idm.

information & data manager

A Startup Vision for AI-as-a Service.

Digital transformation underway at the DTA

Australia's Digital Transformation Agency (DTA), established in 2016 to promote digitisation of government services, is set to undertake a digital journey of its own as part of the Commonwealth Digital Records Transformation Initiative (DRTI). A tender announced by the DTA on July 1 joins a list of similar RFTs issued recently by four other Commonwealth agencies: the Administrative Appeals Tribunal (AAT), Office of the Commonwealth Ombudsman (Ombudsman), Tertiary Education Quality and Standards Agency (TEQSA) and the Aged Care Quality and Safety Commission.

The DTA with over 200 fulltime staff in Canberra is seeking an "innovative Software As A Service (SAAS) records management solution in order to improve their information management environment and practices and address their records management problems."

"It operates its main corporate environment in a cloud-only Azure environment with primary tools within the Mirosoft365 product and as such the solution would be expected to be optimised for this identity management and security environment."

While the DTA states in its latest annual report that "We set an example for other agencies in how we deliver our internal ICT services and products," it appears each of the five tenders issued under the Digital Records Transformation Initiative (DRTI) will be decided separately and the DTA will not play any lead role.

In common with all other agencies, the RFT includes a list of user scenarios that must be addressed by solutions providers, who will also have to undergo separate live online Proof of Concept (POC) workshops for each agency if they are successfully shortlisted. Each agency is offering to pay separate compensation to shortlisted vendors for undertaking the POC workshops,

Each of the RFTs includes a requirement for automation of records capture and classification through use of Machine Learning or other AI technology. The DTA also ask for "a single governance approach through which records managers see and manage records across multiple systems that facilitates consistent, effective and strategic records management decisions."

It notes, "Record classification is traditionally problematic as it often requires significant user intervention when users may not consistently understand how and when to assign relevant categorisation and also relies on users centralising information outside of its' normal business system in order for it to be managed."

One point that is emphasised in all the Digital Records Transformation Initiative (DRTI) tenders is that the agencies are "not seeking a traditional Electronic Document and Records Management System."

Some industry experts are skeptical whether the revolution being championed by the DRTI will be able to deliver the desired outcomes.

"The approach of managing-in-place based on records identification using autoclassification is a good concept in principle, but will not result in the ability to discover who knew what and when. That is, the manage-in-place concept is only as good as the ability to link a story together with good metadata, which is normally pretty thin in most organisations!

"So the evidence chain is not easy to discover with manage-in-place solutions, given the information still resides in independent silos. To overcome this, you need an excellent search mechanism, which is emphasised in the tender documents, but search mechanisms have proven over and over again that they are expensive and time-consuming to implement.

"Not only that, search is only as good as the metadata and contextual information available, and as I said before this is usually pretty poor! So, in the end you're spending a lot of money to get very little result."

ABBYY/Kodak Alaris win 2021 Census deals
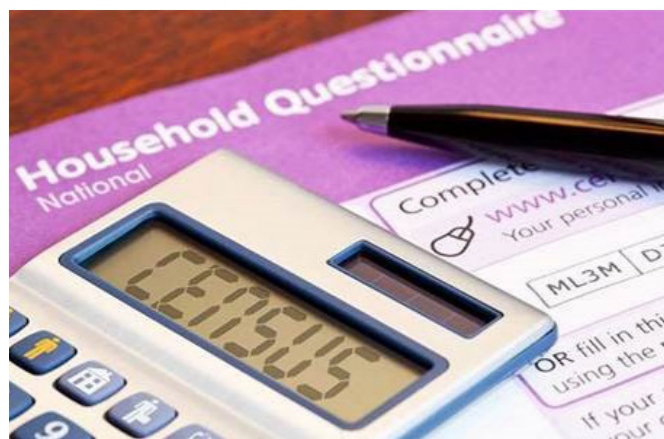
The Australian Bureau of Statistics has committed to the ABBYY Flexicapture 12 platform for data capture of Census forms at the 20201 Census, on a new and existing fleet of Kodak i5850s scanners. ABBYY Flexicapture 12 is a new direction for the ABS which previously relied on IBM's Intelligent Forms Processing (IFP) software. However, this is the 4th consecutive Census win for the Kodak scanners for Australian distributor ACA Pacific.

Kodak Alaris has a strong track record in major Australian government data capture projects, having provided the scanning platform for the 2017 Same Sex Marriage survey and 2019 federal election.

"The ACA software and scanning infrastructure, which will be used by the Census Data Capture Centre, is expected to capture as many as three million paper forms," said Soula Macfarlane, Director of the 2021 Census Data Capture Centre.

The Census paper data capture software contract is worth $A2.6M, while the Kodak scanner deal is for $A1.2M. According to an ABS spokesperson, "The Australian Bureau of Statistics (ABS) engaged ACA Pacific to provide scanning hardware and software for the 2021 Census and ABS household and business surveys.

"The solution will scan and capture written responses on the Census and other ABS paper surveys, and turn them into electronic form. It also includes a repair functionality, which will improve the quality of scanned data."

The ABS is planning a range of digital initiatives for the 2021 Census. The most significant is the digital service, which will include the online Census form, website and a range of self service options such as the ability to order a paper form. PwC)Australia' won a tender in 2019 to supply the digital services side of the Census after the outages that affected the 2016 Census.

Open-Source ML to boost AI uptake

ABBYY has announced the launch of NeoML, an open-source library for building, training, and deploying machine learning models. Available now on GitHub, NeoML supports both deep learning and traditional machine learning algorithms. The cross-platform framework is optimized for applications that run in cloud environments, on desktop and mobile devices. Compared to a popular open-source library, NeoML

offers 15-20% faster performance for pre-trained image processing models running on any device.
* The combination of higher inference speed with platform-independence makes the library ideal for mobile solutions that require both seamless customer experience and on-device data processing.

As open source becomes a staple in the development of mission-critical software, with 95% of IT leaders asserting that it is strategically important, ABBYY aims to support advancements in artificial intelligence by open-sourcing its machine learning framework.

Developers can use NeoML to build, train, and deploy models for object identification, classification, semantic segmentation, verification, and predictive modeling, in order to achieve various business goals.

For instance, banks can develop models to manage credit risk and predict customer churn, telecom companies – to analyze the performance of marketing campaigns, retail and fast-moving consumer goods (FMCG) – to build remote client identification with face recognition and data verification. One of the key advantages of the framework is its dramatically more efficient use of available cloud resources.NeoML is designed as a universal tool to process and analyze data in a variety of formats including text, image, video, and others. It supports C++, Java, and Objective-C programming languages; Python will be added shortly. NeoML's neural network models support over 100 layer types.

It also offers 20+ traditional ML algorithms such as classification, regression, and clustering frameworks. The library is fully cross-platform – a single code base that can be run on all popular operating systems including Windows, Linux, macOS, iOS, and Android – and optimized for both CPU and GPU processors.

"The launch of NeoML reflects our commitment to contribute to industry-wide AI innovation," said Ivan Yamshchikov, AI Evangelist at ABBYY.

"ABBYY has a proven track record of technological innovation with over 400 patents and patent applications. Sharing our framework allows developers to leverage its inference speed, cross-platform capabilities, and especially its potential on mobile devices, while their feedback and contribution will grow and improve the library.

MeoML supports the Open Neural Network Exchange (ONNX), a global open ecosystem for interoperable ML models, which improves compatibility of tools making it easier for developers to use the right combinations to achieve their goals. The ONNX standard is supported jointly by Microsoft, Facebook, and other partners as an open source project.

ABBYY invites developers, data scientists, and business analysts to use and contribute to NeoML on GitHub, where its code is licensed under the Apache License 2.0. The company offers personalized developer support, ongoing review of reports, regular updates, and performance enhancements. Going forward, ABBYY plans to add new algorithms and architectures, as well as further increase the speeds achievable using the framework algorithms.

To learn more about NeoML, visit: https://github.com/ neoml-lib To learn more about ABBYY's Digital Intelligence solutions, visit: https://www.abbyy.com/

* According to ABBY internal tests. NeoML offers up to 60% faster performance than TensorFlow. The test results NeoML vs TensorFlow are available here.

TOTAL: 14,622 INV №
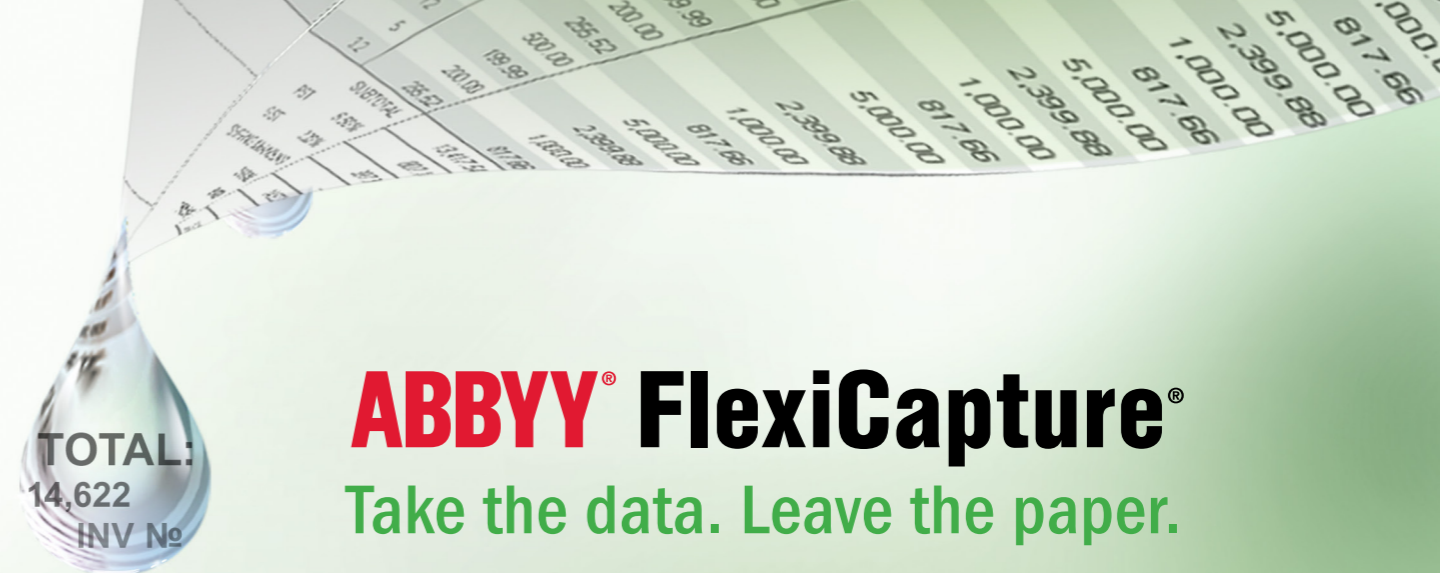
ABBYY® FlexiCapture®
Take the data. Leave the paper.

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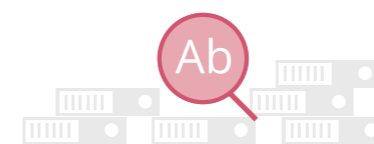
Document Archiving
Captures paper documents and converts them into searchable digital files that include metadata, and which are optimized for digital archiving and records management processes.

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

9 Critical Information Risks in Collaboration Platforms

By Brent Middleton, AvePoint

Collaboration platforms can be on-premises such as SharePoint Server or file shares, or in the cloud-like Office 365, G-Suite, Dropbox, and Box. Either way, not all sources are created equal when it comes to information risk.

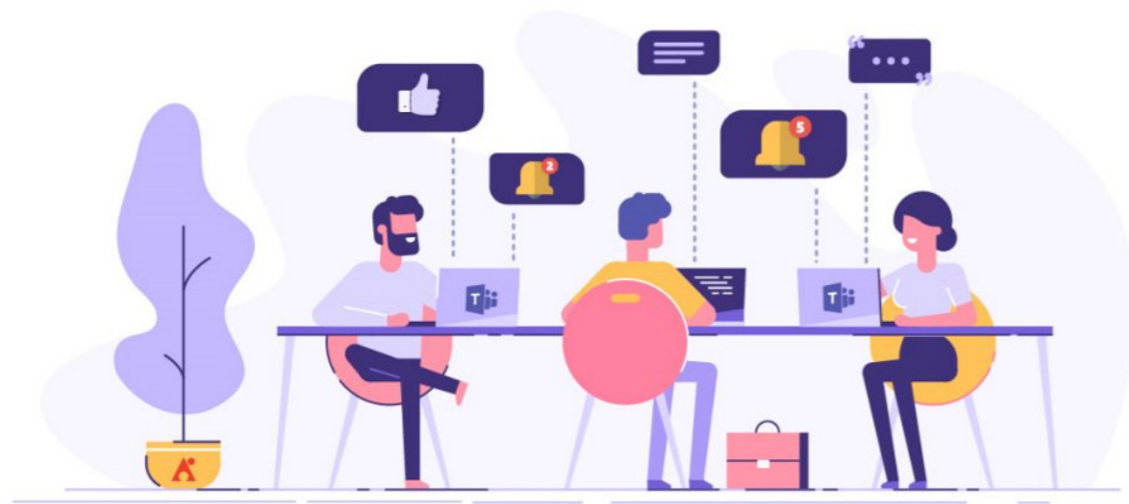Generally, the substantial investment cloud providers make in their infrastructure security makes the cloud more secure than on-premises solutions. Additionally, some cloud providers like Microsoft have invested in more native security and compliance tools than other vendors.

However, regardless of whether your data is in an on-premise or cloud environment, or what vendor you're using, collaboration platforms have common information risks that can be mitigated. These include:

1. Operational risk through constant usage in multiple daily business processes. The relentless frequency of use by employees across the organization increases the likelihood of inappropriate activities, ignored policies, and inadvertent breaches.

2. Compliance risk through disparate and non-integrated information protection approaches. While each collaboration platform is likely to offer its own approach for information protection, the organization is left without a holistic approach. The sheer number of different services, each with their own unique protection controls, creates a complex and conflicting control space, which surfaces new information risks rather than dissolving current ones.

3. Unquantified privacy, reputational, and compliance risks due to non-classification of data. Collaboration platforms are used to store, share and give access to unstructured data—including confidential, personal, and sensitive data—which is often not classified in collaboration platforms and is therefore without appropriate controls.

4. Operational risk through employee selection and usage of collaboration platforms outside the purview of the organization (shadow IT). The Risk and Compliance department is unaware that cloud services are being used. The Security Operations team doesn't have the

ability to capture and respond to security incidents in unidentified cloud services. The IT department is bypassed and therefore not involved in ensuring appropriate security controls are enacted, such as access controls to prevent a breach.

5. Operational and compliance risks due to an expanded set of locations where data responsive to Data Subject Access Requests and Data Deletion Requests is stored (these actions are required by GDPR which is covered in more depth in Chapter 2). Additional locations increase the cost and complexity of response.

6. Compliance and privacy risks through an ever-expanding set of options for sharing data with other people, both inside the organization and external to it. Newly adopted cloud services introduce uncontrolled ways of sharing data, and even sanctioned services such as Office 365 place many different sharing options at the fingertips of users. The proliferation of sharing options increases the likelihood of inappropriate sharing and therefore can cause breach situations.

7. Compliance and privacy risks due to data sprawl and the increased likelihood of inappropriate access, because copies of controlled data and duplicated information are stored without the appropriate controls in place.

8. Corporate and privacy risks due to third-parties having access to your cloud environments for carrying out system management and administration responsibilities. While personnel from managed service providers, trusted third-party consulting firms, and even the cloud vendor often need administrative access to system controls, they should be prevented by design from having access to the data within the system.

9. Corporate and privacy risks because of having access to third-party data in your environment. Many privacy and data regulations make the entire supply-chain responsible for mitigating information risk. This means you not only need to protect your own organization's data but also the confidentiality, integrity, availability and legal basis of collection of the data from your supply chain as well.

This article is an excerpt from AvePoint's new Mitigating Collaboration Risk Workbook. Originally published at https://www.avepoint.com/blog/protect/collaboration-platform-information-risks/

AIIA calls for Digital Capability Ministry

Australia's peak industry representative body for innovation technology is urging the Morrison Government to appoint a Minister for Digital Capability. The Australian Information Industry Association (AIIA) says that by creating the role – similar to one that existed under the Turnbull Government with Angus Taylor responsible for Digital Transformation – it would prove to be effective in both industry engagement and policy prosecution across and inside government..

The recommendation states that the Minister should sit inside the Department of Prime Minister and Cabinet and report directly to the Prime Minister, advise Cabinet and have a whole of government and coordination role.

The Minister should be a conduit for industry and coordinate policies supporting Australian sovereign digital capabilities, whole of government digital policies, government procurement policies and economy wide digital transformation requirements including state and federal coordination.

The AIIA CEO, Ron Gauci said: "Digital policy is fragmented across the federal government departments with responsibilities split across Home Affairs, Attorney-General, Defence (ASD), Digital Transformation Agency, Communications and Industry portfolios.

"Given the fragmentation, there is no central coordination of advice to the Prime Minister and Cabinet on many critical issues. We must have a cohesive approach and understanding by portfolio Ministers to issues such as cyber security and sovereignty, supply chains, skills, and data as major decisions are being made in these areas.

Digital technologies continue to be critical to the Australian economy and every level of business and government. During COVID-19, digital technology and its underlying infrastructure has supported the economy and will continue to be a crucial baseline for a successful modern Australian economy moving forward.

"The pandemic has also highlighted the need for sovereign capabilities in the digital supply chain. Australia must have the skills and innovation ecosystem to support a globally competitive economy as this step change into digital transformation occurs," Mr Gauci said.

First e-prescription in primary care

Australia's first paperless electronic prescription in primary care has been successfully prescribed and dispensed in Victoria, marking a significant first step in the national delivery of electronic prescriptions.

The first electronic prescribing and dispensing occurred between Anglesea Medical and Anglesea Pharmacy. It used the "token" model where the doctor sends the electronic prescription along with a code or "token" to the patient by SMS or email. The patient then forwards or presents the code to their chosen pharmacy for dispensing.

According to Dr David Corbet at Anglesea Medical who prescribed the first electronic prescription, "The process is as simple as writing the prescription in the usual manner and, with the consent of the patient, selecting that the prescription is generated as an electronic prescription."

Pharmacist Jason Bratuskins dispensed the first electronic prescription in his Anglesea pharmacy. He commented, "Our patients and staff have been profoundly influenced by the isolation requirements of COVID-19, and it has been terrific to be part of efforts to re-define how we support our patients with alternative options for fulfilling prescriptions. I was pleased to see that this could sit comfortably alongside our existing processes"

The successful electronic prescription occurred using the Best Practice prescribing software, prescription exchange service eRx Script Exchange, Fred NXT Dispense and MedView Flow.

The token model will work alongside the Active Script List (ASL) to provide patients with flexibility in how they digitally access their medications.

This success covered the entire electronic process of the token model: prescribing electronically in Best Practice, providing the patient with a token with the required number of repeats via eRx, sending the dispensing request to the pharmacy, integrating it into the pharmacy's workflow, based on MedView Flow, and then dispensing in Fred NXT.

www.erx.com.au/eprescribing/

SA Health delivers Teams to 40,000+

South Australia Health has deployed Microsoft Teams to over 40,000 personnel in one week to provide a collaboration capability as it responds to the COVID-19 Pandemic. SA Health declared a health emergency in response to COVID-19 in mid-March, it also established a series of specialist clinics and testing centres and encouraged employees to work from home if at all possible.

In order to facilitate communications – particularly among clinical teams – while maintaining appropriate social distancing SA Health has made Teams available to all personnel. Leveraging the SA Government's Office 365 central tenancy, SA Health was able to offer employees the opportunity to use Teams on their own devices to ensure that they could keep in contact with one another and collaborate on work tasks.

Teams is being rolled out as part of the standard operating environment for SA Health desktops and laptops, with users now offered the option to roll out on Android or iOS devices as well. The deployment has been achieved through a partnership between SA Health, Microsoft and SA's Office for ICT and Digital Government.

According to Bret Morris, Chief Digital Officer for SA Health; "SA Health and the Office for ICT and Digital Government was pleased to work with Microsoft to deploy Teams so clinicians and staff can access a secure, modern communication and collaboration platform from anywhere, at any time, and on any device including iOS and Android.

"At a time when many of our staff were required to work from home, the ease of use of Teams meant we needed to provide minimal training. Clinicians and staff recognised quickly adopted the technology, resulting in exponential growth in uptake; to 13,000 users in just two weeks."

Software Growth to continue, despite COVID-19

New research from DocsCorp finds that updating underperforming or outdated legacy software will be a priority for businesses in 2020 – despite the impact of the global pandemic COVID-19. More than 60% of people surveyed said the main objective of buying new enterprise software would be to improve productivity, as opposed to reducing costs or increasing reporting capabilities.

DocsCorp surveyed 500 Project Managers in the US in March 2020, when businesses' responses to the escalating health crisis were already in place, and several of the country's biggest cities had implemented various stages of lockdown. The findings show that the response to COVID-19 has not adversely affected investment in enterprise software. Possibly, it helped some organizations realize their existing systems weren't ready to support a fast transition to remote working.

Those surveyed said the most significant barrier to purchasing new software was budget. One third of respondents said their most recent software purchase went over budget, and more than half said it also took longer to implement than expected. Despite these challenges, more than 40% say they plan to purchase new enterprise software this year.

A lack of software demos and pilot programs may go some way in explaining the misjudged expenses and time frames. 43% of Project Managers surveyed did not organize a software demo with the vendor before their last enterprise software purchase, and nearly half didn't run a pilot program before deployment.

DocsCorp VP of Global Commercial Operations, Ben Mitchell, commented on the research: "We hear directly from IT managers, CIOs, and CTOs that they want to update and modernize their core systems so they can take advantage of breakthrough technologies like Artificial Intelligence (AI). Given the current climate, they also want to be able to support agile and remote working – and not all of their current enterprise software will support that."

DocsCorp partnered with Chris Doig, enterprise software selection consultant, speaker, thought leader and author to publish a new guide designed to help people switch to software that's better suited to how they do business.

Chris commented on the latest research: "Enterprise software should be an investment, not an expense. It can transform how a business operates, increasing productivity and, ultimately, profits. But it's not always easy to buy enterprise software that meets every expectation and delivers a true return on investment. More than 90% of enterprise software purchases cost more than budgeted and deliver less than hoped."

This new resource is designed to make selecting and purchasing enterprise software easier. It is full of expert advice on identifying underperforming software, running a successful software evaluation process, avoiding common mistakes, and creating a deployment plan.

Download A straightforward approach to navigating the software selection maze here for free.

Knosys signs NZ deal with ANZ Bank

Australian knowledge management firm Knosys has won a contract worth $NZ840,00 to implement a standalone KnowledeIQ system at ANZ Bank New Zealand, as part of the ANZ's effort to comply with Reserve Bank of New Zealand (RBNZ) regulations. The project is driven by Banking Standard 11 (BS11) which requires New Zealand based banking businesses to have their own service operations and technology systems which are independent of the operations of any foreign parent entity

ANZ Bank has had the Knosys KnowledgeIQ system implement for its Australian operations for over 10 years. ANZ Bank New Zealand is already a prominent user of the KnowledgeIQ solution provided at ANZ Group level, with 6,000 licensed users in NZ.

The contract with Knosys will migrate ANZ's data to Knosys' KnowledgeIQ system. The contract is expected to continue for nine months and will generate approximately NZ$840,000 in project fees for Knosys.

The new contract with ANZ will seek to ensure a primary stipulation of the BS11 regulation – that there is 'no possibility' that a transaction could be permanently lost and that the switch to back-up systems must take effect within 4 – 6 hours in certain circumstances, according to New Zealand law firm Minter Ellison Rudd Watts

Shine Lawyers Transforms Client Onboarding

Shine Lawyers, an Australian law firm that specializes in class action and civil damages lawsuits, has implemented K2's intelligent process automation platform with UiPath's robotic process automation, to help the law firm drive operational efficiencies, reduce costs, and transform the client experience.

Shine was focused on reducing legal complexity and wanted to find a way to simplify its client on-boarding process. Originally, every potential new client was taken through a manual Q&A process via the call centre, to gauge whether they had a viable lawsuit.

These Q&As often took the better part of 30 minutes – which was a substantial time commitment, given that this was not necessarily time the firm could bill for. First, not all inquiries lead to viable cases; and second, Shine offers all services on a no-win, no-fee basis, which means the more time they spent vetting leads, the more it cost the firm.

"We are in an industry that is very traditional in its approach to day-to-day work. There is a significant time burden driven by all of the paper-based processes," said Luiz de Almeida, CIO at Shine Lawyers.

"We dared to be different and swept the globe looking for partners who could help us disrupt the legal industry. We knew we had something when we discovered the true power of intelligent process automation and the impact it can have on delivering powerful client experiences."

By leveraging K2 and UiPath, Shine was able to automate the initial customer experience and dramatically reduce the amount of manual work involved in the new client inquiry and onboarding process.

Additionally, there's no need for legal professionals to get involved until an appointment is booked at which point the lawyer receives comprehensive and up-to-date information on the case. Within the first 8 weeks, the new online client inquiry and onboarding process delivered $290K (AUD) in new customer bookings.

"The digital disruption that is happening in the legal industry is well underway and we are seeing firms like Shine Lawyers increasingly look for ways to better achieve their business outcomes through digital innovation," said Burley Kawasaki, chief product officer, K2. "We are excited to help Shine effectively transform and automate their business processes to deliver a more customer-centric approach, which has helped them grow their new business and streamlined its new client onboarding process."

Shine is currently working on several initiatives that leverage its K2 intelligent process automation, with the goal of delivering end-to-end automation across every line-of-business. To learn more, watch the Shine Lawyers on-demand session from FastFWD, K2's virtual conference or read the case study.

Waikato Council adopts OpenText

Waikato Regional Council of New Zealand has implemented OpenText Content Suite and OpenText Core Share to provide secure collaboration and mobility, while supporting regulatory compliance and the proper retention and disposition of records.

The Waikato Regional Council (WRC) manages the region's natural resources, including water, soil, air, geothermal areas and coasts. The WRC processes a high volume of project planning documents, environmental reports, contracts and technical specifications, all subject to public records legislation.

Working with OpenText Professional Services, the WRC upgraded to OpenText Content Suite to manage and govern critical business information and improve the user experience. The Council can easily search and access the right information at the right time, enabling faster and better decision making.

They also added OpenText Core Share, to extend collaboration outside of the organization with its partners and contractors, while offering enterprise-grade security and helping maintain compliance.

"The OpenText content services platform has improved functionality and offers users a better experience and more options. We have the right information at the right time to make the right decision," said Joanne Bell, Information Management Team Lead at WRC.

"The ability to share information directly from Content Suite using Core Share with our external contractors has been really valuable. With Core Share we can see when external people have viewed documents and what they have done. It gives us much better visibility on who is using our information and how."

With OpenText Content Server Mobile, WRC has also enabled its field workers to view and interact with content in Content Suite from their mobile device, so they can stay connected and productive when working remotely. More than 600 professionals working across departments and in the field at WRC, as well as external partners and contractors, can access up-to-date information with increased visibility.

A Startup Vision for AI-as-a-Service

Almost two years since the launch of the Sydney start-up, IDM asked Sypht CEO Warren Billington to outline the growth and development of the company's cloud-based AI-as-a-Service platform for data capture. Sypht has established a proprietary SaaS platform on the Amazon Cloud that uses Google Vision OCR, machine learning and natural language processing that instantly and accurately extracts and interprets valuable information from unstructured data in documents used in everyday business processes.

IDM: Warren, what has Sypht been focusing on for the past 12 months?

WB: We started very much as a team that evolved out of BCG Digital Ventures, driven by our parent company the BPAY Group, with a core engineering and data science group of 10. We've now almost doubled our staff and have increased the data science team to five people, which is a considerable investment from us, but, indicative of the demand we're seeing in market across a whole variety of different document types and use cases and as we continue to innovate around the product.

We've also become much more of a commercially oriented business, so building out our sales, customer success and marketing capabilities has also been a focus this year.

IDM: Where is Sypht being deployed in the market today?

WB: One of our early wins was at Australian SMB accounts specialist MYOB. We are working behind the scenes to process a huge range of invoices and other documents submitted online by MYOB users.

We have now processed over 22 million documents at a median of five seconds per document with accuracy over 90%.

Since we commenced working with MYOB in 2019, we've actually seen incremental gains as it relates to accuracy which is a testament to the self-learning capability we have built in to Sypht. The more data that we process over time the more we have been able to improve in performance for MYOB.

Another large customer is a major Californian energy utility that is using Sypht to clear a significant backlog of manual documentation and processing in the field.

For them the challenge was to digitise inspection reports that thousands of contractors would have to complete.

They need to be able to process that information quickly to ensure they are meeting obligations and requirements around compliance. We've been able to address that by reducing report processing time from 4 years and automate the entire process within 3-4 weeks.

We have also had success with one of the organisations within the NDIS space, My Plan Manager These organisations have to deal with a huge variety of documents submitted as part of NDIS claims processing.

There is also strong demand around identity verification in government and in lending use cases, for example where multiple documents are required for income and identity verification.

Another area that is starting to look really quite promising is around property, with document types such as leases and contracts. The market is really starting to evolve across multiple verticals.

IDM: How is the Sypht platform evolving?

WB: Sypht is really focused around data capture but we're now seeing an opportunity to overlay value added services.

Once you've captured data, then there is the opportunity to be able to plug Sypht directly into downstream or upstream systems which allows more end-to-end automation of workflow and straight-through processing through Sypht Connect.

Another new product that we are launching is called Sypht Signals. This enables organisations to set-up signals around key events and triggers for real-time detection and freely search structured data post-extraction to discover insights creates such as detecting fraud as it relates to invoices and claims processing.

Another tool we have developed but are yet to commercialise is called Sypht Validate, which will help organisations review data in a UI where AI confidence levels can be set at thresholds to either confirm predictions as true or annotate the correct values so the AI continuously improves allowing organisations to augment their human workforce with intelligent automation.

As we start to build more capabilities around new document types and new use cases, these will be developed as AI and Insight products that can then be commercialized more broadly into market.

I think the big shift for us is repositioning Sypht from just a single product with an API to an "AI as a Service" platform with multiple products into market.

IDM: Is the Machine Learning technology that Sypht applies only of use to organisations that are processing millions of documents? What about the SMB sector with much lower volumes?

WB: One of the key value propositions that we believe is really differentiating Sypht is around our adaptiveness across many business units, industry use cases and document types for rapid scale.

Our ability to build self-learning algorithms and model capability powered by Sypht's global data network effect can be done from a very low sample of documents.

"We've now almost doubled our staff and have increased the data science team to five people, which is a considerable investment from us, but, indicative of the demand we're seeing in market across a whole variety of different document types and use cases and as we continue to innovate around the product." - Warren Billington, CEO, Sypht

So, when we work with a new customer, we need no more than a couple of hundred documents to then be able to build a model that delivers strong performance. And we believe that is really differentiating for us.

The whole notion that you need large volumes of data to get to those performance levels is not the case. We use a lean model development process and can build self-learning AI models within three to four weeks that allows us to rapidly mobilize a proof of concept with a minimal effort to deploy and integrate and then prove the value very quickly.

IDM: Has COVID-19 impacted this market in a significant way?

WB: It's having a big impact. It's clear that organizations now want to move more quickly on digital transformation and there is a growing appetite to be able to introduce AI based automation or cloud based technologies. But people also want to be able to move quickly and be able to prove value and ROI.

Sypht can take a low sample of data and get a POC up and running within three to four weeks to prove value that then provides the business case for further investment and the roadmap for future use cases for unstructured data.

There's very much a focus from businesses on short term projects that deliver immediate ROI, rather than committing to long term strategic consulting- driven transformation projects

https://www.sypht.com/

The State of Process Mining and RPA

A new Global survey has found that process knowledge is the primary success factor for robotic process automation (RPA) projects, yet only 31% of US organizations are currently using process mining tools to understand their processes. The importance of a process-first approach is growing, according to the State of Process Mining and Robotic Process Automation survey conducted among 400 senior decision makers in the US, UK, France and Germany.

The global survey was sponsored by ABBYY and executed by Opinium Research in March 2020 with organizations across healthcare, financial services, logistics and transportation, and government.

Process mining is becoming a critical component of automation efforts with 42% of US respondents saying they are in early stages or considering adopting process mining platforms, while 31% are already using these tools. Furthermore, 41% believe these solutions would be helpful for understanding how their business processes worked, with organizations also seeing the value of process mining for real-time performance updates (43%) and analysing behaviours to improve processes (39%).

The survey also revealed that while some (29%) US organizations strictly follow process rules, most (60%) said there are exceptions and deviations to successfully complete processes. The most popular reason why processes were not always strictly followed was that employees may deviate to meet customer needs (58%). This points to the growing need for more advanced process mining solutions capable of tracking, analysing and predicting varied, ad hoc processes in realtime.

Decision makers in the US credited three success factors for RPA initiatives with a strong understanding of business processes automated as the top factor (70%), followed by advanced planning (63%), and having a simple workflow to automate (50%). Conversely, the two leading factors causing RPA project failures were the complexity of projects (57%) and not fully understanding the intended automated process (39%).

"There is a direct relation to RPA project failure and not adequately understanding business process workflows and how they may deviate," commented Scott Opitz, Chief Marketing Officer at ABBYY.

"It's becoming clearer to organizations that process knowledge is fundamental for successful automation initiatives. More advanced process mining tools are required to offer real-time visualization of bottlenecks, analysis of how various process execution patterns impact costs, and alerts to proactively notify staff if something is occurring or perhaps not occurring.

The global survey also highlighted that RPA and process mining are no longer used for simply automating administrative tasks and are now moving towards higher value, enterprise-wide automation for augmenting human intelligence in more business-critical functions.

For example, US decision makers believe RPA will be most valuable for improving the customer experience (40%) and financial planning and decision making (38%).

Download the State of Process Mining and Robotic Process Automation 2020 global report at https://abbyy.com/ solutions/process-intelligence/research-report-2020/.

Toyota Finance NZ drives automation

New Zealand's largest captive finance company, Toyota Finance New Zealand, has implementing intelligent automation in its local operations using the UiPath RPA platform. TFNZ provides products and services, including consumer and small-business vehicle financing, vehicle leasing, and corporate fleet management services. Recently TFNZ added car-share subscription services to their portfolio.

An initial Opportunity Assessment exercise involving NZ solution provider Quanton and members from TFNZ customer services and fleet sales teams identified over 39,000 hours of potential benefit from automation and helped drive early engagement within the business.

After delivering a pilot in 90-days, TFNZ has automated over 15 processes using UiPath RPA platform, reaping the benefits and giving almost 2,000 hours back to the business in 2019, while projecting a further 4,500 hours back to the business this year.

A second UiPath software robot went live just before Christmas 2019, providing over 8,000 annual hours of additional automation processing capacity to the fleet team managing their rental portfolio.

Anita Hogan, TFNZ Applications Manager, said "In terms of our operational strategy, we have a global strategic directive to increase the efficiency of operations as well as digitising the entire customer experience.

"We needed to streamline and refine these processes while also planning for - and building - our future capabilities.

"The fintech industry has made significant inroads in New Zealand over the past few years – customers now expect to be able to apply for finance online with a few clicks and receive funds within hours, or maybe even minutes.

"Fintech organisations are setting the gold standard in terms of slick, digitised customer experiences, and we need to make sure we can keep up with that speed of change," said Hogan.

Russell Berg, Quanton's General Manager for Product and Emerging Technology, says automation within TFNZ isn't just about cost savings, with the very real potential for automation for cost avoidance and risk mitigation.

"One area with a big benefit is a process involving health and safety. Basically, with a leased vehicle if a driver doesn't bring it in for scheduled servicing, the lease company needs to be notified, because this is now a health and safety issue. It's an important area, because if that car is involved in an accident and the accident is found to have been caused by something that could have been prevented - say replacing the brake pads for example - the lease company could be liable.

"TFNZ shared with us that there is already one case in New Zealand that has gone to court with this exact scenario, and it had serious ramifications for the lease provider."

While TFNZ haven't yet automated that process, Russell says it highlights the potential for cost avoidance and risk mitigation using automation. "There's no possible way to do that sustainably without automation."

New report sheds light on compliance

Australian companies mustn't take their eye off compliance even amid a global crisis, says new industry report released by Australian technology services firm, TAS. TAS' fourth annual *Compliance Index, Change, Complexity and Current State of Play,* finds that compliance, along with security breaches, are the top two significant risks facing businesses.

The Index's findings suggest that business leaders still have work to do when it comes to ensuring effective compliance management. Despite growing awareness of compliance within Australian boardrooms, leaders are grappling with 'how' to foster a compliance-first culture in the workplace.

Over a quarter of survey respondents have either no knowledge or only a basic level of understanding of compliance obligations. Further, 64 per cent of Index participants estimate that staff spend as little as 0 and 2 days on training annually, potentially exposing companies and customers to increased risk from lack of knowledge and skills.

According to the findings, some of the most significant challenges leaders face are constraints in resources, skills capability and a lack of strategic partnerships. This builds on the findings from 2019's Index highlighting the existence of the same barriers and continuing trend non-effective compliance management.   At the same time, the Index found that leaders are still not considering strategic partnerships with RegTechs to address those barriers. While most organisations have worked with an external partner at some point to identify their compliance obligations or assist in some way, very few are actively engaging partners to manage their end-to-end compliance obligations, and many organisations have done neither.

Julian Fenwick, Founding Director, the RegTech Association commented, "While Australian RegTech solutions are viewed as some of the best in the world, leaders should put aside their risk-averse tendencies and seek partnerships. Leaders should empower all staff with both training and tools to be responsible for compliance and work strategically with the right solutions and RegTech partners to achieve compliance. By championing a compliance-first culture, organisations can meet their obligations."

A full copy of the 2020 report is available at http://tas. business/work/the-compliance-index/.

COVID-19 Digital Dashboard

Number of COVID-19 Daily Cases by Region Identifier over time

A count of the total number of confirmed COVID-19 daily cases that are required to be reported in accordance with public health legislation.
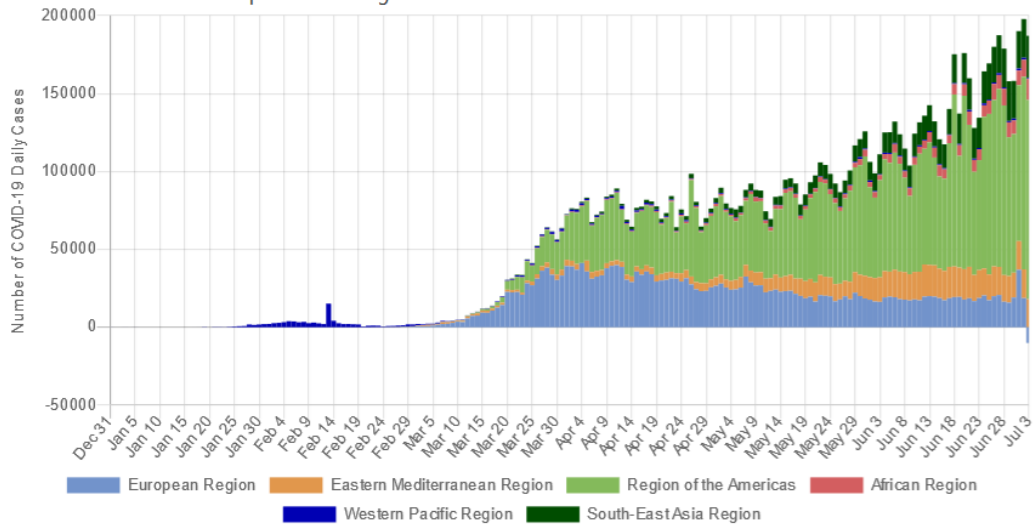
Select data to display
- ◉ Number of COVID-19 Daily Cases
- ○ Number of COVID-19 Cumulative Cases
- ○ Number of COVID-19 Daily Deaths
- ○ Number of COVID-19 Cumulative Deaths
- ○ Number of COVID-19 Weekly Cases
- ○ Number of Days Since Last COVID-19 Case

Choose a category data element
- ◉ Region Identifier
- ○ Transmission classification

By Samuel Spencer

To help people understand the flood of data being published about the current COVID-19 Pandemic, Aristotle Cloud Services Australia has created a metadata-driven dashboard that shows definitions, business glossary and data lineage directly alongside the data.

The metadata-driven COVID-19 Dashboard is also the first project of Aristotle Labs - a site where we can explore and experiment with new ways metadata can be used to improve how people understand and interact with data.

Making metadata visual and exciting is one important way of showing how data management isn't just about record-keeping and governance, but also a key part of data communication.

We at Aristotle Cloud Services feel strongly about the importance of metadata as a way of recording business knowledge. Metadata is the backbone of how we work with data, making sure whenever data is used it can be understood and used effectively.

Part of sharing this enthusiasm is making sure that people can see how enterprise systems like the Aristotle Metadata Registry can be used to in innovative ways to make metadata more accessible to systems and to the people that use them.

This is why we've launched Aristotle Labs - a site where we can demonstrate new ways to use metadata to improve how people understand and interact with data. Aristotle Labs sits separate to the Aristotle Metadata Registry and is a place where we can explore and experiment with ways to make metadata more exciting and accessible and test new ideas, while also keeping our core products stable.

The Aristotle COVID-19 Dashboard provides an interactive display of data about the 2020 COVID-19 pandemic using data published by the European Centre for Disease Control.

Like many data dashboards, ours presents data about the current 2020 COVID-19 pandemic as either a graph

or a map. However, our data dashboard also includes a number of metadata-based enancements from our demonstration Aristotle Metadata Registry to give more context to the data. This includes metadata-driven generation of the interface and data selectors and automated discovery of the data files needed for the dashboard.

We examined World Health Organisation Situation Reports and case collection forms to gather details on how data about COVID-19 was collected and aggregated by the World Health Organisation before the data was published and entered this information into an Aristotle Metadata Registry to make the information available online in a central location.

The dashboard also includes a data lineage display that shows how data was collected by the World Health Organisation and how it was transformed before being made available. This diagram is dynamically updated based on the selected data and gives users of the data better context about where it came from and how it was collected. By making this data lineage information available in an interactive way we can show how metadata plays an important role in data literacy."

The dashboard also includes an interactive map that shows this data and metadata to help visualise the spread of COVID-19 across time to help people visualise the data and understand the impact across the globe.

These graphs are designed to display metadata to show important information about how the data is stored, including definitions codes and classifications, data types and business terminology. This metadata gives people the necessary details to accurately interpret data and without it, it can be difficult to determine what data means and where it has come from.

Throughout the year, along with our regular releases of new features from the Aristotle Product Roadmap we'll be adding more projects to our labs to showcase more examples of how metadata can power interactive graphics, improve understanding and make metadata and exciting part of data management.

Samuel Spencer is Co-founder & CEO of Aristotle Cloud Services Australia.

10 Things to Consider when setting up a Digital Mail Room

by Daniel Warren-Smith

Digital Mailrooms are not new – they have been around for over 30 years, since the earliest days of industrial document scanners. Despite a shift away from paper correspondence, Digital Mailrooms remain an essential part of the Digital Transformation toolkit.

However,to maximise the benefits of a Digital Mailroom the mindset needs to be more than just purchasing high end scanners, putting them in the basement with the old mailroom, and taking a photo of every piece of paper as it enters the organisation.

While personal email is automatically directed to personal inboxes, many organisation use generic email boxes to receive electronic correspondence from external parties.

The principles of Digital Mailrooms apply equally to these generic email boxes – receiving emails or customer applications via electronically via email doesnt represent digital transformation!

Here are ten things to consider when establishing your Digital Mailroom.

1. Have somewhere for digital mail to go

This sounds obvious, but if the answer is into someone's email box, or into a folder in a fileshare system, then you've just wasted your investment. Digital documents need to be stored and filed in a digital system – just the same way you do with paper.

Directing digital versions of your inbound mail to either an email box or a fileshare is not Digital Transformation – this is just digitalising an analogue process, layering additional cost without any of the real benefits. Digital mail needs to be identified with metadata, stored securely with access limited to authorised employees only, and retained for the appropriate length of time.

You may also choose to use a digital workflow system to route documents through all the workflow steps, and then archiving the record.

2.Set up a master document classification system.

You might choose to follow the disciplines of formal records management, with a company-wide taxonomy, or you may choose to take a broad brush and simply categorise documents by department. The important thing is to have a series of "buckets" to classify your documents. Document classification is key within digital transformation as it enables records to be directed to the appropriate workflows, and then archived appropriately.

3.Enrich your images with data.

Large volumes of untagged, uniquely numbered pdf documents sitting on a server are only marginally more useful to your business than a sack of unopened physical mail. With a master document classification system, you can establish key pieces of metadata you want to capture for each type of correspondence which means you can identify images, automatically direct them down specific workflows, and also decide how long you need to retain them.

For example, for invoices, you should capture at least invoice number, vendor, date. For new customer applications, you would likely capture date, customer name, customer number. The metadata profile will be different for each document type, and the data captured at this stage can be ingested into ERP systems.

4.Decide on your operating model:

Outsource, centralised, or federated-distributed; paper, electronic, hybrid mail types.

■**Outsourced:** Under an outsourced model, all physical mail is directed to a dedicated locked box at the post office, from whence it is collected daily by your outsource partner, opened, and scanned. The physical is then retained for a period of time to allow for any quality issues, and then securely destroyed (generally 30-60 days). Turn around times can be from a few hours, up to 48 hours, depending on your contracted service levels. With an outsourced partner, you leverage the scale of hardware investment and the know how of your outsource partner. Your outsourced partner will have processing options for physical mail, as well as inbound facsimile and electronic (email) documents.

■**Centralised:** Under this model, you will set up a centralised digital mailroom, with investment in scanners and imaging software to process all inbound documents. Physical mail is delivered daily (or sometimes twice daily), and then opened and scanned. All emails to generic email boxes and facsimiles should also be processed by this central team to ensure they . Urgent documents may be hand delivered to the mailroom, and can be processed with priority,

■**Distributed / Federated model:** With distributed capture, you enable multiple input sources for physical records, but centralise the processing of these records. You can utilise multifunction device scanners, or smaller desktop scanners distributed throughout the organisation.

5. Think Automation first.

Automate the document supply chain – at a high level, classify document sets by receiving channel (PO Box, email address), and then use Smart Capture tool such as Ephesoft Transact to recognise and automatically identify document types and extract metadata.

6. Think Automation second.

The reason you started down a digital mailroom path is as part of a digital transformation initiative. Don't fall into the trap of simply digitalising your analogue process. Digital transformation is more than just transferring your old process into an expensive workflow system and buying . Smart Capture software can automatically classify inbound documents, and extract relevant data.

Robotic Process Automation tools can take an inbound document and route it through your workflow, enabling true straight through processing. For example, RPA tools can route invoices through an approval workflow, or set up customer accounts from executed agreements, or set up new employees within payroll, HR and training systems based on receipt of signed employee agreements.

RPA can also assist with taking data from web or mobile platforms and pushing it into the various enterprise systems to kick off subsequent workflows.

7. Model your volumes, and map out the timings of your process.

Model for peak loads, and 2x, 5x, & 10x increase in volumes. How long will it take the team to open the mail, then prepare and scan, and then process through the recognition / data capture stages.

If you are moving large amounts of data, model how long this takes to get through "the pipe" – from your scanning location through to the final resting point – bearing in mind that one A4 page equates to approximately 140kB of data.

Model your process with parallel processing – not just sequential. For example, you don't need to complete all mail opening before starting scanning – you might process in batches of 50 items, so that scanning can start before all of the document preparation is completed.

Similarly, batch processing enables your data transfer to be drip fed, rather than waiting till end of day to transfer bulk volumes of data.

8. Plan for Return-To-Sender (RTS) mail and non-scannable items.

RTS means something went wrong on the outbound customer communication process, and you will need to update your customer details. Plan upfront for a triage process for RTS mail.

The optimal solution is to out-sort RTS items, scan and capture the customer details and direct the data stream to a separate customer database management team who can update details. You should also have a plan for non scannable items (eg product returns) – where should these be directed, or disposed of.

9. Maintain your Document Supply Chain.

Any system with moving parts needs maintenance, and your digital mailroom is no different. Measure the efficiency of your document classification engine and establish a continuous improvement programme to increase automation.

Track the productivity of your scanning team – pages per hour. Maintain your scanners – we recommend daily / weekly cleaning checks, and an annual maintenance visit from your hardware provider.

Review your document classification scheme to check it still matches your business requirements. Do a sweep of your office – who is hoarding either paper or digital documents that should have been processed through the digital mailroom?

Run high level compliance checks – if you set up 50 new customers last month in your ERP, is this reflected by 50 new contracts in your document repository?

10. Plan for multiple copies of the same document.

Unless you have a fully paperless environment, you will inevitably end up with multiple copies of the same record – sometimes a paper copy along with a digital, or sometimes multiple digital copies. Which version is the original?

If you have a scanned customer contract, sent in by your sales team to expedite the customer set up, and then the physical version follows a week later, which version do you keep?

Your document management system needs to consider multiple versions, and formats of records. By capturing metadata at the digital mailroom stage, you can identify these multiple versions up front, and automatically process rather than arhive multiple versions of the same record, or process the same record through your workflow

Leveraging 18 years experience in Information Management, Daniel Warren-Smith founded consulting form 24PC in 2020 to help organisations optimise, digitise and automate document centric business processes using best in breed software across Capture, Robotic Process Automation, Workflow and Enterprise Content Management platforms. If you would like advice on establishing a digital mailroom, or are not convinced you are achieving maximum benefits from your current Digitisation programme, contact 24PC at info@24pc.com.au for a free Digital Assessment.

Microsoft 365 launches new Records Solution

Microsoft has announced the general availability of Records Management in Microsoft 365 (formerly known as Office365) for "Eligible Microsoft 365 E5 customers", a new tool to help businesses protect and manage sensitive data. E5 is the top tier and highest priced enterprise level of Microsoft 365

While all Microsoft 365 users will see the Records Management tool in the Microsoft 365 compliance center, this will change according to release notes.

"At this time any customer will be able to see the solution even if you're not licensed for it, although not all functionality will work as expected. In the near future, this will change, and you won't be able to see records management options if you're not appropriately licensed."

The new Records Management solution differs solution different from SharePoint's in-place records management or records center.

"This solution is our next evolution in providing Microsoft 365 customers with records management scenarios. It uses a different underlying technology than our legacy functionality in SharePoint, and also goes across Microsoft 365 beyond just SharePoint. This new solution is where our future investments in records management will be made," Microsoft states.

The new tool promises the ability to:

■ Classify, retain, review, dispose, and manage content without compromising productivity or data security

■ Leverage machine learning capabilities to identify and classify regulatory, legal, and business critical records at scale

■ Demonstrate compliance with regulations through defensible audit trails and proof of destruction

A Harvard Business Review research report, commissioned by Microsoft, found 77% of organizations believe an effective security, risk, and compliance strategy is essential, but 61% face challenges in creating one. More than half (53%) have not developed a strong, business-wide data governance approach. The majority (82%) say protecting information has grown increasingly difficult due to new risks and complexities.

"With many employees working remotely right now, one of the things we hear is security and risk management are arguably more important than ever," says Alym Rayani, senior director at Microsoft 365. The HBR survey was conducted before the coronavirus pandemic, he notes, but its data is just as important at a time when businesses are relying on remote employees.

A higher volume of information, transmitted through and stored in multiple collaboration systems, drives complexity for managing records with cost and risk implications. Companies facing increasing regulations often move data into different systems of record to comply. This can increase the risk of missing records or not properly declaring them, he says in a blog post.

The records-management solution supports the following elements:

■ Label content as a record. Create and publish retention labels that declare content as a record that can then be applied by end users or auto-applied by identifying sensitive information, keywords, or content types.

■ Migrate and manage your retention plan with file plan and use file plan manager to bring in your existing retention plan, or build new with file descriptors and expanding hierarchies.

■ Establish retention and deletion policies. Define retention and disposition periods based on various factors that include the date last modified or created.

■ Trigger event-based retention with event-based retention.

■ Review and validate disposition with disposition reviews and proof of records deletion.

■ Export information about all disposed items with the export option.

■ Set specific permissions for records manager functions in your organization to have the right access.

DocsCorp free apps during COVID-19

To ensure businesses can continue to operate during the COVID-19 lockdown, DocsCorp is making compareDocs cloud and cleanDocs server available for 90 days to those working from home. These applications are designed for mobile and remote workers. They can operate as standalone solutions for new users, or alongside desktop modules for existing users.

Using compareDocs cloud and cleanDocs server, remote teams can continue to:

■ Compare contracts and complex documents quickly on any device – including Mac, iPad, and tablet

■ Review and approve documents anywhere

■ Remove sensitive metadata from email attachments sent from any device

Users will be able to compare two versions of a document on Office 365 for Windows, Mac, iPad, or in the browser. For existing compareDocs desktop users, the cloud Add-in will ensure accurate comparison is accessible in Microsoft Word on any device – including Mac and iPad – while staff work remotely.

cleanDocs server protects email users from inadvertent data leaks by sanitizing email attachments of sensitive metadata.

Emails sent from mobile devices or the browser can be automatically cleaned based on company policies, requiring no input from the user.

For current cleanDocs desktop users, cleanDocs server will operate in tandem to protect mobile users or those emailing from the browser. cleanDocs server ignores emails already cleaned on the desktop, focusing only on those sent from other channels.

Individual users can install the compareDocs cloud Add-in directly from Microsoft Word on Windows, Mac, iPad, and Word Online. Download the Quick Reference Guide to installing and deploying the Add-in here. I

f cloud comparison would benefit multiple departments or your whole organization, DocsCorp can issue you an enterprise trial license. Email sales@docscorp.com to get set up.

If you would prefer compareDocs cloud to appear directly in your DMS context menus, contact us for more information on this.

Register your interest in cleanDocs server HERE.

Metadata for Microsoft Teams and SharePoint Online

By Atle Skjekkeland

I still meet now and then IT managers that don't get the value of using metadata to manage unstructured content such as text documents, images, and video. They claim metadata is the old approach, and the new approach is using search with machine learning and artificial intelligence to manage unstructured content.

In iTunes, how would you find Rock'n Roll songs from the 70s, but not 80s, without metadata? You could search for song title and artist, but you would then only find the song. You could search for Rock'n Roll, but you would without metadata only find songs with this in the title. Metadata is key to finding the music you want, - this could genre, artist, composer, etc.

It's the same for Office 365. You get some out-of-the-box metadata such as author, date, and file format, but you will NOT be able to identify business area, country, process, information type, etc. without the use of metadata. Metadata helps you search and find the information you are looking for (e.g. business unit, process, country), but also manage this over time (e.g. retention, access). Machine learning and artificial intelligence will help you extract and apply metadata, but you still need metadata with master-lists of business area, process, information type, etc.

If you have a corporate metadata model, then you have a standard way to describe unstructured information. If you want to improve findability, but also break down information silos, then the metadata values should be standardized using master data sources or controlled vocabularies (see below image).

Metadata is an investment in the future findability of information. The more you invest time in developing the information, the more important it is to ensure you and your colleagues can find and reuse the information. You need therefore metadata to manage unstructured information, but you may leverage machine learning and artificial intelligence to extract and apply metadata (often called entity extraction).

Metadata is key to automating records management with SharePoint Online and Record Labels**.** Office 365 can be set up to auto-apply a record label based on metadata. If users classify a document as an HR file and set document status to final, then this can be automatically declared as a record based on the metadata. Document type can be a mandatory

metadata field, which also help users to search and find different types of information. Document status can be draft by default, and changing it to final will help users search and find draft vs final information.

Success is always 80% about people, 15% about process, and 5% about the technology. Metadata for Teams and SharePoint Online has to be of value to users. They have to see the value of it, - and it should not require them to manually add a lot metadata. The key to this is automation, e.g. information automatically inherent metadata based on storage location. Don´t force users to add them all.

How do you implement metadata for Teams and SharePoint Online?

When you create Teams, Planner, Yammer, and Stream, a SharePoint Online site is automatically created to store files. Teams now support metadata, - users can can see SharePoint metadata directly in the Teams client. Here are the high-level steps to implement metadata for Teams and SharePoint Online to improve search and automate records management.

Step 1: Establish a corporate metadata model with master data sources

Determine what metadata you need to find and manage the information. Some metadata may be mandatory for all Office 365 sites, like business area, country, and process area. Others may be optional like facility, department, product, employee number, etc. Identify possible master-data sources for each metadata element, e.g. list of all facilities. Standardizing the metadata elements AND values will make it easier to identify and manage **information across sites.**

Step 2: Connect SharePoint Term Store with master data sources

Use standard APIs to connect SharePoint metadata store with your master data sources. If this is not possible, you then have to establish a process to upload the lists to the SharePoint term store on a regular basis.

Step 3: Site Configuration/Site Provisioning to set default metadata on new sites

When new SharePoint Online sites are created manually, or automatically when creating Teams, Planner, Yammer, and Stream, you want to ensure these sites get the relevant default metadata. All information stored on the site will then automatically inherent the metadata, which will improve search and allow you to automate records management with

SharePoint Online. Two ways to achieve this:

■ Option A: Site provisioning with a central service that set up the site with content type for users with relevant metadata.

■ Option B: Self-service site configuration with content type that forces site creators to pick and set relevant default metadata. This could be done using out-of-the-box SharePoint Site Design with Logic App.

Users are then empowered to create Teams and SharePoint sites with the required default metadata. This makes it possible to search for information per business area, country, etc. Records management with SharePoint Online may be set up to be automatic based on mandatory metadata, e.g. document type (e.g. HR file) and document status (draft vs final). The site configuration/provisioning should also include a site directory to make it easier to track site owners and purpose, e.g. what metadata has been set on sites.

Step 4: Get metadata on pre-existing SharePoint Online sites.

Develop and run scripts to set metadata on pre-existing sites and documents. This means all your sites will have governance, not only the new sites created with the new site configuration/site provisioning.

Step 5: Configure corporate and site search to show metadata as progressive filters

Metadata on documents will now make it a lot easier to find information in Office 365 based on business area, country, process, document type, document status, etc. Basic search can show metadata as progressive filters on the search result page, and advanced search can allow users to search only using metadata.

Step 6: Establish communication and training resources

Get business leaders to communicate the value of this to staff and create simple 2-minute videos explaining how to create a site, how to classify information, how to find information, how to archive information. All communication and training should start with the WHY. Explain first the benefit, then how to do it.

Step 7: Establish roles and responsibilities for ongoing improvement

The business will always change, and so will the requirements for new metadata elements and values. Establish therefore processes with roles and responsibilities for ensuring new or incorrect metadata can be quickly added or corrected.

This approach creates value to the business and users. It will make it easier for them to search and find information with automated records management with SharePoint Online and Record Labels. Site creators set the default metadata for sites that information automatically inherent when being stored on sites. Users only select document type (unless also set as default on site) and changes document status to final (unless set default on folder, e.g. Final Reports) to automate records management with SharePoint Online.

Feel free to contact us if you need help implementing metadata in Office 365 to improve search or to automate records management with SharePoint Online.

Atle Skjekkeland is CEO of Infotechtion is a vendor-independent boutique consulting firm specializing in improving and automating information protection and governance in Office 365 and beyond.

RecordPoint calls up an Aussie icon

RecordPoint has adopted the Blue Heeler, the most iconic of Australian canines, as part of a "brand refresh" that includes a new logo featuring a map of Australia, where the product was launched in 2009. Now headquartered in Seattle, Washington, RecordPoint is a global player in the SaaS Information Governance market.

The Blue Heeler is a breed famous for its legendary intelligence and loyalty, values that have inspired the choice as a new digital identity for RecordPoint.

The company says the new logo represents its dedication and loyalty to its customers, and also signifies the proprietary layer of intelligence it applies to the management of in-place content.

Anthony Woodward, RecordPoint Chief Technology Officer, said, "The refreshed brand better exemplifies our drive and commitment to continuously deliver transformative technologies to market.

"Our service has grown so much, and our refreshed brand now captures that evolution and the resulting transparent layer of intelligence no other solution can offer."

"Our established leadership in scalable policy application for content and records is why we are entrusted to protect over $US100B in customer assets. To build on that momentum, we have refreshed our brand and messaging to better convey our expanded offering and entice new customers in growing markets".

RecordPoint promises the ability to deliver complete insight and control over all in-place data, records, and content, enabling organizations to increase compliance, drive collaboration, and reduce costs. Regulated companies and government agencies find it challenging to meet strict compliance requirements when information is spread across multiple systems and locations.

The new visual identity aims to highlight the deeper product features and functionality that have been recently added to the Company's service, which include robust machine learning capabilities and more connectors that enable customers to extend information governance to their most popular business systems

https://www.recordpoint.com/

DocuSign Fuji Xerox APAC partnership

Fuji Xerox has extended its business automation solution offerings with a new DocuSign partnership. This will see Fuji Xerox bring eSignature and Contract Lifecycle Management solutions to the APAC market.

Through the partnership, Fuji Xerox will be responsible for direct sales and implementation services for the region.

DocuSign's Contract Lifecycle Management solution digitises the different stages of contract execution, including before and after signing.

According to the company, it offers a flexible and configurable workflow that automates different agreement processes and can be used to create a cloud-based platform for business processes.

eSignature and Contract Lifecycle Management solutions can be used together to efficiently work through contract approvals with encrypted and secure digital signing. In addition, it provides track changes functionality, reducing reliance on email communications and the associated risks of managing negotiations and contracts across multiple channels, DocuSign states.

When compared to manual processes, the digitised solutions offer reduced legal costs, location flexibility, contract renewal, reduced paper waste and improved overviews of current and past contract agreements, according to the company.

By leveraging eSignature software, businesses can achieve up to 55-78.62% in total savings, Fuji Xerox states. Modern enterprise-grade Contract Lifecycle Management has also emerged as a priority for businesses, and effective contract management is important to the commercial success of any business, according to Gartner.

FileBound Australia ISO 27001:2013 Certified

FileBound Australia has received certification for the ISO 27001:2013 Information Security Management System. This certification was completed by Compass Assurance Services and ensures that the company has established a formal set of policies, procedures, processes, and systems that manage information risks for the receipt, transformation, storage and processing of electronic documents and data in the FileBound Australia cloud environment according to the associated statement of applicability.

"Receiving the ISO 27001 certification demonstrates to our customers and partners that FileBound Australia is serious about the security and protection of their valuable documents and data," said Lee Bourke, Chief Executive Officer at FileBound Australia.

"Furthermore, it indicates that we have a mature, managed, and verifiable approach to information security that encompasses not just risk, but also compliance and governance.

"The implementation of this information security management system, combined with the 2019 migration to our high availability cloud infrastructure within Amazon Web Services, truly gives us a market-leading platform for underpinning the digital transformation of our customers critical work processes."

https://filebound.com.au/

Kodak Alaris selects ACA Pacific for NZ

Kodak Alaris has announced the expansion of its distribution agreement with ACA Pacific. Building on its existing relationship with the value-added specialist IT distributor in Australia, Kodak Alaris has appointed ACA Pacific as its sole distributor in New Zealand.

Esker Accredited for PEPPOL in ANZ

Esker has been certified as a PEPPOL (Pan-European Public Procurement On-Line) Access Point by the Australian Taxation Office (ATO) and the New Zealand Ministry of Business, Innovation and Employment (MBIE). This accreditation enables Esker to send and receive e-invoices to and from all entities using the PEPPOL network.

Australia and New Zealand joined PEPPOL in 2019, an open network that simplifies document exchanges between companies (e.g., invoices, sales orders, etc.) and ensures standardisation of documents and connectivity. It is already used in more than 30 countries and increasingly being adopted worldwide, helping to support international trade.

By leveraging the PEPPOL network to exchange invoices with government agencies (B2G) or other businesses (B2B), companies benefit from faster processing, reduced costs and payment times, fewer errors, and a reliable and secure channel to exchange documents.

The Australian government actively supports small business by offering faster payment times. From 1 January 2020, Australian government agencies began paying e-invoices within five days and paying interest on any late payments. This applies to contracts up to $A1 million where both the buyer and supplier use PEPPOL e-invoicing.

As a certified PEPPOL Access Point, Esker helps businesses send and receive invoices to and from any recipient within the PEPPOL network — Esker's customers are thus deemed "PEPPOL ready." in addition to the benefits mentioned above, businesses using Esker's automation solutions for invoice exchange via PEPPOL benefit from one platform for customer and supplier invoices and are able to:

Send or receive invoices via the PEPPOL network or any other media (e.g., mail, email, fax, etc.)

Handle PDF or other structured data submissions

Get 100% visibility on invoice status

Provide human-readable supplier invoices and integrate invoice data to the customer's ERP system

Ensure invoice validation with approval workflow

"Esker is further reinforcing its commitment to worldwide interoperability by becoming a certified PEPPOL Access Point in Australia and New Zealand," said Jean-Michel Bérard, CEO at Esker.

"Invoices are the cornerstone of any business and advancements in standardisation pave the way for innovations, such as financing the invoicing chain so receivables are collected more quickly."

Visit http://www.esker.com.au/peppol to learn more.

Under the terms of the agreement, ACA Pacific will distribute Kodak Alaris' range of document scanners and imaging software nationwide. The expansion will extend both companies' reach in this important market.

Earlier this year, Kodak Alaris won Keypoint Intelligence – Buyers Lab's 2020 Scanner Line of the Year Award for the fourth time in the past five years.

Alaris has a number of new launches in the pipeline (including next generation INfuse Smart Connected Scanning Solutions) and is looking to leverage ACA Pacific's market reach, customer support and logistics strength to help Value Added Resellers (VARs) in the region grow their businesses.

The decision to extend its partnership with ACA Pacific into New Zealand was an easy choice, according to Angelo Krstevski, General Manager Australia/New Zealand for Alaris, a Kodak Alaris business.

"Our long-standing relationship in Australia has shown that they don't just distribute products. A team of highly trained experts provide a range of customer-centric support services, superior account management, dedicated partner resources and professional services, all of which create and add value to our resellers and our customers' businesses. This strengthened alliance will enable us to better serve our partners and increase our market share in New Zealand."

The move follows the recent appointment of Computergate as Kodak Alaris' Authorised Service Partner. The partnership, which will see Computergate deliver its expert repair and maintenance services to the Kodak Alaris customer base in New Zealand, will play a key role in the company's strategy to strengthen its service and maintenance offerings in New Zealand and expand its

service portfolio. Computergate will fully support ACA Pacific in its new role as sole distributor.

Litera adds Bestpractix

Litera has acquired Bestpractix, in a move which deepens its expertise in contextual, predictive content delivery as part of the drafting lifecycle.

Litera already serves over 90% of the Global 100 and will now look to offer additional value to lawyers at the 15,000 organizations worldwide that rely on the company to support their drafting workflows.

Bestpractix provides law firms and legal departments with an AI-powered contract drafting platform which allows them to accelerate the creation of legal documents.

Using proprietary Natural Language Processing (NLP) and Machine Learning (ML) methods to transform unstructured data into actionable insights, the Bestpractix platform helps lawyers leverage and utilize organizational knowledge with a few clicks in realtime.

By analyzing previously negotiated agreements, the platform can accelerate precedent research and provide lawyers with smart, tailored, and contextual drafting recommendations throughout the contract drafting process.

"The concept of 'smart' documents is one which we've been focused on for some time, and the acquisition of Bestpractix accelerates our plans for delivering a smarter drafting workflow, where technology is complementing the way lawyers work.

"We're very excited about the ways in which we see the Bestpractix technology working with existing and future products", said Avaneesh Marwaha, CEO of Litera.

New wins for Citadel Content Management as a Service (CMaaS)

Campbeltown City Council and Victoria University have signed on to Citadel's cloud-based information management solution, Citadel-IX, featuring the Micro Focus Content Manager (CM) EDRMS.

With more than 39,000 students across 6 campuses and 4500 staff, Victoria University (VU) ICT expenditure exceeds $A47 million annually. Campbelltown City Council (CCC) is NSW Local Government Authority with over 700 staff.

In 2019 a Request for Tender (RFT) was issued by Campbelltown City Council seeking an EDRMS software solution. They required a scalable solution that was mobile-friendly, easily accessible, and provided full integration capabilities with multiple Council systems and business processes. The solution is compliant with The State Records Act 1998 (NSW) and be ISO 27001 (Information Security Management) certified.

In 2019 an RFT was issued by Victoria University to implement a suitable EDRMS to replace an existing record management system and ensure compliance with regulatory and statutory obligations under the Public Record Act 1973. Key requirements of the new solution were to provide University staff with a user-friendly system which can integrate with core University Line of Business applications; streamlining their daily operations in effectively managing and preserving University records.

Both organisations have adopted a "cloud-first" strategy and were seeking to migrate existing information to a secure SaaS solution to replace legacy applications. Each will deploy Citadel-IX through 5-year managed services contracts.

Stewart Hollingdrake, Head of Business Development at The Citadel Group Limited, said, "The Council and University wanted to focus on their business operations and engage a partner that could manage their information effectively in a secure, managed and fully accessible way. The solution being implemented across each site will ensure full records compliance with Service Level Agreements that provide clear, measurable performance indicators."

OpenText Governance for Microsoft Teams

OpenText ECM has added the ability to provide information governance and control for Microsoft Teams, making an expanded set of compliance, records management, and archiving options available to Teams users and administrators.

Extended ECM allows users to surface Teams content in context of relevant business processes across the enterprise, creating links with line-of-business systems and applications such as Salesforce, SAP, or Oracle.

"Microsoft Teams has become critical infrastructure for organisations that have rapidly moved to remote work. As more work moves to digital collaboration environments, integrating Enterprise Content Services into Teams makes it easier to access relevant documents while maintaining information governance and compliance policies," said Lou Blatt, OpenText CMO.

OpenText Extended ECM adds important functionality to Teams. Users can:

- Access and centrally govern customer content within the Teams environment;
- Automate the creation of a Team specific to an OpenText business process;
- Synchronise Teams membership with OpenText content management systems;
- Archive Teams content to OpenText utilising governance best practices; and
- Retire Teams and dispose of noncrucial content automatically using OpenText Extended ECM.

IBM buys RPA solution

IBM has acquired a Brazilian software provider of robotic process automation (RPA), WDG Automation. Financial terms were not disclosed.

WDG Automation's RPA capabilities will be embedded into IBM's existing AI-infused automation capabilities across business processes and IT operations, business leaders including Chief Operating Officers (COOs) and Chief Information Officers (CIOs) will have broader access to intelligent automation through software robots.

WDG Automation provides RPA, Intelligent Automation (IA), Interactive Voice Response (IVR) and chatbots primarily to customers in Latin America .

The WDG Automation technology is designed for business users to create automations using a desktop recorder without the need of IT. These software robots can run on-demand by the end user or by an automated scheduler.

This will further extend the capabilities of the IBM Cloud Pak offerings on Red Hat OpenShift, starting with Cloud Pak for Automation. As part of the acquisition, IBM will integrate over 600 pre-built RPA functions from WDG Automation into Cloud Pak for Automation to help businesses turn insights from AI into automated actions.

Available on any public or private cloud, or on-premises, the IBM Cloud Pak for Automation offers clients a single set of AI-infused automation software and services, including data capture, workflow orchestration, decision management, monitoring and reporting, that helps companies design, build and run intelligently automated business processes and IT operations.

With WDG Automation, clients will be able to more quickly identify more granular opportunities for automation, accelerate the deployment of bots, and streamline more end-to-end workflows. For example, during invoice processing, WDG Automation click-mining capabilities can help prioritize RPA deployments with WDG Automation pre-built scripts, integrated with the Cloud Pak for Automation, and can be deployed faster and smarter with infused AI.

In addition to business operations, IBM plans to integrate WDG Automation RPA into its capabilities for automating IT operations, specifically Watson AIOps and Cloud Pak for Multicloud Management.

IBM Watson AIOps, for example, automates how CIOs self-detect, diagnose and respond to IT anomalies in real time. RPA can help close the loop and ensure consistent data across all tools that connect to Watson AIOps. This can increase data quality and improve the accuracy of AI.

Mastering a Distributed Workforce

By Kasey Panetta, Gartner Inc.

Whether through new product lines, a fully remote workforce or a whole new online business, COVID-19 will continue to change the way organizations operate. But in the chaos exists an opportunity to transform the future business.

"Executive leaders will have to become more agile to deal with the demands of a highly distributed and potentially inconsistent workforce," says Leigh McMullen, Distinguished VP Analyst, Gartner.

"Three core missions can solve today's problems, and also build a future that is much more resilient and adaptable."

Although many companies tabled digital transformation to deal with COVID-19, the reality is that most organizations have already experienced the worst parts of digital transformation (i.e., layoffs, reduced revenue, drops in share prices) as a result of coronavirus.

They have, in effect, "prepaid" the price of digital transformation, which often requires a lot of upfront change for a delayed ROI.

Additionally, organizations are now managing highly distributed and potentially inconsistent (HDPI) workforces, making an even stronger case to use this time to set a foundation to support digital transformation.

Smart organizations will further their transformation by focusing on three areas.

■ Mission 1: Make work as lean and agile as possible (Everywhere, not just IT or on the manufacturing floor)

With an HDPI workforce, companies do not have the luxury of relying on a central-command structure. Everything must be more agile and more adaptable to a new reality. For example, during COVID-19, employee availability may ebb and flow in relation to their health and that of their family members.

Whereas prior to COVID-19 there was a widespread expectation at most companies that employees would be available 40 hours per week — and generally the same 40 hours — coronavirus has complicated the matter by bringing home and work life together, and adding more stress to every employee.

Employees might be distracted during the day by distance learning for children, managing health for older relatives or trying to find essential items at off-peak times.

Consolidated workload management tools (Kanban boards) will aggregate tasks and enable better resource allocation. When everyone is comfortable with the Kanban boards, it's time to allow for greater ability to select tasks, but consider incentivizing less-desirable tasks.

Further, shift to a focus on domain experts as opposed to the manager when an expert is needed. Set up a mailbox for the "XYZ Role" that can be maintained and managed by whoever has the availability and expertise versus having requests go through a centralized manager.

■ Mission 2: Remove chokepoints and roadblocks

COVID-19 created an HDPI workforce, which will in turn organically do much of the heavy lifting for the lean reengineering of an organization.

Processes will naturally shift toward a focus on the most essential tasks that will deliver a good product. This will happen as a result of COVID-19 impacts, but executives should nudge the process along to be optimal for the business.

First, break down all processes to their smallest components, which will allow a versatilist to take over a piece of the process more easily, rather than having to be trained on the entire workflow.

This also plays into the Kanban board, as smaller tasks are easier to distribute. Documenting workflows will be difficult as people drop in and out of availability, but devise a simple way to track processes.

For example, the first person to walk through a new process is responsible for documenting it. Encourage experts to continuously revisit these processes to find areas that can be optimized.

Finally, never forget to ask the question, "How does this help the customer?" That will help streamline and shift workstreams.

■ Mission 3: Manage time differently

While missions 1 and 2 prioritize autonomy and agility, don't forget to focus on collaboration and coordination. Maintain a daily standup to organize the team, and protect those times.

On the flip side, provide flexible work hours outside of those few meetings. For some people, the choice will be showing up at 9 a.m. or not showing up at all.

Offer the ability to show up when it makes sense. For jobs that require coverage, put in place shifts that make sense for individual employees versus a rigid adherence to a corporate schedule.

While today's disaster is a global pandemic, climate change and increasingly unpredictable weather events will continue to change how the global economy and businesses perform.

Organizations will need to adapt at some time, and given that most have already started this type of transformation to respond to COVID-19, executives can ensure it's setting the organization on a pathway to success.

COVID-19 to drive RPA uptake in APAC

Amidst the growing concerns due to the COVID-19 pandemic, enterprises are compelled to operate with limited staff, provide undisrupted services to their clients and maintain current business operations as in a normal scenario.

Against this backdrop, the adoption of robotic process automation (RPA) amongst enterprises in the Asia-Pacific (APAC) region is estimated to grow further, says data and analytics company GlobalData. RPA vendors are now actively leveraging AI technology to make RPA intelligent. As a result, RPA vendors are marketing and promoting RPA as an Intelligent Process Automation (IPA).

RPA providers are also capitalizing on the current COVID-19 outbreak scenario to focus on expanding their customer base and building customer loyalty.

Some of the methods being adopted include discounted pricing, no cost RPA license, and seamless deployment of bots. For instance,

In recent times, start-ups have also begun offering RPA solutions for niche areas like smart scanning, image recognition, intelligent document processing and pattern recognition.

For instance, Singapore-based Glee Trees leverages AI technologies such as natural language processing and contextual analysis to read structured and unstructured data from multiple Asian languages.

Deloitte and UiPath in Document Deal

Deloitte and UiPath have announced they are working together to deliver Deloitte Intelligent Document Processing (DIDP).

DIDP is an on-premise or cloud-based automation accelerator, delivering a capability which captures documents before extracting, classifying, and verifying their data for processing.

The integrated technology includes OCR, Human-in-the-Loop (HITL), Machine Learning (ML), and the UiPath RPA.

David Wright, partner at Deloitte, said: "Automation is driving digital transformation across a range of industries and organisations, however there are still a number of simple tasks that are not yet easily digitised.

"Using Deloitte Intelligent Document Processing, our clients can reduce document processing time significantly, boosting productivity and allowing teams to focus on more business-critical tasks.

"As a result, complicated risk processes that currently rely on data in unstructured documents and time-consuming analysis can be improved, such as in financial spreading, financial prospecting, tax returns, bank statements, contracts and more."
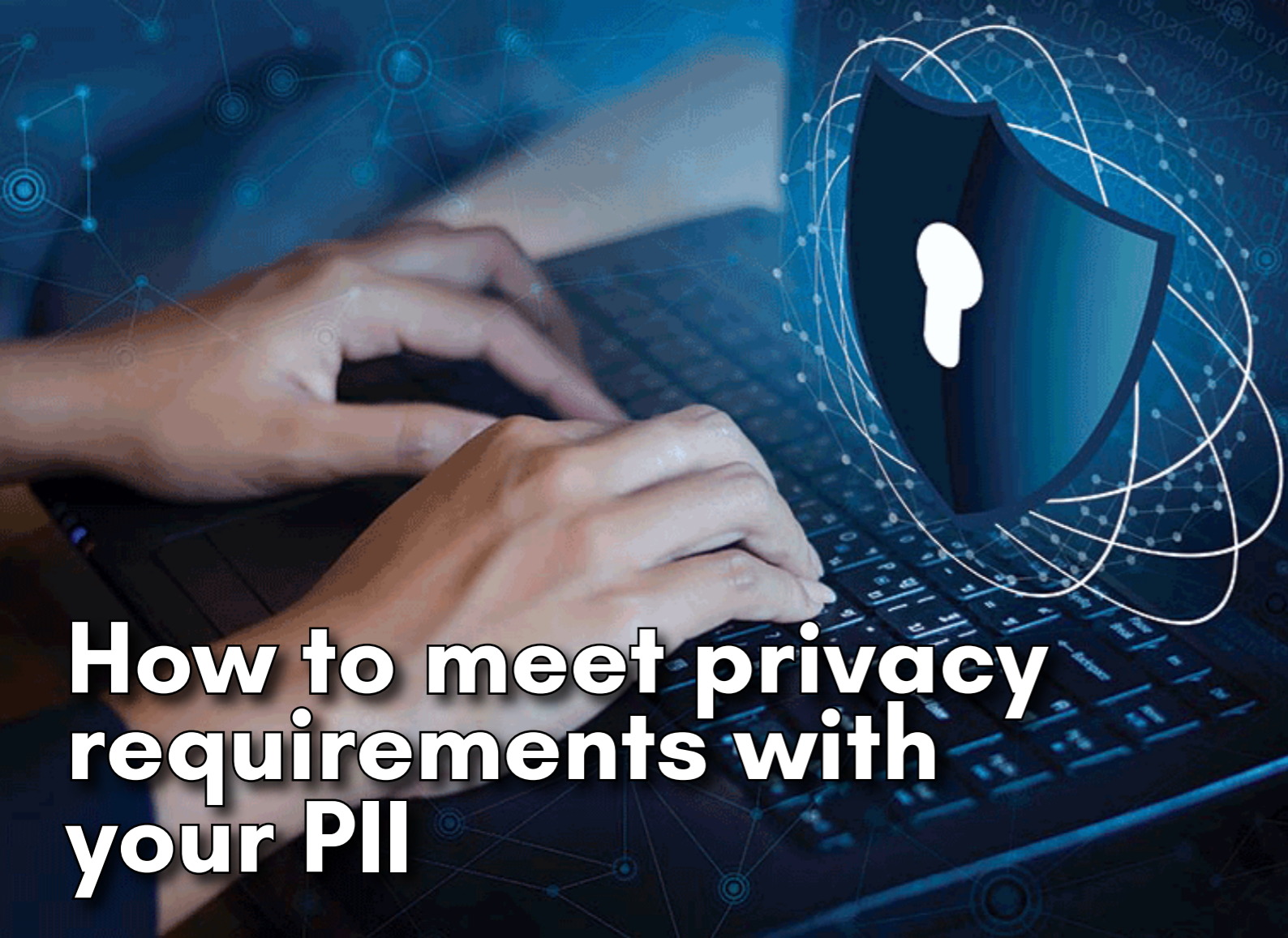
https://www2.deloitte.com/uk/en/pages/consulting/articles/intelligent-document-processing.html

How to meet privacy requirements with your PII

By Dave Humphrey

Organizations are in a race to understand their risk from regulations for the protection and use of personal data, which are on the rise worldwide. With the GDPR in Europe, the CCPA in California, KVKK in Turkey, and several other regulatory actions being enacted around the world, corporations now face serious fiscal consequences and reputational damage that might follow a potential data breach.

At the same time, other requirements, such as the GDPR's data subject access request regulation, freedom of information requests in the US, corporate governance rules, and data loss prevention measures, require corporations to allow for discovery of this sensitive data quickly and securely.

Sources for potentially risky personally identifiable information (PII) can be the obvious unstructured repositories such as file systems and SharePoint, but can also be held inside structured databases as objects.

This all leads to the need for a process in which PII files can be easily identified, indexed, and retrieved.

The ideal end-to-end process should look something like this:

■ Discover repositories and identify files.

■ Extract all the metadata and, more importantly, the content from the file.

■ Analyse file content and metadata for specific entities and/or classify the file based on conceptual content.

■ Apply business rules on results of the analysis to place the file in a defined category.

■ Take action on the file according to the policies defined for that category.

The overall process is complex. Focus on the major parts of the process and file analysis, and concentrate on the ability to locate PII entities within their contents, and you'll be one step closer. Here's how.

Understand grammars for entities

Grammars are used to describe the entities you are trying to identify, with two basic types available: curated and user-generated.

Here are the grammars to focus on:

■ PII - Personally identifiable information, including 13 categories of entities across 38 different countries

■ PHI - Personal health information, normally associated with the North American health industry

■ PCI - Personal credit card information

■ PSI - Personal security information, for account details access keys

Look for curated and optimized grammars that cannot be modified by the user. These grammars use context and landmarks to provide more accurate results.

Context and landmarks are used to give a confidence score that can be used later to filter out false positives. These context and landmarks can be phrases, single words, or even just characters.

Their proximity to the identified entity candidate and the strength of the context based on natural-language processing (NLP) techniques are used to create the score. Comprehensive lists of certain entities that use the knowledge of their commonality (country specific) to adjust the confidence scores are key.

When such grammars do not completely cover your use case, use bespoke configurations that allow users to create their own. User grammars can be defined using format descriptive RegX or simple lists, for example. These definitions can then be compiled into a finite state machine (FSM) prior to execution to improve performance.

Multiple grammars can be combined into a single FSM to save resources, but you cannot combine curated and user grammars due to the optimizations already applied to the curated grammars. Any required modification to the curated grammars needs to be requested to be added to the product to improve the corpus.

Categorization for files

Conceptual classification of the file content as a whole can also be used to classify the document, for example as an HR, Finance, or Travel type. This can be used along with found entities when you apply the business rules to get a more accurate result. With machine learning and guided learning on sample documents, you can help define the classifications to be used.

Scanned documents and audio recordings

Text-based documents are not the only potential source of PII risk. Scanned documents and, to a lesser extent, recorded conversations, are also common today. These files must be pre-processed prior to applying the PII discovery techniques discussed above.

Scanned paper documents stored as images, possibly inside a PDF file, should be processed with OCR to extract the text and, ideally, the associated structural information. Many organizations have scanned ID documents such as driver's licenses or passports held on record for employees.

A combination of face detection and OCR can be used to discover these files. Specifically, face recognition is not used, since this is only required for data subject access requests (DSAR). Audio recordings require processing by a speech-to-text engine to again provide the transcript for analysis.

Speed is king

Speed is important, especially for a data loss prevention (DLP) application, but also just to reduce the resource footprint.

Certain entities are simple and therefore fast to search for (i.e., an eight-digit passport number). More complex entities such as names or addresses are significantly more demanding in resource utilization. In certain circumstances, you can search for simpler grammar as an indicator of a more complex entities presence. This creates potential candidate windows within your document to apply the slower complex search to, for example, postcodes for addresses. This method is ideal for documents with low or even no hits, where it will significantly reduce processing times.

Another way to reduce resource requirements is to use entity aggregation to trigger an early exit of the analysis. This involves looking at the count and type but not the value of an entity. Once you have found sufficient entities, you can flag the document as sensitive and stop further analysis (for example, one name and one address or two credit card numbers).

What are the gotchas?

You must fully understand the business outcome you need to achieve in order to configure PII detection optimally. Evaluate what cost would be of false positives and or false negatives in your results and use this information to make trade-offs between time/resources and accuracy. Regardless of how well you set up a system, you will get false positive results. This is often because certain entities of interest have a very common format without checksum or context to distinguish them.

Another problem is with names of people, since almost any set of letters is a potentially valid name somewhere. The ability to narrow down the region of interest and then set some rules on common and uncommon names will prevent significant time wasted in false positives. This comes at a cost, though, since one day that weird letter combination may well be a name and you will have missed it.

A particular type of bank code with a very simple format can potentially lead to a large volume of false positives. The entity includes a country code that can potentially be restricted to only probable bank locations, allowing a much tighter format check to be applied.

Problems that may arise with entity detection have to do with tables. These may have well-labelled column headers that match the names of defined entities, but the difficulty arises with the proximity of this landmark to the actual entry in the table. You can solve this with careful use of entity name detection, along with entity detection.

Finally, on occasion entities are split across columns or lines in a document. Where a forename/surname combination may provide a strong confidence factor, we now get a weaker match for the separate entities. Again, the clever use of landmarks and context with post filtering can help resolve these issues by resolving the parent entity.

I found it. Now what can I do with it?

You now need to decide what action if any you need to take on the file identified as having PII content at risk. The following common options are available, driven by corporate governance:

■ Delete the data. If there is no need to keep the file, remove it. Is it too old? Has the customer requested that his or her data be destroyed? The important thing here is to maintain an audit trail of both what you did and why you did it.

■ Secure the data. If you need to keep the data, then secure it. This may be in the form of changing access controls or encrypting the data. A further option is to move it to a secure location such as a records management tool.

■ Redact the data. You may need to keep some of the data but not the PII. Redaction can be used to create a clean copy of the original file that has no PII content left to read. The original file is then deleted or secured as described above.

Take action now

PII information is pervasive, it can be found everywhere, and if you don't find it first, a hacker might. Take action now to reduce the risk to your organization with AI-powered unstructured data processing and analysis.

Dave Humphrey is CTO, IDOL, Micro Focus.

8 ways your AP process leaks spend and how AI can prevent it

By Anant Kale

Today's companies put huge efforts into negotiating the best terms with their suppliers. Procurement teams regularly spend weeks or months going back and forth on contract terms and volume discounts to get the most bang for their buck. Too often, these savings aren't realized.

Suppliers may ignore the negotiated terms when invoicing, and AP process teams, faced with a deluge of invoices and limited time to get payments out the door, only sample select transactions and only do basic 2 or 3 way matching of volume and price. This inevitably means costly invoice problems fall through the cracks — from mismatched invoice and contract terms, to unapplied discounts, to completely bogus charges, and more.

Optimizing your AP process may seem like a big undertaking, but it's much easier than it might seem, and worth the effort. According to The International Association of Contracts and Commercial Management (IACCM), companies that work to improve controls over invoice payment will see a return of more than 4 percent of invoice value.

Even if you're ready to improve your AP process, one pesky question remains: How do you actually do it? Once upon a time, it would have been necessary to hire more people to check every transaction. But today, technology can provide a crucial and cost-effective assist for overstretched AP teams.

Artificial intelligence (AI) is becoming more and more common in business contexts. Nearly 90 percent of companies planned to increase AI spend in 2019, according to a Deloitte survey. However, the idea of actually using AI may feel a little unrealistic for some.

While more and more corporations are automating AP processes, 30 percent of businesses still rely on manual invoice processing, according to The Institute of Finance and Management.

If you've already implemented other technologies in your workflow, AI can fit in seamlessly. AI-powered spend automation software integrates with existing expense management, invoice automation, contract management, and ERP systems to augment rather than disrupt your status quo.

8 Common (And Costly) AP Process Problems

Here are just a few of the problems AI-powered solutions can help your team avoid during the spend audit process:

■ Fraudulent invoices: When it comes to invoice fraud, if you can dream it, chances are fraudsters have tried it: From inflated invoices, to completely made-up charges, to shell companies, to vendor impersonation, and more. Too often, the calls are coming from inside the house. The Association of Certified Fraud Examiners (ACFE) found that occupational fraud (fraud committed by employees against employers) resulted in more than $US7 billion in total losses in 2018. AI systems with a compliance component can spot risk factors commonly associated with fraud so your team has a chance to review these invoices manually before they're paid out.

■ Duplicate invoices: Up to two percent of the average company's invoices a duplicates, according to AuditNet. This may seem like a relatively small number, but for businesses doling out millions or billions on business activities, the figure is far from trivial. Some vendors might double up charges on purpose, but often duplicate invoices are mistakes (after all, your vendors' finance teams are overworked too). While some invoice automation systems try to catch these double charges, they usually only succeed if the invoices are labelled with the same number or have the exact same total - which isn't always the case, particularly if there's someone scheming behind the scenes.

■ Missing discounts: You fought hard for volume discounts, but how often are you checking invoices to make sure they're applied? AI-based systems can often compare contract and invoice terms automatically to make sure you're not missing out on early payment, loyalty, or quantity discounts. You'll be notified of any missing discounts so you can remedy the situation before you pay. In the case of early payment discounts, this software notifies you that the invoice should be prioritized to get payment out in ample time.

■ Mismatched service levels: You signed up for the standard package, but you're being charged for the premium offering. This type of mismatch is all too easy to overlook amid your monthly deluge of invoices. The correct AI solution can compare agreed-upon service levels in your contract with every invoice you receive to make sure that this type of costly problem doesn't fly under the radar. When it comes to physical items, it can ensure you receive all the items you're being billed for before you pay, by double-checking shipping documents against inventory systems.

■ Double payments: Double payments can happen as a result of vendors submitting duplicate invoices, but the problem can also originate from your own team. Accounting systems hold up an invoice for all sorts of reasons, e.g., it requires further approval, or it failed a match. In many cases, an employee might intervene to get the invoice paid manually (to meet a deadline or because they're being pestered by a supplier or don't want to damage a relationship). Meanwhile, the invoice is still in your system and when the hold is later cleared up, it's processed and paid... again.
This is another one of those sources of spend leakage that most companies never become aware of. AI-powered systems constantly cross-check invoices and payments and flag any duplicate payments before you send them out, so the money never leaves the front door.

■ Exorbitant pricing: It can be difficult and time-consuming to keep track of the market rate for all the various services and products your business requires. AI can regularly compare your current costs to thousands of other sources to determine whether your invoices reflect the market rate for the goods or services provided. It can also flag individual invoices where your price exceeds the market rate.
Knowledge is power, and this information helps your business negotiate more effectively with existing suppliers or look to new ones if there's an opportunity for cost savings without sacrificing quality.

■ Unsatisfactory work activity: When it comes to hiring contractors, there are situations when it's particularly difficult to understand and assess whether they're fulfilling their agreed-upon duties, like professional and IT services. AI-based tools can ingest nearly unlimited data to build a profile of what comprises satisfactory work activity - e.g., regular activity in Slack or over email - and highlight changes in the typical patterns. This helps you verify that you're paying contractors fairly for the work product they're providing.

■ Overpaying for software: Are you licensed for seven software seats, but only using three? It's not uncommon for organizations to overpay for software licenses without ever realizing it. AI-based software keeps tabs on your organization's software usage and compare it to the charges on your monthly invoices to help alert you to savings opportunities.

How AI Can Help With AP Process Spend Management

Implementing a best-in-class AI solution can support a consistent process and add an additional layer of scrutiny. These solutions make it possible to audit 100% of invoice spend prior to payment, automatically and near-instantaneously checking every invoice in your system for risk factors before they're paid, and flagging the highest risk items for your team to review. This will help your team get ahead of problems and potential leakage, rather than try to recover it afterwards.

Below are the critical requirements for considering an AI solution for AP spend management:

■ Audit 100%, prepayment. Automatically audit 100% of invoices before reimbursement with AI.

■ Understand documents. Instantly scan every line of every invoice to understand charges and track the correct spend category.

■ Enrich with intelligence. Check online sources to identify better prices for similar goods and services.

■ Assess and refine risk. Flag suspicious addresses or billing changes to avoid fraud. Spot duplicate charges from other invoices, other invoice systems, or from expenses.

■ Streamline process. Integrate into your existing AP automation system to audit every invoice in real time to spot errors, waste, and fraud.

AI solution: Conclusion

The best AI software can help your team regain control over your spend by checking every single transaction to identify high-risk invoices in your pipeline — saving time, streamlining processes, and ultimately reducing spend leakage.

If your AP team's efforts to find problematic spend feels never-ending, you're not alone — but it doesn't have to be that way. AI has changed the paradigm for modern finance teams, giving them greater visibility into their AP process and the time they need to address the highest risk issues.

Not only can AI transform the way finance teams operate, it also saves them business money by spotting problems consistently and before invoices are paid. By implementing a leading AI solution, your team can audit 100% of spend, make sure that every invoice complies with its contract terms, and ensure you're receiving every savings opportunity you're entitled to — all while paying your bills on time.

Anant Kale founded AppZen (https://www.appzen.com) in 2012 to bring AI into back offices around the world. As CEO he is responsible for the product vision and execution of the company's broad mission.. He has an MBA and a BS in Finance and Engineering from Mumbai University.
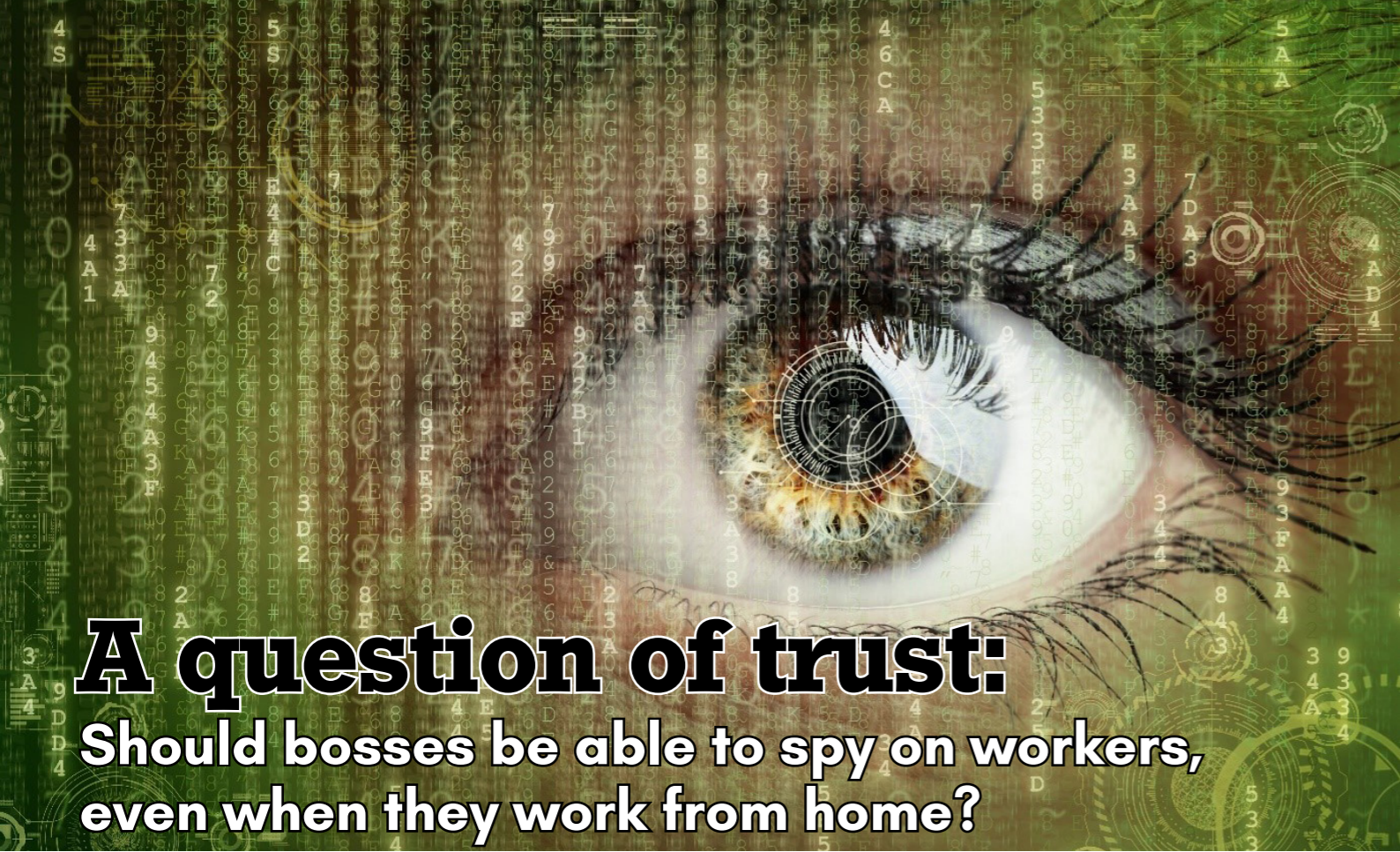
A question of trust:
Should bosses be able to spy on workers, even when they work from home?

By Val Hooper, Gordon Anderson, and Stephen Blumenfeld, Victoria University of Wellington

Anyone familiar with George Orwell's novel 1984 will relate to the menace of Big Brother watching their every keystroke and mouse click. For a growing share of the workforce that dystopian reality arrived while most of us were hunkering down in our "bubbles".

With employees working from home during the COVID-19 pandemic, more companies felt the need to track them remotely. US-based Hubstaff, which develops and markets employee time-tracking software, boasted a three-fold increase in New Zealand sales during the first month of lockdown alone.

Now, with some organisations thinking of continuing work-from-home flexibility beyond the pandemic restrictions, that scrutiny should cut both ways.

Employers have long used swipe cards and video surveillance for safety and security, and monitoring staff email during work hours is nothing new. But the latest generation of employee surveillance software has transformed the modern workplace into a digital panopticon.

While newer tools aimed at tracking employee productivity, such as computer-usage monitors, have increased the management arsenal, most focus on specific activities. What is now proposed are mechanisms that monitor employees 24/7, including apps that can be loaded onto mobile phones

One such product advertises its ability to "catch disgruntled employees and protect business intellectual property". It can "monitor all social media and networking apps by accessing conversations, passwords and media shared through the apps".

More trust means better productivity

The uncomfortable reality is that many employers feel entitled to monitor employee activity. If I'm paying their salaries, they argue, they should be doing my work. Their time is mine.

The problem with effectively intimidating employees into being productive is that it strongly suggests an organisational culture of mistrust – yet research shows that mistrust undermines productivity.

Spyware that is introduced outside the collective bargaining process concerns trade unions, who argue workers' privacy may be unfairly invaded in the name of performance measurement.

In the year to June 2019, only 5% of collective agreements in New Zealand included a specific clause (or referred to a document outside the agreement) dealing with internet or telephone monitoring. That amounts to only 1.1% of employees on such agreements.

The prevalence of agreements that mention work being electronically monitored varies considerably across the labour market. But far more employees are on collective agreements that make no mention of it, despite their work being regularly monitored.

Those who make up the 80% of the New Zealand workforce covered by individual agreements have few choices. The obligation to install and use monitoring software derives from the duty of employees to obey the reasonable orders of their employer, and contractual obligations to comply with employer policies.

The law is getting left behind

The standard against which actions are judged is that of the "reasonable employer" – not a neutral party, let alone a reasonable employee. The result is that employees have very limited protection from intrusions into their privacy and personal life.

Compounding the problem, monitoring software is evolving so rapidly the law has no time to respond. Other than in the most egregious circumstances, the courts are unlikely to hold that using already widely adopted tools constitutes the action of an unreasonable employer.

Under the principles of the Privacy Act 1993, people should be made aware of any information being collected about them and why.

They are entitled to know how it will be used and stored, who will have access to it and whether anyone can be modify it.

The information should not be kept longer than necessary, and it is essential to know how it will eventually be disposed of and by whom.

Above all, such information should not be collected if it intrudes "to an unreasonable extent on the personal affairs of the individual concerned".

Naturally, people should be entitled to access that information. However, as with employment law, privacy law tends to give greater weight to the right to manage than to intrusions into employee privacy.

Privacy is a health and safety issue too

The law reflects an underlying assumption that time spent on a job equates with higher-quality work. But this is not necessarily correct.

In many industries, including IT, the focus is very much on the task. Employees are often dotted all over the world in different time zones. They contribute at times of day that work for them.

Monitoring attendance, productivity and hours worked – in other words, checking up on employees to ensure they're not "skiving off" – leaves them feeling mistrusted and that their privacy has been invaded. Stress and sick days increase, morale drops and staff turnover rises.

As yet, the health and safety implications of intense monitoring have received little attention in the courts from workplace health and safety regulator Worksafe.

Allowing staff to work at home requires trust and the openness to have honest, frank and supportive discussions if substandard performance is noticed. Employers seriously considering monitoring employees working at home should be very clear about their reasons before jumping on the post-COVID work-from-home bandwagon.

The devices that allow the monitoring of home workers should be used carefully and not exploited. Otherwise, the trust inherent in good workplace culture will quickly erode, along with the productivity that goes with it.

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11 Key Steps to a Successful Digital Transformation

By Blake Gilmore

The time to embrace Digital Transformation is now. But for those who are still in planning stages, you may be feeling a little behind the curve, which can be a daunting place to start. It doesn't have to be. 65% of companies are positive about their ability to adapt to technological disruption over the next three years. So why not start now?

A comprehensive Digital Transformation initiative will be your go-to strategy to address change quickly across your entire organization. The most successful organizations drive change from the executive level, focusing on employee contributions and outcomes to effectively provide exceptional customer experience improvements.

We aren't talking specifically about customer service, but truly understanding the customer need you are solving – and making sure you are solving it better.

When approached holistically, Digital Transformation can be achieved by focusing on three areas: Digitizing Your Operating Platform, Establishing a Culture of Change, and Empowering Employees.

To make these goals a little more digestible, let's quickly review point by point, so you can get started and reap the many benefits of a more streamlined approach to work.

Digitize Your Operating Platform

1. Identify Current Tools and Software

As you lay the groundwork to adapt to new processes, it's important to have an inventory of the resources and software systems you already have in place. Work with department heads or create a small team to ascertain which tools and digital processes you already have in place. Knowledge is power, after all.

2. Define Technology and Resource Gaps

Once your digital inventory is complete, you'll have a high-level viewpoint to assess what's working, where processes improvements can be made, and which areas of your business are untouched and are ideal for implementing more modernized, streamlined digital processes.

3. Assess Digitization Efforts, Past and Present

To know where you're headed, you should know where you've been. This counts for tech, too! Have digital initiatives been undertaken in the past, and what were the outcomes of the projects? Are there departments or certain projects that currently have digital processes in place, and how have those efforts affected productivity, efficiency, and beyond?

4. Pinpoint New Processes to Upgrade

Locate current processes that are the most labour or time-intensive and that have high customer visibility and impact. For best results, conduct an industry analysis or learn more about where your competition has put digital processes into place. Little wins contribute greatly to your overall plan and acceptance.

5. Set Realistic, Measurable Goals

Don't overdo it. Think, plan, research, and set out to accomplish goals in a timely manner. But make sure you're not overshooting the capabilities of your team – or your budget. Failure at the outset can discourage progress in the long run. But step-by-step improvements with a measurable ROI will hold fast.

Establish a Culture of Change

6. Get Buy-In From the Top

Inspire excitement and eliminate employee resistance by ensuring that leadership is involved, enthusiastic, and vocal in supporting new digital initiatives as they come up. Even better? Encourage team leaders to host weekly or bi-weekly check-in sessions (virtually or live), so that updates, next steps, and results can be shared.

7. Start Small

It's okay to start small. It's the best way to enact sustainable change. Creating a huge shift overnight can create resistance and panic, and it leaves room for unforeseen errors that can make a large negative impact. Make changes incrementally by implementing them in waves to assess progress as you grow.

8. Celebrate Changes

Refreshing company culture starts by taking a leap of faith – even when the change is backed up by research. Get stakeholders on board by creating a culture that not only celebrates innovation but values new ideas and feedback. Which leads to the next point...

Empower Employees

9. Keep It Simple

To encourage adoption, you need to be sure that your staff is able to get on board quickly and without complication. Eliminate complexity when possible, and adopt processes that dovetail with the work you do without shaking it up too much – at least initially. Lunch and learn sessions, full training guides – provide whatever resources you need to in order to ensure staff success.

10. Encourage Team Collaboration

We're all in this together, right? That means that facilitating communication on ways to improve the process needs to come from everyone. Create a forum for feedback and take critiques and new ideas into consideration to keep the transformation going.

11. Focus on Outcomes

Remember the goals you set back in step five? Review, revise, and repeat. Check in regularly with stakeholders to understand if those goals are being met and where bottlenecks are happening, and create an action plan to address challenges so progress doesn't stall.

2020 has presented us all with unprecedented business challenges. Yet for organizations that already have digital data management and communications solutions in place, not only has business kept moving during a time of disruption; indeed, many organizations have thrived in this new environment.

Their work has continued, their customers have benefitted from uninterrupted services, and their employees have been able to easily transition to a remote working reality using the resources and systems they already had in place. No scrambling, no quick learning curve for a new system, no downtime or customer turnover due to lacking products or services.

Whatever the future holds, this time gives organizations an excellent opportunity to grow. Implementing smart, comprehensive Digital Transformation practices will provide you with a distinct advantage over competitors that are slow to adapt. We want to help you and organizations like you – across all industries – conquer new challenges by aligning processes to meet the technological needs demanded by the future workforce.

Ready to get started? Contact us for a quick introductory conversation or to see a demo of our Document Workflow Cloud product solutions.

Blake Gilmore is Director of Product Management at Upland Document Workflow Cloud. He is an experienced digital native who has helped over 100 organizations to achieve their Digital Transformation goals through process consulting and software.

Records Management For IT Pros: A Translation Guide

By Bruce Berends

In June 2018 I joined AvePoint, a company that had been on my radar for quite some time because of its innovative work around Migration, Governance, and Backup. In my capacity as a Senior Systems Engineer, it was important for me to get across all AvePoint's technologies in order to provide the best solutions to customers. So I spent a couple of weeks doing just that ... and then I came across Records Management.

It was one of those dark arts that had been bandied about at past workplaces and spoken about in hushed whispers. I didn't know much until that point, but I knew it was something to be feared. Deploying a Records Management solution was not just a technology engagement; it actually required some learning and consulting with information and records specialists.

Wielding terminology axes like "BCS," "Retention," "Disposal Class," and "Classification," these specialists were relentless in their pursuit of Records Management perfection.

Now at AvePoint, it was my time to face the music. So I donned my armour, grabbed the only weapon I had–my laptop–and entered the jungle that is Records Management with great trepidation. Here are just a few of the things I learned

1. Learn to speak the language.

After working in IT for such a long time, I thought I had a pretty good grasp on what the definition of files and folders were...but not so much in the Records landscape. In IT, a "file" is loosely defined as a collection of data stored as a unit with a single name (or filename) like a Word document. A "file" in records management terms is a container (e.g. a folder). As you can imagine, it's very easy for an IT person and Records Manager to use the term "File" when collaborating and completely misinterpret each other.

There's plenty of terminology that crosses over between the two fields of IT and Records Management, but it's essential to learn the nuances that exist. In my experience, the problem is that there doesn't appear to be a "Records Management Dictionary" that every Records Manager abides by. They usually work off terminology that is based on the legacy systems or organisational processes they've been working with for many years. To resolve this in my engagements, I find it's best to explain what I mean when I use particular terms at the start, so everyone has a clear understanding of what the other is talking about.

2. Be gentle; new technology is hard for some to grasp.

From my experience, Records Managers are by and large very inquisitive and interested in differing views and opinions about Records Management as a whole. When it comes to their Records Management solution, however, they can be a little apprehensive. During my time spent helping organisations realise the benefits of Office 365, I've been regularly challenged by Records Managers who are trying to replicate their processes from legacy systems into a collaboration platform that just doesn't work in those same ways.

Quite simply, your legacy (or soon to be legacy) Records Management solution is most likely very well designed for its time, but it just doesn't cater to today's modern workplace. With the recent COVID-19 pandemic, more people require the ability to work from anywhere on almost any device–including Records and Information Managers.

Software-as-a-Service solutions (like Microsoft 365) are the ones that have been the easiest to manage and maintain during these times, as the experience in the home is consistent with the experience in the workplace for both users and administrators.

"But what about all that work I did setting the system up over the last couple of years?" is also a common thing I hear. Well, there's good and bad news.

The good news is that Records Management as a practice hasn't really changed; there's still the foundation and all the groundwork that you've put into understanding your organisation and how it works from a Records Management standpoint.

The bad news is that you're probably going to have to go through a little bit of pain first. You need to figure out how to use that good work you've already done and apply it to the modern workplace and all the challenges that come with it. Luckily, most of you will already have someone that can help you with that: your friendly IT personnel.

Records managers who are looking at Office 365 solutions are usually doing so because there's been a directive in the organisation to utilise Office 365. I can assure you, your IT personnel are dreading the change as much as you.

Though IT personnel are usually seen as "the enemy" or "the people who are taking away my system," the best Records Management implementations have been those where the IT personnel and Records Managers work together to achieve a common goal.

Thus, it's important to work with your IT personnel to ensure they understand where your concerns lie so they can find ways to alleviate them. Remember that this isn't just a new system; it's a whole new working platform, and the more knowledge you have about how it functions, the better equipped you will be to design your Records Management program around it.

3. Machine Learning and Artificial Intelligence AI are the best thing since filing cabinets...or something to be avoided at all costs.

To use advanced technology or to not use advanced technology; that is the question. As it relates to Records Management, machine learning can help identify documents based on patterns and keywords and automatically classify them appropriately.

Personally, I'm quite excited by how this technology can be applied in various circumstances (and it's already active in things like tagging Facebook photos). That said, keep in mind that this won't be a "silver bullet" that will classify everything correctly.

What is not widely understood is the amount of setup work required to get the right results out of these technologies. All models need to be set up, trained, and regularly checked for false positive items to ensure that the solution is meeting your requirements.

The technology will be much more reliable as your sample sizes of records grow over time, but there will be a lot of work in the early stages to ensure you're getting the results you desire.

In summary, as a Records Manager, you need to assess what you can and cannot utilise these technologies for, and work with your IT personnel to address how you will deal with records that may not necessarily suit your needs.

4. In-place Records Management is the preferred approach for end users.

Some of the Records Managers I speak to love the concept of users registering or classifying a record in a solution because that's the way it's been done across a variety of legacy solutions.

However, for as much as I respect the method, it doesn't always make the most sense to people who need to use it. As an end user-facing structural system (particularly in collaboration platforms), this "functional filing" can be a bit confusing to the average user.

Thankfully, there are ways of having your cake and eating it too. With AvePoint's Records Management solution, your end users can create items wherever they please on the in Office 365 and AvePoint Cloud Records will manage it from the point of creation by applying a classification from your BCS to it. End users will love it because they can work in a way that makes sense to them, and Records Managers will love it because records get managed immediately upon creation! You can even do Records Management by stealth and hide the classification field from your end users so they never know it's being managed.

5. We're different, but still the same in a lot of ways.

Although I've likened Records Managers to wonderful and mysterious creatures in the past, I find that most aren't unlike us techies.

You have your groups that tend to be a little stubborn and stuck in their ways. Other groups who are trying to find a balance between the traditional teachings and newer ideas being brought to them by the new guard on the scene. And finally, those in the new guard who are trying their best to bring a new perspective to older ways to help everyone work in a modern workplace.

What is consistent is that every records manager I've meet cares about making life easier for everyone within their organisation, something I know we all have in common.

I think sometimes we forget that it was only 13 years ago that the first iPhone was released. With the average age of the global workforce being around 39 years old, most workers would have been 26 at the date of release. If we look at how quickly technology has progressed since then, it's amazing to think what the next advancements could be.

The acceleration in technology is at a rate unlike ever before, and therefore there is a pressure on all organisations and personnel (especially techies and Records Managers) to keep up. Even in my short time at AvePoint, I've already seen remarkable innovation in our product set. As techies, however, we cannot continue to innovate and improve if we aren't guided by experts in their field, and that's why it's imperative that in order to get out of the jungle unscathed, techies and Records Managers need to work together in order to help each other progress in the modern workplace.

Bruce Berends is a Senior Solutions Engineer at AvePoint Australia. This article was originally published at https:// www.avepoint.com/blog/manage/understanding-records-management/

ABBYY injects Intelligent Document Processing into SAP Intelligent RPA

Enterprises today are moving fast in their digital transformation journey, but all have the significant challenge of unlocking key information inside their business documents such as invoices, orders, and other unstructured content. Much of the content from these varied business documents end up in systems like SAP and countless other enterprise systems.

A central part to every digital transformation initiative includes robotic process automation (RPA) to automate virtually any structured task that is repeated by humans. This can include interacting with systems like SAP to input data and validate information.

SAP Intelligent Robotic Process Automation assists in automating these types of manual tasks in finance, sales & delivery, manufacturing, sourcing & procurement, and professional services to improve company operational efficiency, increase compliance, and lower risk by automating repetitive tasks for employees.

What enterprises have learned over the course of the past couple years is RPA needs assistance in automating processes involving documents, emails and other unstructured data.

Think of it as adding intelligence to an SAP robot, where the robot is equipped with the necessary digital skills that apply vision, understanding, and insight to the robotic process so that a robot can process a document like an invoice, purchase order, or bill of lading.

The cognitive skill is trained software that can be invoked by the SAP robot, where the skill would identify the document as an invoice, locate and extract the header, footer, and line item details, structure and validate the data, before handing the data back to the robot for processing in SAP.

A common misconception is it's just OCR, which completely misses the mark on what is really happening. Another preconceived notion is that templates are required for each variation of a document like the different vendor invoices.

That is false and that would be an exercise of futility which would fail miserably.

A better way to think of what is happening when a document is processed is to consider the intelligence of automating in the words of vision, understanding, and insight.

■ Vision – Ability to digitize text in a document, apply image analysis to optimize readability of an image, and analyze the structural makeup of a document by segmenting words, phrases, sentences, and paragraphs.

■ Understanding – Applying machine learning to train a project to classify a document type and extract data. The software learns from the initial training set of documents, and learning improves overtime as the training set expands and statistics are collected at runtime during human-in-the-loop verification. In the case of invoices, ABBYY delivers a pre-trained model that enterprises start with.

■ Insight – Applying structure and meaning around the text to mimic human judgment like establishing the relationship between data (e.g. buyer vs. seller).

When you combine ABBYY's offering with SAP Intelligent RPA, ABBYY's Content Intelligence technology and solutions provide the cognitive skills required to assist in automating content-centric processes.

Content Intelligence is truly changing the way enterprises work by powering the new digital workforce with the skills and understanding needed to make intelligent business decisions.

You can also learn more by visiting the SAP Community to see the latest technical blog post – How to Combine SAP Intelligent RPA with ABBYY FlexiCapture. If you already have a license of SAP Intelligent RPA and ABBYY FlexiCapture, you can download the connector from the SAP Intelligent RPA Store. For more information Phone: (02) 9004 7401 or E-mail sales@abbyy.com.au
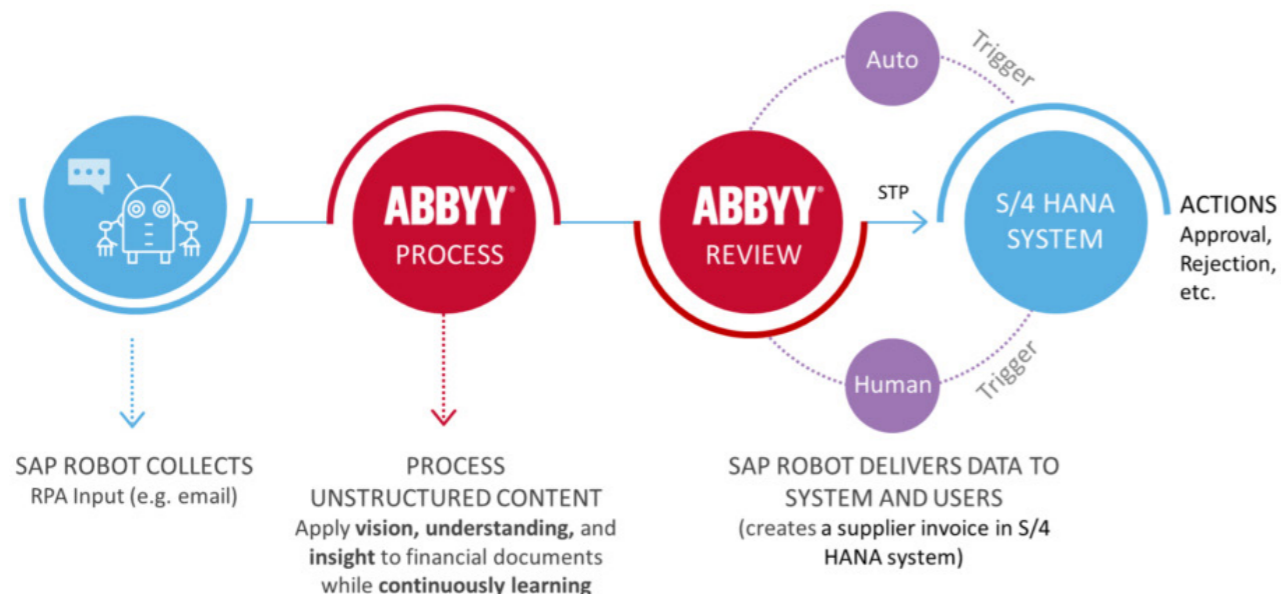
The general process flow between SAP Intelligent RPA and ABBYY.

Cessnock City Council locks in to NSW e-planning portal

Cessnock is the first and only Council to have near realtime integration with the NSW Planning Portal via an API and according to Cessnock Council's Business Support and Customer Relations Manager, Roslyn Ashton, "it will provide significant productivity savings for Council along with further improvements in application processing times".

Cessnock City Council initially formed an e-Planning project team setting the foundations for the implementation of the NSW Planning Portal. After 12 months of the using the Portal, full systems integration went into live production on July 1

The commitment to improving the customers experience was the key focus for Council, and the NSW Planning Portal was to provide a tool that allowed the community, stakeholders and government agencies to work together.

In order to improve efficiencies in relation to Council's operational needs, Australian software developer CIBIS was engaged in October 2019 as a consultant to develop a middleware solution that supports the integration between the NSW Planning Portal and Council's operating systems via application programming interfaces (API's).

Tony Heitmeyer, CIBIS General Manager said "It's one thing working through planning rules, regulations, determinations and compliance issues, but it's another to ensure that the various IT systems work together including that from NSW Department of Planning, Industry and Environment (DPIE), Local Government systems and other private enterprise vendors."

CIBIS successfully worked with Council's corporate vendor, Civica, and the DPIE to develop the solution.

The integration includes the management of documents, lodgement and determination of applications and will also extend to other portal functionality, such as certificates, when further API's are made available.

CIBIS has provided a configurable middle ware component to integrate the NSW Department of Planning, Industry and Environment Planning portal with local government back end information systems.

The systems involved are:

1. DPIE Planning Portal APIs

These APIs push development application data to the middleware platform and allow the middleware platform to update the application as it progresses through the approval process within the council systems. Interaction is via secured REST based APIs with inbound and outbound que systems.

It's all done in near realtime, with back up and re-try logic to support intermittent failure of either end, and recoverable error handling.

2. Council Back End Systems

DA Management System. Civica's Authority Enterprise Solution (one of the major local government platforms). Civica have provided a REST API layer into their system that allows the middleware to interact with the relevant system modules.

3. Enterprise Content Management Systems

Three Options are currently provided. An option to push DPIE attachments into Microfocus Content Manager (Trim), TechOne ECM or via the Civica authority API for other Civica supported content management scenarios.

The broad outline of the integration is:

■The Applicant submits the application via the NSW DPIE portal. The benefit to the applicant is that the DPIE portal provides a consistent state-wide application process standardising across multiple councils (and even adjoining boundaries).

■The submitted application is then sent to the middleware which then loads the application into Authority. This process involves identifying and potentially creating CRM records for the applicant, identifying the property, mapping the application data into an Authority application and uploading the attached documents into the configured content management system.

■Throughout the approval process, further information submissions are processed updating the documentation in the council systems.

■Once the application has been determined by the council, the middleware initiates the process to upload the determination documentation back into the DPIE portal and close the DPIE portal case with the outcome.

CIBIS middleware supports a modular adaptor approach including online Forms (e.g. www.formlify.com) and will be expanded to support new digital transformation initiatives around IOT system as well.

CIBIS is now in the process of rolling out the middleware solutions to other Councils using Civica's Authority Enterprise Application.

https://www.cibis.com.au/

Machine Learning: giving us all a bad name?

By Rachael Greaves

Machine Learning is a really common AI technology. People tend to assume that ML means machines teaching themselves – but really, ML means machines learning from people.

Once the machine has learned, or been taught, it can start to make its own predictions. But the process of learning can be very onerous, depending on the approach.

There are two main approaches to ML. One is supervised ML. In this approach, a large set of training data is used. The data is curated and labelled, then shown to the machine. The machine learns to recognise data that should also match the examples it has been given.

This is a robust type of ML, but has a significant disadvantage: it requires a lot of training data, and a lot of effort to curate that data. Supervised ML approaches to records and information management have been proof-of-concepted by various vendors, and the feedback has been:

■ The AI needed a lot of training by our records team

■ We couldn't come up with 1,000 good examples of a document for every rule

■ We had to spend time correcting or confirming the machine on every single match

■ Training each rule was so onerous that we had to limit the rules we applied

■ When rules change, we will have to train all over again

■ We couldn't feasibly apply more than one 'rule' to a document

■ It was too much work to set up, and it created more work than it alleviated

But it doesn't have to be this way! Supervised ML is really not scalable for a problem as complex as records management (which needs to apply retention, security, privacy and handling rules from multiple different instruments, and update them dynamically over the life of the record), or over data sets as large as corporate file shares, for example. There's too much data, and each item is rarely just about one thing, so you really can't simplify the rules to the point where supervised ML is comfortable.

Remember that even AFDA v2, ostensibly a 'rolled' up' Records Authority with only 86 classes, actually has 256 separate rule types within those classes. So that's at least 256,000 documents you would need to find, cleanse, and curate for a supervised ML approach, then 'approve or deny' the attempted matches.

And that is assuming one document only matches one class. But a document is never just 'yellow, red or blue'. It's a bit yellow, a bit blue, and mostly red. A contract is not just a 'financial' record. It can also be a record of core business, or relate to compensation, or even be subject to a 'freeze' like PFAS or Natural Disasters such as have arisen in recent Royal Commissions.

Multiple rules will always need to be applied, and those rules come from multiple types of instruments. That's why Microsoft's labelling approach also can't work for records management.

Unsupervised ML, on the other hand, doesn't need the records team to create and curate sample sets, and train the machine. The machine looks at the data itself, and finds its own patterns, clusters and dimensions. It doesn't need humans to create training labels, and it doesn't need humans to 'mark' every match it makes in order to learn and improve.

It is a much faster, simpler and easier ML model from the client's perspective – whereas supervised ML puts the work back on the organisation to teach the machine, unsupervised ML keeps the burden on the vendor (where it really belongs) to develop sophisticated technology.

So don't throw the baby out with the bathwater! AI done wrong can have really negative consequences, that outweigh any potential benefits. You can (and should) have great quality, sophisticated ML as part of your AI and automation strategy. But it doesn't have to hurt.

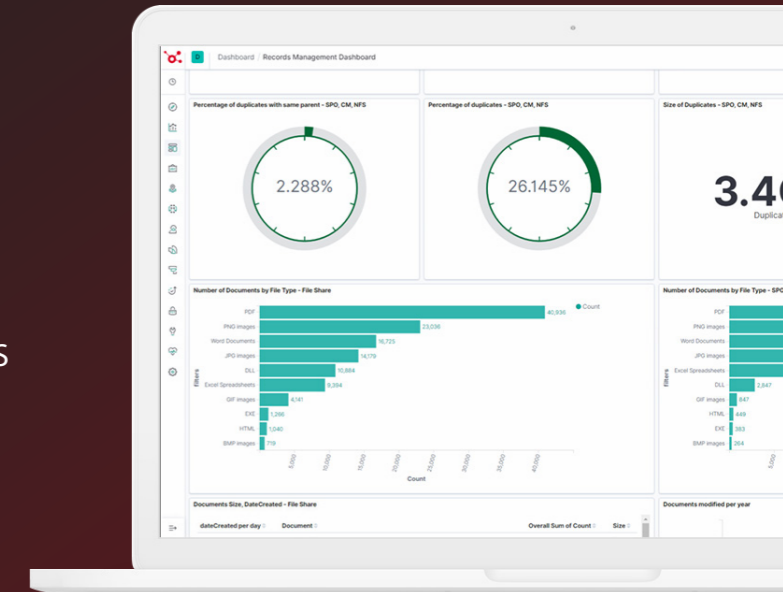*Rachael Greaves is the cofounder and Chief Executive Officer of Castlepoint Systems.*
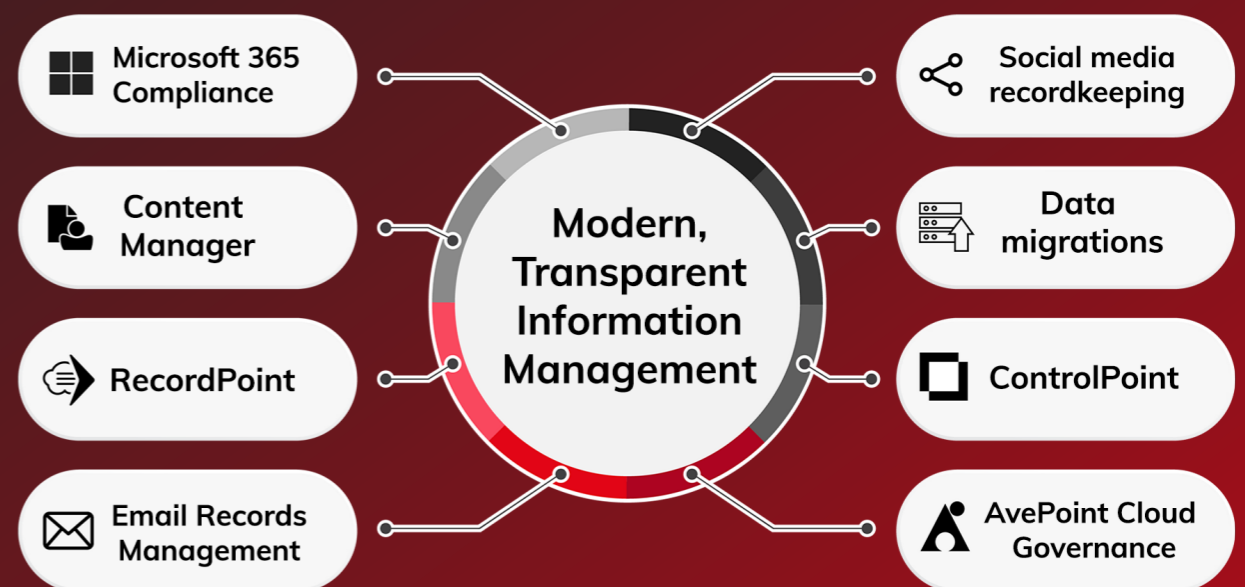
How to ensure your unstructured data is AI-ready

By Russ Kennedy

While unstructured data accounts for 75% of enterprise data, it often goes unanalysed. Here's how to get it ready for AI.

Today's largest organisations are increasingly depending on insights from advanced analytics and artificial intelligence (AI) to make all manner of business decisions, large and small, but there's still a lot of valuable data that has largely remained untapped: unstructured data.

Depending on which analyst report you read, unstructured data accounts for anywhere from 70 to 80 per cent of all enterprise data, and it's growing, but this data has proved difficult to analyse. Organisations that can overcome the obstacles to analysing this data stand to gain a significant competitive advantage over those who don't.

The biggest hurdle to analysing unstructured data is the challenge of scale. It's easy to plug into a file system that's just a few terabytes in size, but large enterprises may have hundreds of millions of files that collectively represent multiple petabytes (PB) of storage. Even worse, those files are typically stored in multiple silos that are often physically separated by vast distances.

As a result, any large organisation that attempts to analyse a substantial amount of its unstructured data on-premises will find the process extremely cumbersome and expensive. Certainly, IT can deploy analytics and AI on-prem using clusters and frameworks such as Hadoop, but that doesn't address the problem of accessing data stored in disparate silos. Large distances introduce unavoidable latency, so the process will be slow, and replicating that much data is both expensive and complex.

If data is stored in the cloud, however, providing access to it is much easier, especially since the major cloud providers now offer some very sophisticated AI, machine learning (ML) and advanced analytics services, such as Amazon EMR, Amazon Textract, Google BigQuery ML and Azure AI.

Whether you want to analyse video, text or image files, there's a cloud service you can employ, and, in many cases, you don't need to be a data scientist to use them, as they provide simple point-and-click interfaces.

Plus, the cloud uses an object store, which is a great format for big data, because it's highly scalable, non-hierarchical and easily accessible. With an object store, you can go right to the data you need without having to navigate a structure or a tree, and, even better for analytics and AI, object stores have a great deal of metadata associated with the data, providing even more information to produce better insights.

The trick, of course, is getting all that unstructured data into the cloud in the first place. Moving or copying multiple petabytes of data is no easy task. Even with a 1 GB/second connection, transmitting 10 PB of data could take up to four months of continuous transfer to complete.

If time is not of the essence, tools exist to move the data. However, whichever tool you use, it must understand the original format (which is likely a file system) to read the data and then be able to write it in the cloud's object store format.

Amazon has a service called Amazon Snowmobile that will physically pull a semi-truck up to your site, copy up to 100 PB of data into a ruggedized storage container, and manually transport it directly to the AWS cloud data centre. The process takes just a few weeks, but is still much faster than transferring such a high volume of data over the wire.

Of course, if you're copying all that data to the cloud, now IT has to manage not only the file data that it has stored in various silos around the globe, but also duplicates stored in the cloud. So if you had 20 PB of data on-premises, now you've got 40 PB to manage, encrypt, back up and secure.

There is an alternative to copying on-premises unstructured data to the cloud: store it all in the cloud in the first place. But simply storing file data in AWS S3 or Azure Blob Storage won't necessarily work for all applications and use cases.

Putting aside the fact that these cloud storage services are object stores, which are not natively suitable for storing files (and that's a huge issue), hyperscale providers build their data centres in sparsely populated areas where real estate is inexpensive.

They're typically hundreds or even thousands of miles from customers, who are typically located in or near urban areas. Not even the speed of light can overcome the significant latency these distances introduce, which makes accessing files in the cloud painful and slow.

So while you may be able to analyse your unstructured data easily in the cloud, it may be all but inaccessible to your applications and users.

Thankfully, there are now multiple file data services that store the master copy of all file data in the cloud, but cache the most frequently used files locally to deliver an expected level of performance.

In these services, changes to files are uploaded to the cloud, which are then synchronised back to the caches in every other location. All data is encrypted using a key controlled only by the customer, so the service provider cannot access the data.

And because these services copy the data in so many different places within the cloud, backup takes place automatically.

As a result, organisations can get all of their unstructured data into the cloud, where it can be easily fed into cloud-based AI, ML and analytics services, yet they still get local performance for file data with just a single copy of their data to manage.

The days of on-premises analysis of big data — especially big unstructured data — are rapidly coming to a close. Only the cloud possesses the scale and ubiquitous access required. The challenge is getting such a large amount of data into the cloud and then mitigating the cost and complexity of managing it. With the rise of hybrid cloud file services, enterprise IT can not only simplify file data management, but also ensure this valuable data is ready for AI and other analytics.

Russ Kennedy is chief product officer at Nasuni.

AWS begins global rollout of Kendra Search Service

Amazon Web Services (AWS) has announced the general availability of Amazon Kendra, its new enterprise search service that uses machine learning to enable organizations to index all of their internal data sources, make that data searchable, and allow users to get precise answers to natural language queries. It is available initially in US East (N. Virginia), US West (Oregon), and EU West (Ireland), with other regions coming soon.

When users ask a question, Amazon Kendra uses machine learning algorithms to understand the context and return the most relevant results, whether that be a precise answer or an entire document. For example, businesses can use Amazon Kendra to search internal documents spread across portals and wikis, research organizations can create a searchable archive of experiments and notes, and contact centre can use Kendra to find the right answer to customer questions across the complete library of support documentation. Amazon Kendra requires no machine learning expertise and can be set up completely within the AWS Management Console.

Despite many attempts over many years, searching for information within an organization remains a vexing problem for today's enterprises. Many businesses and organizations struggle implementing internal search across their siloed troves of data, requiring their end-users to use keywords to find information.

Organizations have vast amounts of unstructured text data, much of it incredibly useful if it can be discovered, stored in many formats, and spread across different data sources (e.g. SharePoint, Intranet, Amazon Simple Storage Service, and on-premises file storage systems).

Even with common web-based search tools widely available, organizations still find internal search difficult because none of the available tools do a good job indexing across existing data silos, don't provide natural language queries, and can't deliver accurate results.

When end-users have questions, they are required to use keywords that may appear in multiple documents in different contexts, and these searches typically generate long lists of random links that end-users have to sift through to find the information they seek – if they find it at all.

Amazon Kendra is claimed to reinvent enterprise search by allowing end-users to search across multiple silos of data using real questions (not just keywords) and leverages machine learning models under the hood to understand the content of documents and the relationships between them to deliver the precise answers they seek (instead of a random list of links).

Because natural language understanding is at the core of Amazon Kendra's search engine, employees can run their searches using natural language (keywords still work, but most users prefer natural language searches). As an example, an employee can ask a specific question like "when does the IT help desk open?" and Amazon Kendra will give them a specific answer like "9:30 AM," and highlight the passage in the source document where it found the answer, along with links back to the IT ticketing portal and other relevant sites.

Amazon Kendra is also optimized to understand complex language from multiple domains, including IT (e.g. "How do I set up my VPN?"), healthcare and life sciences (e.g. "What is the genetic marker for ALS?"), and insurance (e.g. "How long does it take for policy changes to go into effect?"). Currently, Amazon Kendra supports industry-specific language from IT, healthcare, and insurance, plus energy, industrial, financial services, legal, media and entertainment, travel and hospitality, human resources, news, telecommunications, mining, food and beverage, and automotive, with additional industry support coming in the second half of this year.

"Our customers often tell us that search in their organizations is difficult to implement, slows down productivity, and frequently doesn't work because their data is scattered across many silos in many formats. Using keywords is also counterintuitive, and the results returned often require scanning through many irrelevant links and documents to find useful information," said Swami Sivasubramanian, Vice President, Amazon Machine Learning, Amazon Web Services, Inc.

"We're excited to make Amazon Kendra available to our customers and enable them to empower their employees with highly accurate, machine learning-powered enterprise search, which makes it easier for them to find the answers they seek across the full wealth of an organization's data."

Amazon Kendra encrypts data in transit and at rest and easily integrates with commonly used data repository types such as file systems, applications, Intranet, and relational databases, so developers can index their company's content with just a few clicks, and provide end-users with highly accurate search without writing a single line of code. Amazon Kendra provides a wide range of native cloud and on-premises connectors to popular data sources such as SharePoint, OneDrive, Salesforce, ServiceNow, Amazon Simple Storage Service, and relational databases, with more being added throughout this year.

David Frazee, Technical Director, 3M Corporate Research Systems Lab, said "Finding the right information is often exhausting, time consuming, and sometimes incomplete. With Amazon Kendra, our scientists find the information they need quickly and accurately using natural language queries.

https://aws.amazon.com/kendra/

Cognitive computing and AI begin to grow together

By Sue Feldman

When we first attempted to define cognitive computing, we found clear differences between it and AI. We posited that for software to be considered a new type of computing - "cognitive," it must solve problems that were insoluble today. This new class of problem has no precise answers. Instead, it is open to interpretation - it is ambiguous or has no one right answer that is amenable to computation.

For an application to be considered "cognitive," 5 years ago, we proposed that it be adaptive, interactive, iterative, stateful, and, above all, contextual.

In the 5 years since cognitive computing appeared, however, our understanding of the missing pieces that this new kind of computing might provide has evolved. We have found that different depths of analysis are required for different purposes. This means that potential users and buyers must define what their purpose is in investing in a new technology.

While understanding the full meaning of text might be attractive, it is possible to understand enough of a subset so that meaning can be inferred. For example, emotion analysis might require more in-depth understanding of the differences between "like" and "love" than simply labeling both words as "positive."

This gradual adjustment in requirements makes it easier for developers to address only the needs of their target market. More nuanced, more in-depth products can be developed at a slower pace while their features are explored.

Developing suitable expectations

How do we manage the hype and promise for new inventions while making sure that they represent a realistic opportunity?

Can we invent self-driving cars or a Boeing 737 MAX without exposure to the risks these innovations can pose to our lives?

New technologies rarely spring full-blown to the marketplace. Instead, they evolve incrementally, building on a myriad of designs, experiences, and market demands that have come before.

When our inventions were software only, or were minor devices that had small impact, we could afford to allow designers to experiment and correct their mistakes. But we are reaching the brink of disaster when lives are imperilled.

Whom do we trust to make decisions that release new inventions to unsuspecting customers? Who should be trusted?

The truth is, we don't know yet, and technology alone can't give us sufficient answers. All we know is that trust and reliability are imperative, even if we don't know yet what impacts to expect.

That is certainly the case today with cognitive computing.

Cognitive applications and platforms have seen a marked evolution that has given us a mixture of features that solve problems rather than insist solely on purity of design.

They are purpose-built experiments, mixing cognitive, AI, machine learning, and new kinds of interfaces in order to address a specific purpose or need.

Developers and innovators face a dilemma: Predicting the next big thing is nearly impossible. What will grab the market or fulfil a need? Part of the design process is to select features that solve a problem and that have been proven to work for a specific purpose.

For instance, does a search application require deep parsing in order to determine meaning, or will shallow parsing work in the majority of cases?

How can we work with potential buyers of technology to help them understand the trade-offs and choices that need to be made?

Each degree of depth requires integration with the software app and the interface as a whole. Which features (such as real nuanced language understanding) that seem logical are so difficult to achieve that they delay the launch of a valuable, market-breaking application?

To complicate matters further, features that seem elementary catch on - often, for the wrong reasons.

For instance, suppose that all I want to know is when my spouse has left the office, and what the traffic volume is today on his way home. It's pretty obvious which datapoints need to be confined for this simple bit of information.

And yet, all kinds of imponderables need to be factored into the equation, e.g., how fast does my spouse drive? Is there a repair truck in the way? To make things more difficult yet, the salient factors for a successful new application are rarely known and may be largely dependent on the user and her needs.

For instance, one of the most useful features (for me) of Alexa is having the device tune in or change radio channels while my hands are dirty. Its voice interface is a life (or dinner) saver for me.

How much is "good enough?"

There are several factors that go into our use of technology. Each of these is both a threat and a promise. For instance, a device that promises to behave to perfection, not to intrude but to augment our lives, is welcome. Assuming that the device remains quietly in the background, volunteering only when summoned, it is deemed useful. But if it intrudes (volume drowns out human activity) or, worse, threatens an activity or a human interaction, then it must be adjusted.

In the worst situations, a device or a technology may actually threaten human welfare.

The Boeing 737 MAX is a prominent example. By relying only on its design, without the opportunity to modify an outcome, the plane took lives because there were no humans in the loop.

This is an extreme example, but it is also a good lesson about how humans and machines must both contribute to the functioning of safe human-technology environments. And that's the problem.

What are the boundaries in device design and human reactions that must be built into an innovation? This is no mean determination to make.

How do you prevent risk in self-driving cars? How much should we override the next technology if it intrudes on human activities? How much should we risk reliance on smart machines in unpredictable conditions?

These are questions that we should ask now, before disasters that are preventable intrude on our lives. We need guidance on how to perform the risk-benefit analysis.

Sue Feldman is president of Synthexis and co-founder of the Cognitive Computing Consortium, e-mail sue@synthexis.com.

DocuSign acquires AI contract startup

DocuSign has acquire one of the leading contract analytics and AI technology providers, Seal Software, for $US188 million in cash.

The news builds on the existing relationship between the two companies. DocuSign already resells Seal's flagship analytics and machine learning application as part of the DocuSign Agreement Cloud - its suite of applications and integrations for automating and connecting the entire agreement process. DocuSign also made a strategic investment in Seal in March last year.

Founded in 2010, Seal employs AI-driven analytics to rapidly search large collections of agreements by legal concepts (rather than just by keywords); automatically extract and compare critical clauses and terms side-by-side; quickly identify areas of risk and opportunity; and deliver actionable insights that help solve legal and business challenges.

There are many instances of companies already utilising Seal AI in their agreement processes today. For example, one large international information-services company reduced the time spent on legal reviews by 75% thanks to DocuSign and Seal technologies.

An international telecom company based in EMEA reduced the legal review time on customer agreements by more than 80%. A global financial services leader automated the analysis of over 2.6M contractual data points for critical supplier agreements. And a global aviation supplier reviewed over 25,000 agreements in just five business days as part of a corporate restructuring.

DocuSign will continue to sell Seal's analytics application. It will also integrate and leverage Seal's AI technology to augment DocuSign CLM, its contract lifecycle management solution.

This will help DocuSign CLM to automatically categorize clauses, extract their key terms, and then use that information to drive workflows—for example, automatically routing content to specific reviewers based on risk analysis and corporate policies. Beyond CLM, DocuSign expects Seal's technology to make the AI foundation of the Agreement Cloud smarter too. Built in part by DocuSign's acquisition of technology from machine-learning startup Appuri in 2017, that foundation supports features like auto-tagging that are already offered today.

These auto-tagging tools use AI to automatically detect where to put electronic tags on a document for signatures, dates, and other fields—a task that previously required human effort and judgment. Seal's technology will add a new range of AI capabilities, driven by advanced natural language processing, text analytics, and semantic technology.

5 TIPS
FOR EFFECTIVELY MANAGING YOUR ACCOUNTS RECEIVABLE PROCESS IN CHALLENGING TIMES

ESKER®

During times of significant disruption and uncertainty, it's essential for organisations to **maintain business process efficiency** as well as communication with customers and team members. With more companies making the necessary transition to a remote workforce, it's changing the way accounts receivable (AR) teams work.

Today's unprecedented situation has had a direct impact on businesses and their ability to manage their AR process and collect cash. As a credit and collections manager, your mission is to preserve cash flow and provide the same service level to customers.

We've compiled **five tips** to help you adapt your collections strategy, continue collecting cash, take care of your customers, empower your team, and come out on top (without being impacted too severely).

01 REASSESS YOUR RECEIVABLES SITUATION

While some customers have seen little change to their operations, others have been heavily impacted and, as a result, are struggling to pay their invoices. Payment extensions and credit limits are sharply increasing. Fast action is imperative, but before diving in headfirst, you must take the time to analyse your business and understand what cash can be realistically collected, what customers you can talk to, who is at risk, etc.

TAKE THE PULSE OF YOUR BUSINESS

Start by reviewing your situation (e.g., customer categories, aging balance, at-risk cash, etc.) to make the most informed decisions and prioritise your efforts correctly. Continue to monitor daily performance evolution and cash forecasting (i.e., cash expected to come in and predictions), as it's crucial to keep an eye on your daily activity, particularly in uncertain periods and put effort and resources where they need to be. Lastly, adjust your collections category following analysis.

HOW?

Ability to report through customer categories (e.g., by industry, profile, payer rating, etc.), dashboards and KPIs help analyse your risk and orientate your collections efforts.
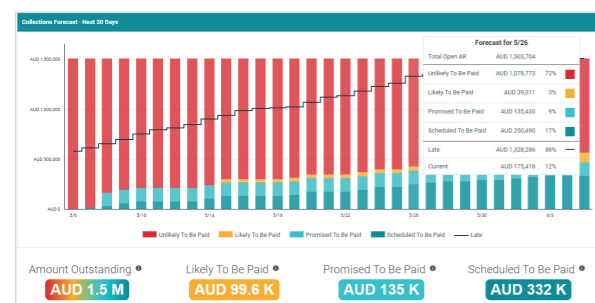
02 ADJUST YOUR COLLECTIONS STRATEGY

Your collection strategy has been set up to manage "normal" situations with a full staff. In today's current climate and when understaffed, your strategy may need to be adjusted to continue to bring efficiency to your collections process. Focus on "at-risk" customers and maintain contact with them.

TAILOR YOUR PROCESS TO COLLECT CASH QUICKLY

Your priority needs to be on collecting all the cash that can be collected, and efforts should be focused on that objective. Suspend your usual activity and prioritise activities according to your business's needs. Target the highest amounts to be collected, customers most at risk according to industry, payer ratings, or past-due (e.g., 90+ days on your aged balance). You may also need to adjust your methodology (e.g., send emails or make calls instead of mailing letters) or have your available staff focus on specific tasks.

HOW?

Adapt your collections process and change the threshold for triggering collection calls, refine call priority to focus on overdue promise-to-pay or follow-up calls and customise to-do lists.

03 FACILITATE CUSTOMER PAYMENTS

In order to help customers who are struggling with cash flow, you may have to extend payment terms. Or, if you're having cash flow issues, you may wish to offer early payment discounts to help motivate customers to pay you in advance. Anything that can help you get your cash back in is welcome.

OFFER FLEXIBLE PAYMENT SOLUTIONS

Offering your customers the ability to renegotiate payment terms and/or spread their debt with you over a longer time period, helps create a relationship where customers are more likely to meet their payment obligations and, in turn, your business eventually secures revenue. Additionally, by providing early payment discounts to customers who are able to pay earlier, you maintain a healthy cash flow.
By being customer-focused and easy to deal with, your customers will most likely want to do more business with you in the future.

HOW?

AutoPay plans give customers longer payment terms and you are more likely to receive payment at each instalment due date — a win-win situation for both you and your customers.

04 MANAGE CUSTOMER RELATIONSHIPS

It's important to talk with your customers as much as possible to find out how they are dealing with the current situation, if they have any particular problems or how they foresee the next couple of months. This allows you to find solutions together (e.g., payment plans, early payment discounts, etc.). Additionally, you may need to inform them of changes in your operating structure (e.g., new business hours, how best to contact you, etc.).
Customers will certainly appreciate a supplier who is by their side supporting them through difficult times and will be more likely to show their loyalty when business gets back to normal.

STAY IN TOUCH WITH YOUR CUSTOMERS

Based on the staff you have in place and your level of activity, you can choose to talk to certain customers in priority (e.g., industries in difficulty, highest outstanding amounts, etc.), send bulk messages to quickly reach out to a large customer base, or give customers access to a portal to access invoices, payment plans, aged balance and messages in real time.

HOW?

With access to message templates, bulk messaging capabilities and a customer portal, your collections team has more time to focus on more important tasks like talking to at-risk customers.

05 MAKE COLLABORATION A PRIORITY

Collaboration is key and with so many working from home, being on top of your internal communication has never been more important. You must ensure business continuity and provide the same level of service to customers, including making sure questions are answered in a timely manner, disputes are addressed quickly and tasks are assigned to the right team members.

ENSURE VISIBILITY & COORDINATION THROUGHOUT

It's crucial to continue collaborating with your team, share information and resolve issues, particularly around dispute or escalation calls (e.g., customers asking for installments, etc.). Teams working in silos from home with paper-based processes (e.g., Excel spreadsheets and ERP reports, printed invoices sent via postal mail, etc.) are struggling to focus on the activities that really matter — building customer relationship and getting paid faster.

HOW?

Create, assign and monitor tasks directly from the CRM-like solution, collaborate with your team and co-workers as if you were in the office (minus the free coffee!). Keep stakeholders up-to-date and ensure management can oversee team performance and ensure the collections strategy is correctly adapted to the situation.

ANTICIPATE THE FUTURE

When the situation gets back to "normal", take the time to review and see what worked and what could be improved should you be faced with a similar situation in the future.

www.esker.com.au

ENTERPRISE GUIDE

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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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INFORMOTION is an innovative professional services organisation specialising in the design and implementation of modern information management, collaboration and governance solutions – on-premises, in the cloud or hybrid. INFORMOTION's workflow tools, custom user interfaces and utilities seamlessly combine to deliver compliance, collaboration, capture and automation solutions that provide greater business value and security for all stakeholders. We can help you map and successfully execute your digital transformation strategy. Boasting the largest specialist IM&G consulting teams in Australia with experience that spans over twenty years, INFORMOTION consultants have a deep understanding of business and government processes and the regulatory frameworks that constrain major enterprises. Our compliance experience is second-to-none. INFORMOTION is a certified Micro Focus Platinum Partner and global Content Manager implementation leader. We are also an accredited Microsoft Enterprise Business Partner, Ephesoft Platinum Partner and EncompaaS Diamond Partner.

Miktsysh
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Miktysh is a multi-award winning, team of Australian records and information management specialists who deliver strategic solutions that enable simple and effective management of enterprise content, records and information. Through the provision of information systems that capture, organise, analyse and make sense of information, we deliver high performing assets that unlock the potential of our clients' businesses.

At Miktysh we are more than just software implementation specialists. We also provide strategic advice that assists organisations in increasing productivity and improving operational efficiency. Our advice equips leadership teams with the knowledge and confidence required to decide where to invest their time and resources to maximize profitability.

Together with our clients, we have delivered outstanding solutions. Since inception in 2008, Miktysh's client base has grown significantly to include many prominent local, state and federal government agencies, government owned corporations and large private corporations across Australia, proving we are top-tier records and information management specialists.

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

OPEX has developed innovative prep reducing scanners that address the root causes of workflow issues our customers face. Minimising preparation, paper handling, and other manual tasks not only improves efficiency, but also results in superior transaction integrity and information security. As documents are removed from envelopes/folders and scanned, operators can view each image to ensure it is properly captured. This prevents time-consuming and costly re-scanning later in the process. Moving image capture upstream also reduces information management risks.

UpFlow
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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 PSIcapture, Flow , Ratchet-X RPA, Doc Mgt and FileBound.

- **PSIcapture** is an innovative document capture platform engineered to combine automation, efficiency, stability and Enterprise-class scalability. PSIcapture 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 solution that provides attended or unattended Bots for the automaton of enterprise work.

- **Flow** is a fully featured Integration Platform that can connect an exhaustive list line-of-business sys-tems with each other.

ABBYY
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ABBYY is a leading global provider of technologies and solutions that help businesses to action information. The company sets the standard in content capture and innovative language based technologies that integrate across the information lifecycle.

ABBYY solutions are relied on to optimize business processes, mitigate risk, accelerate decision making and drive revenue. Thousands of companies process more than 9.3 billion pages of documents and forms annually using ABBYY technologies. ABBYY solutions and products are used by many of the largest international enterprises and government organizations, as well as SMBs and individuals.

ABBYY technologies are licensed by world-leading hardware and software vendors to provide Image Pre-Processing, OCR, Data Capture and Format conversion capabilities for their products.

ABBYY technologies and products, available on a number of platforms (mobile, desktop and server) and a variety of operating systems (Windows, Linux, Mac, iOS, Android, etc.), include FineReader, PDF Transformer, FlexiCapture, Recognition Server, Mobile Imaging SDK, Lingvo, and Compreno-based Semantic technologies.

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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 headquarters in Lyon, France and U.S. headquarters in Madison, Wisconsin and AUS/NZ headquarters in Sydney, Australia since 1997.

Esker's solutions span the order-to-cash and purchase-to-pay cycles — allowing organisations to automate virtually any business process:

- Order Processing: automated entry and routing of incoming customer orders
Accounts Receivable: automated sending and archiving of paper and e-invoices
- Collections Management: streamlined post-sale collection interactions
- Accounts Payable: automated entry and routing of incoming supplier invoices
- Purchasing: electronic processing and delivery of supply chain documents.

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UpSol are experts in Digital Transformation and Business Process Re-engineering with strong domain expertise in Data Capture, Document Management, Organisational Workflow, Electronic Forms, Data Integration and organisational change management.

We use this expertise to deliver solutions for problems in Accounts Payable, Human Resources, Contract Management, Digital Health Records, Client Management, School Management and many other core work processes.

UpSol is a trusted adviser to hundreds of companies across New Zealand and Australia.

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Information Management and Governance (IMG) specialist, iCognition Pty Ltd, helps our clients to maximise the value of their information assets, while minimising cost and risk. We use an integrated Information Management and Governance approach that combines the disciplines of data, records, and information management to value, manage, control and harness information across the enterprise.

iCognition's Electronic Document and Records Management System-as-a-Service (EDRMSaaS) represents 20 years of iCognition experience. It is a proven, secure and trusted Software-as-a-Service offering for Content Manager. It can also include iCognition's award-winning RM Workspace for secure web-based end-user access and collaboration, Office365RMBot for fast and easy information governance of Office 365 information, RM Workflow to deliver easy-to-use Content Manager workflows, and RM Public View for publishing and sharing to non-Content Manager users.

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DocsCorp is a leading provider of productivity software for document management professionals worldwide. Our offices and products span the globe with over 500,000 users in 67 countries. Our clients are well known and respected global brands that rely on DocsCorp for their technology needs.

Our mission is to provide document professionals who use enterprise content management systems with integrated, easy-to-use software and services that extend document processing, review, manipulation and publishing workflows inside and outside their environment to drive business efficiency and to increase the value of their existing technology investment. Our solutions include:

- **contentCrawler** - intelligently assesses image-based documents in content repositories for batch conversion to text-searchable PDFs, making every document searchable and retrievable

- **compareDocs** - delivers unparalleled levels of efficiency and accuracy in the document comparison process
cleanDocs - provides a high level of confidence that metadata is cleansed from confidential or sensitive documents before being sent externally.

FileBound
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FileBound is a cloud-native, work automation and document management solution that can be used to underpin any organisation's digital transformation program.

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), advanced business system integration capabilities 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 customers have the flexibility to create a variety of solutions from complex AP automations to simple document archival and retrieval processes.

Twain Scanning SDK for Web apps

Australian company Knowledgeone Corporation has released a cross-browser TWAIN Document Scanner Software Development Kit (SDK). Web, 'thin' or browser apps cannot easily connect to resources on your local PC or network like a TWAIN compliant document scanner. Many smaller developers just do not have the money, resources or expertise to develop this functionality themselves and cannot afford the high cost of current SDKs.

The Web TWAIN SDK includes the ability to scan, capture, modify images, OCR images, convert to PDF format and upload to the developer's application on the server.

In short, everything you need when working from a browser to convert paper to digital and to capture and store the final document. The comes with all the necessary code, a sample app and twelve months of free support and updates. Only the developer is licensed, not the end users and there are no restrictions on distribution of the runtime.

There is a single upfront fee (not an annual license that needs to be renewed each year) and a maintenance agreement (after the initial twelve months) is entirely optional. A demo program is available to download HERE

ACA Pacific adds Entrust Datacard

Technology distributor ACA Pacific has announced an agreement with Entrust Datacard to cover the Australian and New Zealand markets. ACA Pacific is an ongoing Distribution Partner for Entrust Datacard in its Asian operations. In the AZ markets ACA Pacific will focus on Entrust Datacard's authentication and certificate solutions.

Entrust Datacard's authentication solutions secure and enable digital business with a single identity assurance platform that enables customers to manage users, apps and devices from a single flexible platform, providing best-in-class security and an easier user experience.

Entrust Datacard Certificate solutions establish and maintain a trustworthy networking environment by providing key and certificate management services that enable encryption and digital signature capabilities across applications for organisations ranging from large enterprises to governments and financial institutions.

ACA Pacific has an established Partner base and an experienced national team, having worked on many Finance, Government, Education and Defence projects.

While Entrust Datacard's traditional focus has been on Enterprise accounts, ACA Pacific aims to expand the channel by offering their solutions to new SMB and SME focused Partners.

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ActivePDF announces DocSpace Online

ActivePDF has announced the launch of DocSpace Online, a free PDF tools application that anyone can use in their favourite browser, on virtually any computer, tablet, or phone.

DocSpace Online can instantly be used by anyone without the need to register an email or credit card.

DocSpace Online Key Features include:

■ **Combine PDF –** Merge multiple PDF files or pages together and combine them in any order according to your specifications. This is helpful when trying to put together many different files. As a helpful workflow, users can convert many different file types to PDF and then use this tool to combine them all.

■ **Convert to PDF** – Easily drag-and-drop the following file formats into any favorite internet browser, such as Chrome, Edge, Safari, or others and let the DocSpace engine do the rest: Excel, Word, PowerPoint, Image, PCL, Text, Visio, and XPS.

■ **Convert from PDF** – Quickly and easily convert PDFs to the following file formats: Word, Excel, PowerPoint, Image PDF, Bitmap, JPG, TIFF, PNG, PCL, PostScript, PDF/A. This is helpful for going in and out of different file types so users are never stuck trying to get data into another document file type.

■ **Compress PDF** – Significantly reduce PDF files sizes with a few clicks. Many PDF files are over 5MB, which can get blocked by email servers. This technology can quickly compress large PDF files as much as 95% with great quality.

■ **OCR PDF Text** – Convert PDF or image files to searchable text using Optical Character Recognition (OCR) software technology. If users are stuck with scanned images or text-heavy documents, it's easy to full-text OCR that text and use it for search, extraction, and other features. Users can take a picture of text, convert to PDF, then OCR that text for a simple workflow.

■ **PDF Accessibility** – Convert PDF files to PDF/UA to make them accessible to assistive reader technologies.o those who have visual challenges or learning disabilities and need content converted into the right reading format so the software understands how to communicate the data on the document.

Start working in DocSpace Online for free at DocSpace.cloud.

Box Launches looks to Simplify Work

Box, Inc. has introduced the All-New Box experience to power increased productivity and collaboration. The announcement introduces Collections, a simple way to organize files and folders around the topics and work streams important to you; the ability to add annotations to 100+ file types directly in Box Preview; and an enhanced Zoom integration that makes it easier to collaborate on content while face-to-face on video.

The All-New Box experience features a simplified, redesigned user interface that enables personal productivity by making it easier to navigate Box. In addition to enhancements like a new action bar design, refreshed icons, and advanced preview capabilities for Zip and RAW file types, the All-New Box introduces Collections, a new way to personalize and organize content in Box.

Available in public beta, Collections allows users to create and name a dedicated space for projects or related content within Box. Users can add files, folders, or bookmarked documents into one or more of their personal Collections without impacting collaborators' access to those items in Box.

For example, a user might want to group documents and folders around projects or ongoing processes in Collections called 'Event contracts', 'Marketing launches' or 'User research studies'. With Collections, the user can personally organize the information they need to be productive, all easily findable in the left-hand navigation on Box.

The All-New Box experience delivers a streamlined solution to the challenges of distributed content and teams.

■ **Annotations:** A core piece of collaboration is the feedback and review process. With Annotations, users can leave free-form mark-ups and text comments directly in Box when previewing more than 100 different file types. This replaces the need to use external applications to leave annotations directly in content. For example, instead of opening an application to comment on the time stamp in a video, line in a PDF, or slide in a deck, users can comment directly from Box Preview.

■ **File Request:** Box File Request is a safe and secure way to receive files and metadata from collaborators outside an organization or without a Box account. This replaces clunky FTPs, expensive custom portals, or slow paper-based submissions. Box File Request allows users to send a link to request files from outside the organization. Submitters then drag-and-drop files which are saved directly in Box. Supplemental information automatically adds as file metadata which can trigger workflows and make that piece of content more searchable within Box.

■ **Enhanced Box and Zoom integration:** Usage of the Box and Zoom integration, which debuted last year, has grown dramatically over the past few months as more teams work remotely. The enhanced Box and Zoom integration allows users to create or join a Zoom meeting directly from a piece of content in Box with a simple click from Box Preview.

https://blog.box.com

EzeScan partners with PaperCut Software

Outback Imaging, the home of EzeScan Enterprise Capture, has announced a partnership with PaperCut, the innovative print management software provider that allows users to track, control, and enable more thoughtful printing.

This collaboration provides PaperCut customers with seamless access to EzeScan's digitisation for Records Management within the PaperCut MF Embedded application.

For the end-user, this means a single interface to work from at the multi-function device and access to 30+third-party integrations that EzeScan offers.

With the power of EzeScan, users throughout any enterprise can effectively capture any type of document and extract/validate/index documents and upload them in the right place where they need to be stored and actioned.

Processes can be manual, semi-automatic or fully automatic, depending on the required business process. With no third-party apps to install or manage,

EzeScan appears as an additional button within PaperCut that acts as a gateway to an organisations line of business needs.

Workflows can be simple, broken down across multiple users, or even directed to a backend server for handling and routing to others.

PaperCut users can now extend their capabilities to not only capture from their MFD but from any location using the home/mobile capture capabilities of EzeScan to ingest both hardcopy and digital-born information direct into their line of business workflows.

https://www.ezescan.com.au/solutions/decentralised-capture/papercut

Sign Documents on Live Video Calls

A new live video signing feature protects companies against fraud and contract disputes while maintaining social distancing. Secured Signing live Video Signing gives users the power to sign legally binding documents on a video call.

Mike Eyal, the Managing Director of Secured Signing, said data showed companies were shifting more of their work online due to COVID-19.

This shift has been driven by many countries updating their electronic signatures acts to allow documents to be signed and witnessed over video calls.

Digital signatures provide built-in proof of the signer's identity and intent. Live Video Signing comes with even stronger identity verification features, making it difficult to dispute contracts.

This protection, known as non-repudiation, means the identities & intent of everyone signing the document are confirmed and recorded. So, no one can later deny signing the document.

Secured Signing's Video Signing also delivers a better customer experience with the signing meetings on the all-in-one platform able to be setup in seconds allowing more time to go through details of the contract and clearly explain them.

https://securedsigning.com/products/video-signing

Datalogics HTML To PDF Conversion

Datalogics has launched a new version of FLIP2PDF, a scriptable server tool that gives users better control over their file conversion process. The latest release (version 1.3) offers HTML to PDF conversion. Sending, sharing, and reviewing websites among your coworkers or clients can be challenging. By offering an easy bridge from HTML to PDF, FLIP2PDF allows you to build a workflow where you can pull data in HTML form, either directly from the web or as generated from other sources, and easily convert that to PDF for long-term usage.

Additionally, since most websites are in constant state of change, using FLIP2PDF to document what a website had posted previously provides a convenient way to store that information when it inevitably gets removed from its original source.

FLIP2PDF now supports HTML to PDF conversion:

■ Adds the ability to convert HTML to PDF from a local file or URL

■ Adds support for configuring: Output page size, Output page orientation, Output page margin size, Web layout view (affects layout of page before conversion), Image downsampling, Image compression.

■ Here are some additional use cases for HTML to PDF conversion, which may include:

■ Creating print versions of a dynamic web page

■ Creating user guides and specifications

■ Sending and receiving customer information

■ Representing electronic records

The ability to easily convert HTML to PDF can also help you digitally transform your workflows, whether it be through data-entry automation or form-filling capture. When you're able to swiftly and easily convert HTML to PDF, you will discover auditing capabilities that can help you achieve complete digital transformation.

Request a free evaluation at datalogics.com.

Semantik Invoice to Automate AP

Ephesoft has announced the availability of Semantik Invoice, a cloud-based data acquisition product with an out-of- the-box artificial intelligence model designed to reduce costs by 30% and significantly cut the time to process an invoice while achieving accuracy by over 97%.

For companies looking to automate their AP process, Semantik Invoice extracts critical data from any invoice format and imports the data into Enterprise Resource Planning (ERP), Enterprise Content Management (ECM), Robotic Process Automation (RPA), workflow tools and other line of business systems for downstream processing.

Ephesoft's proprietary AI-powered reader

technology accurately recognizes key fields such as invoice date, terms, ship date, tax rate, tax IDs, overall amount due, purchase order number, etc. While most capture solutions require significant professional services work or customizations to set up, Semantik Invoice is a low-code, no-code solution that can be deployed and used in a production setting in minutes.

The product makes it possible to streamline AP processes to see an immediate return on investment by using the scalability of the cloud combined with advanced machine learning algorithms. It also ensures the extracted data can be used in any future process automation or AI project through Ephesoft's semantic data-driven extraction approach.

Ephesoft is currently developing the next stage toward autonomous work, which automatically identifies relationships between recognized entities to create a web of knowledge supporting business processes.

https://ephesoft.com/products/semantik-invoice/

Epicor updates DocStar ECM solution

Epicor Software has introduced a new version of the DocStar Enterprise Content Management solution, including an upgraded user interface, enabling teams to work smarter from any location.

The new user interface helps make document management and automated accounts payable solutions in the cloud or on-premise easier to use, and enables customers to create and process secure e-forms to capture, verify, approve, and integrate data and processes with core business systems remotely.

In addition to the new user interface, the enhancements featured in DocStar ECM 20.1 include:

■ Epicor IdP/MFA Ready—More secure and easier user login management. Epicor Identity Provider Integration (IdP)/Multi-factor Authentication (MFA) support will be available with the release of the Epicor Identity Provider (IdP) service

■ Epicor ERP AP Automation Enhancements— Workflow optimizations and performance enhancements for the Epicor ERP AP Automation solution.

■ Regional Numeric/Date Handling—View numbers/ dates in multi-regional settings with this new user preference.

■ Workflow Application of Stamps—Apply Image and Text stamps automatically as part of conditional rules-based workflows.

■ Auto Match Workflow Capability—New automatic receipt matching capability for AP Automation solutions further reduces or eliminates manual receipt selection/data entry.

https://www.docstar.com/

Dynamsoft Capture for Mobile Devices
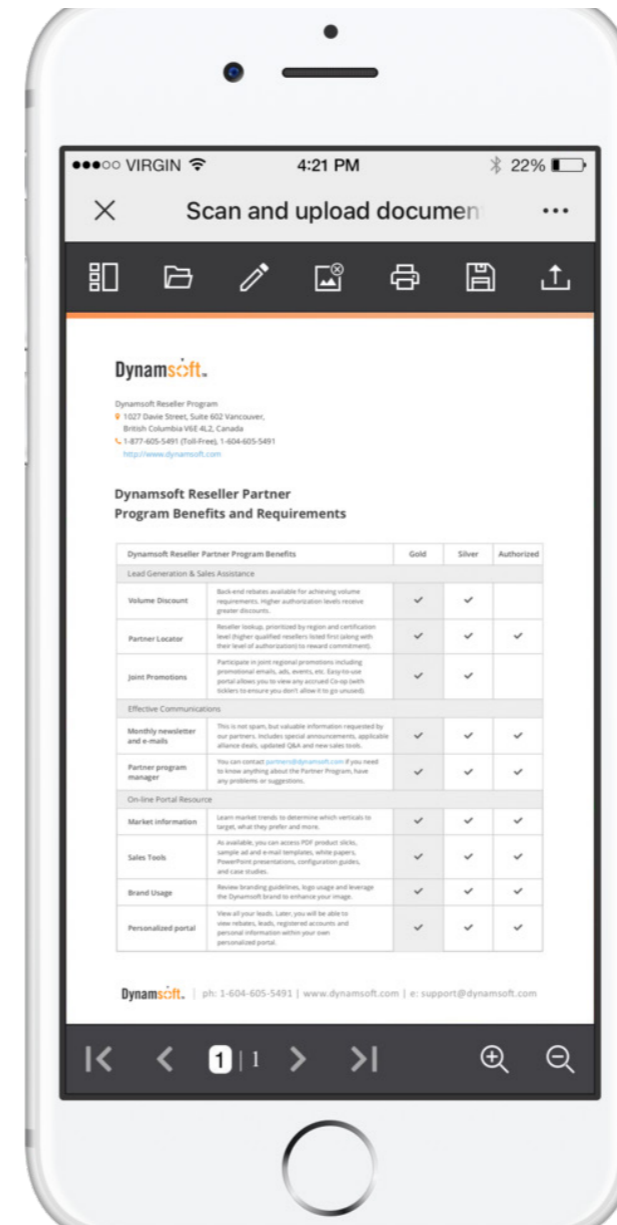
Dynamsoft has updated its document capture and management software development kit to allow desktop capabilities to be possible on mobile browsers too.

This includes full document loading, image capture, editing, and saving functions for enhanced mobile workflows and productivity. Starting with version 16 of the Dynamic Web TWAIN software development kit (SDK), users can capture documents from within a browser on an Android or iPhone smartphone, or for iPad. So, users can experience enterprise-class document management features from their mobile devices. This includes now being able to conveniently digitize a document to the PDF format using a camera smartphone.

At the heart of this is a new image viewer. It provides a unified document capture and management experience across Windows, Linux, macOS, Android, and iOS. Desktop viewer capabilities are extended

to mobile browsers that include Chrome 76+ and Firefox 68+ on Android, and Safari 13.1+ and Chrome 76+ on iOS.

Several other updates were made under the hood to accommodate desktop features to be unified to mobile platforms. For example, for the desktop workstation era, the Dynamic Web TWAIN core modules were originally developed in C++. But to accommodate a more mobile world, all the core modules have been compiled into their respective WebAssembly (WASM) counterparts.

Dynamic Web TWAIN provides cross-browser and cross-platform document scanning support for web applications. Developers need only write a handful of lines of JavaScript code to enable document scanning, uploading, editing, and processing across Android, iOS, Linux, macOS or Windows devices.

Users can scan documents from TWAIN, SANE and ICA-compatible scanners using a variety of browsers: Chrome, Firefox, Edge, Internet Explorer (IE), or Safari. Users can also edit captured documents and save the images in various file formats such as JPEG, TIFF, PDF, and more.

http://www.dynamsoft.com

Compliance Connector for Microsoft Teams

Ediscovery vendor Epiq has announced the launch of Epiq Compliance Connector for Microsoft Teams, a proprietary tool that connects Teams deployments with an organization's compliance and eDiscovery processes. Epiq Teams Compliance Connector threads Teams chat messages and is claimed to be one of the first applications to identify and collect modern attachments (e.g. links to files stored in Microsoft OneDrive, Microsoft SharePoint or Microsoft Exchange) and connect them to their associated Teams messages for eDiscovery purposes.

Epiq Compliance Connector for Microsoft Teams helps to thread, identify, collect and connect the ever-growing number of messages in Teams, speeding the process for eDiscovery involving this emerging collaboration tool.

Key features include:

■ Conversation threading: Teams messages are connected together for streamlined review in various eDiscovery platforms.

■ Intelligent version handling: Epiq Compliance Connector for Microsoft Teams collects modern attachments from OneDrive and SharePoint with intelligent version handling.

■ eDiscovery compatible: Output can be presented in a logical HTML and PDF format mirroring the native Teams environment, or the output can be made available as an eDiscovery load-file for document review platforms.

https://www.epiqglobal.com/en-us/experience/ regulatory-compliance/compliance-connector

File Analysis Solution for Unstructured Data

Gimmal, a Houston-based provider of information governance and compliance software, has launched a new file analysis solution, Gimmal Altitude.

Altitude will provide users with the ability to manage unstructured data across the enterprise by discovering and analyzing content in all corporate data sources to reduce risk and improve organizational efficiency.

This solution allows users to easily gain visibility into the masses of content they have and make better decisions to eliminate unnecessary data and govern information properly.

Key features of Gimmal Altitude, include:

■ Discovering valuable business information buried in unstructured data sources

■ Identifying redundant, obsolete, and trivial information

■ Classifying critical business content to ensure proper information governance

Gimmal Vice President of Client Success, Sheander Tou, stated, "A successful information governance program starts with an understanding of enterprise data. File shares still hold the majority of data in an organization but, with Gimmal Altitude, this data can be analyzed and acted upon to support mature *information governance."*

https://www.gimmal.com/gimmal-altitude

MS Universal Print taps ControlSuite

Kofax is teaming with Microsoft to allow Microsoft Universal Print users to leverage Kofax ControlSuite, the company's print management and cognitive capture software solution, across a wide range of printers and multi-function devices (MFD).

Universal Print, Microsoft's cloud-based print infrastructure, is currently in private preview and will be available soon to Microsoft 365 users.

When combined with Kofax ControlSuite, IT departments don't need to dedicate time and resources to configure print servers and local devices, thus alleviating print administration effort and expense.

Kofax ControlSuite works across s comprehensive range of printers and multi-function device (MFD) brands and models, as well as mobile devices, and adds to this seamless experience.

Kofax ControlSuite's ability to provide print management, cognitive capture and output management means printing, scanning, content extraction and document workflows can be automated across any combination of hybrid systems and technologies.

These include printers, MFDs, mobile and desktop devices, email and print streams.

Hyland updates OnBase Foundation

Hyland has released OnBase Foundation Enhancement Pack 3 (EP3) and Content Composer Foundation EP1. Developments within the latest version of OnBase Foundation include:

■ New Accounts Payable (AP) solution offerings: A new solution for Infor CloudSuite Financials users delivers PO and non-PO posting to Infor; and Brainware integrations support automated data capture. Enhancements to the Hyland AP solution for Workday enable users to post credit memos directly to Workday. Also, Deltek Costpoint users can now leverage cloud AP solutions.

■ Compliance enhancements: The release features key updates to bolster responses to retention and compliance initiatives, including the ability to set permanent retention on documents; new functionality within Hyland's governance solution, Governance Rules as a Service (GRaaS); and new reporting capabilities within the OnBase policy and procedure administration solution.

■ Additional integration choices with Content Composer, Hyland's customer communications management (CCM) product

■ New REST APIs: This release features the first in a series of REST APIs, making it easier to integrate line-of-business systems with Content Composer to create communications.

https://www.hyland.com

FlowForma Process Automation in APAC

FlowForma has announced a partnership with solution provider MicrotechDPS, to deliver the FlowForma Process Automation tool for Office 365 to organizations in Australia and the greater APAC region. FlowForma provides 3-in-1 tool that combines forms, workflow and document generation for Office 365 with a no-code methodology and rapid prototyping capabilities.

MicrotechDPS has selected FlowForma to deliver process automation to those who already have, or are considering moving to, SharePoint Online.

Headquartered in Dublin with offices in London and Boston, FlowForma plans to ramp-up operations in Australia and surrounding countries in the APAC region.

"We are thrilled to be working alongside FlowForma to provide our clients across Australia and the APAC region with a powerful process automation tool, to automate their business processes. From our initial conversations we could clearly see similarities in our customer base and the industries with which we serve, it was a unanimous decision," said Joel Steers, General Manager, MicrotechDPS.

For further information or a 14-day free trial, visit https://www.flowforma.com/

INfuse enhances Remote Work Solution

Xenith Intelligent Workplace Services has partnered with Kodak Alaris to create a pre-configured Scan@Home Solution built on INfuse, the global information capture specialist's Smart Connected Scanning Solution. The platform enables remote workers to scan directly into line-of-business systems from their home offices.

Companies can now use a fully managed service to provide pre-configured scanners to virtual employees.

All workflows - such as sending the document to the right person, or saving the information in the correct repository, network drive, or back-end system are pre-configured remotely by Xenith. Xenith connects the software or line-of-business applications such as invoice processing, records management, or customer account management with APIs from Kodak Alaris to create a full solution which is completely serviced, controlled and programmed through its cloud service in Microsoft Azure.

INfuse management software from Kodak Alaris allows Xenith to manage the fleet, set up the workflow, configure the devices, and allocate licenses - all hosted and operated by Xenith.

The system is continuously monitored with notifications to ensure seamless functionality and if company processes change, Xenith can alter workflows remotely so the end-user stays hassle-free.

https://www.xenith.co.uk/support-mobile-workers

Fuji Xerox APAC teams with M-Files

Fuji Xerox Asia Pacific has announced a partnership with M-Files to provide automated workflows and information management solutions deployable in the cloud, on-premise or both.

M-files promises AI features that intelligently tag, search and organize content with metadata based on what the content is, not where it is stored.

Users can connect existing repositories and systems, such as network folders and SharePoint, and access information "in-place" through a single view, without costly data migration.

Hyland offers free cloud collaboration

Hyland is offering a free subscription to ShareBase for all organisations until at least July 1, 2020. to enable remote work during COVID-19. The offer is available for any organisation seeking technology to support work-from-home policies by keeping users connected, content accessible and critical processes moving forward.

Leveraging ShareBase, organisations gain a simple and secure way to share information and collaborate with both internal and external users. Built on a low-code, cloud-based platform, ShareBase is quickly deployable, providing newly remote employees with the critical content they need to do their jobs from anywhere and any device.

ShareBase incorporates high-security protocols with complete control and visibility over content and processes. Once implemented, organisations can manage users within an identity provider (IdP) product to ensure retention and ownership of all shared information and mitigate the risk of unauthorised access to information.

https://www.hyland.com/resources/covid19

Data management for unstructured data

Igneous, the SaaS data management company for file-intensive environments, has announced enhancements to DataDiscover and DataFlow. Igneous DataFlow now enables data-heavy organizations to move data in native format from where it lives to where it needs to be, on-premises or cloud. Moving data is hard: it requires numerous tools and operational oversight. Legacy tools are complicated and can't provide high-performance data movement without costing more than storage itself. As organizations continue to accrue more file data, solutions allowing users to search for their data have not been able to keep up, so users spend 30% of their time just looking for their data.

Igneous DataDiscover and DataFlow enhancements promise full visibility into their data anywhere it lives, and the ability to move data to anywhere it needs to be. DataFlow and DataDiscover complement the Igneous suite of SaaS offerings, helping organizations take control of their data at scale.

Igneous DataFlow is geared toward data-heavy organizations that are always moving data between on-premises and cloud storage. These organizations require a fast, simple, and scalable way to move data in native formats at low operational costs.

Igneous DataFlow enables organizations to leverage new NAS devices and use cloud filesystems or objects without vendor lock-in. DataFlow is tier-agnostic and system-agnostic. Igneous DataDiscover provides visibility for all data to make intelligent decisions.

https://www.igneous.io/unstructured-data-discovery-solutions-datadiscover

Fast & Efficient Document Management

EPSON **WorkForce** Business Scanners

The professional's choice for easy, fast and reliable document scanning.

- Advanced paper handling
- Superior image processing
- Ultra-fast and efficient
- Includes Document Capture Pro to scan directly to the cloud

Learn more visit
www.epson.com.au/scanners

EPSON **WorkForce** DS-70000

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EPSON **WorkForce** DS-570W

Document Capture PRO