information and data-rich sectors: financial services and the public sector. Financial institutions such as The Vanguard Group, currently leverage Forge.AI to source and structure their acquisition of critical knowledge from unstructured data sources.

"Over the next few years, companies like Vanguard will differentiate themselves from their competitors by harnessing machine-readable information for the benefit of clients, employees, and shareholders alike," added Warren Pennington, principal and head of FinTech for Vanguard's Investment Management Group.

"Through our partnership with Forge.AI, Vanguard is looking at data in fundamentally new ways, and we are using this data to enhance our business in areas like the client experience, internal operations, and economic analytics.

<http://www.forge.ai>

Tape Ark deal to liberate legacy data

Perth-based "tape to cloud" data management organisation Tape Ark has announced a partnership agreement with global data storage giant Seagate Technology plc based in Cupertino, California. The agreement will see Seagate's Lyve Data Services advanced data management expertise being combined with Tape Ark's unique data restoration technology, to enable zettabytes of tape-bound data to be rapidly migrated from client's ageing offsite tapes directly to large public cloud platforms of the customer's choice to enable access and analysis using AI-driven technologies.

It is estimated over one billion tapes are stored in physical offsite locations with much of this data at risk, not easily accessible, and susceptible to decay, deterioration and even permanent loss. The Tape Ark and Seagate partnership will allow organisations around the world to restore and preserve this valuable latent data, making it instantly accessible again to enable organisations to mine, explore, analyse and extract value from these massive datasets while also turning a stagnant cost centre into a valuable business asset.

Paul Steele, senior director of Seagate's Lyve Data Services said: "The legacy data in the world's tape archives holds the potential to deliver tremendous value and potentially major

breakthroughs in research, understanding, processes and practices in a wide variety of sectors, but only if it's brought in from the cold. We believe clients will gain an incalculable advantage by adding years or decades of latent data back into their data sets to be accessible for AI-enabled deep analytics."

Tape Ark Founder and CEO Guy Holmes commented: "The Tape Ark Team is excited and proud to be partnering with Seagate Technology - a global data storage leader and innovator. This announcement is a significant step in Tape Ark's roadmap for growth and coincides with the finalisation of our first round of venture capital funding."

Tape Ark, which has pioneered a groundbreaking software and tape-to-cloud data transfer interface, will expand its operations into Seagate facilities globally, establishing scalable, mass ingest facilities capable of processing tens of thousands of tapes per day - by far the largest facilities of the kind anywhere in the world. These new facilities, in Oklahoma and Amsterdam, will become Tape Ark's new North American and European operations base.

FLIP2PDF for speedy PDF conversion

Datalogics has announced the release of FLIP2PDF, a new PDF tool that converts Microsoft Word, PowerPoint, and Excel documents, images, PostScript and EPS files into PDFs.

FLIP2PDF is a versatile scriptable server tool that gives users better control over their file conversion process. The solution offers enterprise-level conversion to PDF, a file format that provides greater compatibility and reliability than any other file type. Built on Adobe technology, FLIP2PDF can expedite large batch conversions for seamless integration into their document workflow.

"After many requests from our customers, we are excited to be offering FLIP2PDF. This tool provides a seamless way to convert Office suite documents to PDF, even if users don't have Microsoft Office installed," said Matt Kuznicki, Datalogics CTO.

"FLIP2PDF allows our customers to simplify their workflows even further with this powerful, yet easy-to-use, PDF conversion tool."

FLIP2PDF is available as an annual subscription, and can be purchased through Datalogics online shop. A 14 day free trial is also available.

www.datalogics.com

Knowledgeone joins forces with Smead US

Knowledgeone Corporation has announced a new partnership with one of America's iconic records management companies, a US manufacturer of office filing products and records management systems, established in 1906.

Smead Manufacturing Company produces thousands of filing and organizational products and had revenue of \$US233 million in 2018. Knowledgeone Corporation will offer a wide range of Smead products including its well-regarded file-labelling software, ColorBar.

ColorBar has been integrated into the Knowledgeone products RF6-RM, RF6-EDRMS and RecFind 6 providing a seamless interface and allowing the user to run ColorBar from within the K1 interface.

Frank McKenna, CEO "The partnership of Knowledgeone and Smead is the perfect combination of the digital world with the physical world and it provides a complete solution for any enterprise content requirement. From file folders to Business Process Management; we have all bases covered!"

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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.

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If you would like more information, please visit:

www.fujitsu.com/au/scanners

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