



## Data

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EARS OF AI

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MAILROOM  
MADE EASY

ACHIEVING  
SUPPLY CHAIN  
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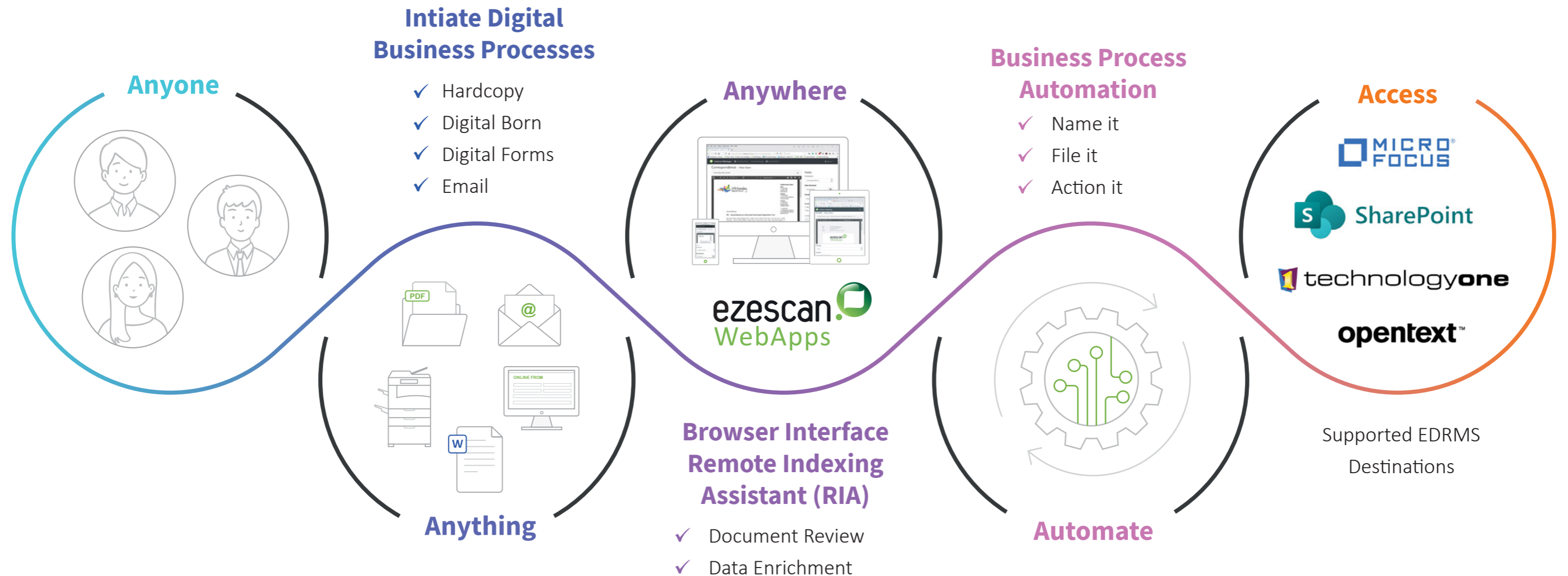
## Industry Profile: Outback Imaging CEO Mike Kirkby.

How the data  
industry strips  
away our  
freedoms

Defence drives  
ahead with Army  
Records digitisation  
program

ANAO report  
critical of  
Government  
purchasing

# A new approach to records capture



Automatically align information capture with your business processes

# ANAO report critical of Government purchasing

The Auditor-General has zeroed in on the performance of the Digital Transformation Agency and two other Commonwealth Departments in a report on the use of procurement panels and arrangements for expenditure on ICT related goods and services, which totalled over \$A3.9 billion for the Australian government in the 2018-2019 financial year.

The DTA was criticised for failing to ensure that suppliers were treated equitably and its staff handling the process did not "have sufficient understanding of the procurement requirements, the nature of the arrangement being established and procurement related risks."

It also found examples where Department of Home Affairs and the Department of Industry, Science, Energy and Resources had not given sufficient consideration to competition between suppliers to drive value for money.

Of the \$A3.9 billion worth of contracts published on AusTender in FY 2018-2019, more than 36 per cent of reported contracts, involving over 17 per cent of reported contract values, were identified as having been drawn from a panel.

The audit assessed selected components of the establishment and use of two ICT related cooperative procurement panels:

- the IT Services panel established by the Department of Infrastructure, Transport, Regional Development and Communications (Infrastructure); and

- the Digital Marketplace panel established by the Digital Transformation Agency (DTA).

The audit also examined whether Infrastructure and DTA established effective monitoring arrangements to enable them to assess whether the panels or arrangements met their objectives

The ANAO examined a sample of 15 procurements - five from each of the two panels examined and five procurements made under the IBM Whole of Australian Government Arrangement. Out of these 15, it found

three did not comply with Commonwealth Procurement Rules (CPRs).

"When using such arrangements, entities need to adopt processes that are not just technically compliant with the CPRs but are also consistent with their intent, which is to drive value for money through competition," the report notes.

"In relation to the use of the selected arrangements, entities largely complied with the CPRs to support the achievement of a value for money outcome. For one procurement, documentation did not fully demonstrate that the conditions for limited tender were met. In two other procurements, there was limited evidence supporting value for money considerations. In these three cases it was difficult for entities to demonstrate that the procurements achieved a value for money outcome. There were instances of entities not meeting requirements regarding the approval of variations to contracts, record keeping and AusTender reporting. There was also scope for some entities to strengthen their consideration and management of risk and probity."

"DTA's planning and approach to market for the establishment of its Digital Marketplace panel did not comply with all of the CPR requirements but did demonstrate the adoption of a number of key sound practices identified in Finance guidance. The planning and approach to market did not support the achievement of a value for money outcome. DTA documented clear objectives for establishing the panel and approached the market to conduct an open tender which encouraged competition. However, DTA's request documentation did not require suppliers to provide price information and DTA was therefore unable to conduct a value for money assessment in accordance with CPR requirements. Additionally, suppliers were able to join the panel based on different requirements - this resulted in not all suppliers being treated equitably, which is inconsistent with the CPRs."

During the course of the audit, the ANAO was advised by the Department of Finance of allegations of fraud related to the supply of information technology contractors. Investigations are ongoing it says.

The full report is available [HERE](#).



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# A revised working definition of Digital Transformation

By Mark P. McDonald, Gartner, Inc.

**Digital transformation, everyone talks about it, wants to sell it wants to do it, but what is it really. The term digital transformation has become a catch call, a term used to get budget, an easy handle to talk about the next iteration of what we have done before.**

COVID has increased interest and investment in digital transformation. The question is what kind of digital transformation. The concern is that companies get the right kind of digital transformation.

The current definition of "Digital business transformation" is the process of exploiting the latest digital technologies and practices to create a robust new digital business model. The emphasis is on transformation as a process using the latest technologies. Not all that different from what companies have done in the past.

The current working definition, shown above, is practical and pragmatic. It is also narrow and limiting. Narrow in the sense that they see digital as being something different from what came before – analogue. Limiting as it concentrates on substituting digital technologies for prior IT centric technologies.

The focus remains on business process automation, applying intelligence and doing old things in new ways. Digital in this sense remains a noun, something you can buy, apply and become.

Digital transformation in this sense is a series of digital transactions, different yes, but not fundamentally different from what existed before. It's an established playbook with a new cover.

The familiarity of this definition appeals to many. In this way of thinking, companies become digital through their investment and installation of digital tools and solutions. They use the latest technology to do things faster and cheaper, which is equated to being better.

## Digital transformation tomorrow – a next generation not a reiteration

A different definition centres on creating new combinations of the information based and physical based resources. Those combinations created new avenues for creating value, realizing revenue etc. Avenues based on seeing, thinking and doing things differently. It is a definition argued in the eBook "The Digital Edge."

Current definitions of digital transformation treat digital as a noun. A noun means it's a thing, you can buy, install and operate. Digital is an adjective created through applying information and connectivity to anything. That definition creates an open and expansive definition. Open in the sense that anything can become digital. Expansive in recognition of all the things that you can do when things become information intensive and connected.

In this sense digital transformation is as much a way of thinking as it is a way of working. Consider the use case of touch-less delivery.



Digital as a noun describes the things you need to buy and install: a mobile phone app, location services, improved inventory visibility, new shopping bag materials, etc. Buy these things and you will get touch less delivery capability just like someone else who buys the same things.

Digital as an adjective creates a different view. Like a noun, there are the things you need now, but more importantly it leads you to think beyond the operational process. Touch-less delivery creates new information about when, where and who wants the products, what are the trends, how do I enhance inventory placement, what changes do I need from my suppliers etc.

The difference matters. A noun-based approach gives you the ability to have people buy things overcoming their concerns about infection. It's a new sales and service channel without necessarily resulting in more revenue.

An adjective-based approach goes beyond that to think about how better to manage inventory, suppliers and consolidation to be different in ways that matter to my customers, my suppliers and most importantly to my competitive advantage.

## Why does the definition of digital transformation matter now?

Digital transformation is in demand. The Covid-19 crisis shows a company's digital gaps and seams creating the need for investment. In April 2020, Microsoft's CEO Satya Nadella observed "We have seen two years' worth of digital transformation in two months."

It was part of Microsoft's First Quarter earnings report. That transformation is about people buying stuff, using the cloud etc. It is concerned with the consumption of digital nouns. That is fine, but there is so much more possible if we only use a different definition.

Mark McDonald, Ph.D., is a Vice President and Fellow Emeritus in Gartner for General Managers Program.



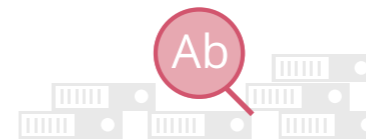
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Captures paper documents and converts them into searchable digital files that include metadata, and which are optimized for digital archiving and records management processes.



### 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



# Driving ahead modernised systems at Bathurst Regional Council

**Bathurst Regional Council (BRC) in 2018 was a Local Government Authority (LGA) facing a pressing need for technology modernisation.**

Located in the Central West region of New South Wales and servicing a population of around 43,000, the council's financials property and ratings platform needed a major upgrade. In addition, the EDRMs was out of support, desktop hardware, operating systems and software were outdated and there was a keen desire to move nearly 400 networked users to the Office365 cloud.

Newly-installed Manager Information Systems Michael O'Neill was faced with a choice, tackle all these tasks individually or go for the big bang approach. He chose the latter which made for a challenging 2019.

"It was a big year for us, probably too big. Maybe I was a bit too ambitious, but we got through it," said O'Neill.

"A lot of change happened, it was like literally pulling the Band-Aid off, you get stuck in quickly and tolerate some pain to get the right changes in place."

These changes included planning for the upgrade Civica Authority 6.11 to 7.1, migrating from HP TRIM 7 (released in 2010) to Content Manager 9.3, and replacing Lotus Domino with Office 365/Exchange Online. There was also a complete desktop hardware and software upgrade and replacement of mobile PCs.

## Integration drive

One of the key objectives was to streamline integration architecture and configuration with Council's Line of

business systems and the EDRMS.

Solution provider Information was engaged to manage the EDRMS and Office365 migration projects as well as middleware integration to allow workflows between the EDRMS and Council's Web site.

BRC needed to locate expertise for Lotus Notes/Domino groupware migration to Exchange Online, upgrading HP TRIM to Content Manager 9.3, and integration with the Civica Financials Platform. All three platforms have integration aspects and locating business partners across these requirements was proving difficult.

The email and EDRMS updates needed to be complete as prerequisites for a scheduled upgrade to Civica's Authority version 7 later this year. In addition, there were several integrations with the HP TRIM application which were not going to function after upgrading to Content Manager.

BRC was faced with uncertainty over the cost and availability of updating these separate vendor solutions. Information's Fusion integration engine was identified as the solution to consolidate and simplify these separately licensed and supported integrations.

Working closely with the team at BRC, Information first migrated all Lotus Notes/Domino user mailboxes to Exchange Online/Office 365. The deployment occurred over a pilot and 4 live stages allowing the BRC IT to support the business as it transitioned.

Devices that route mail messaging via the organisation's email platform were identified, monitored, and updated to point to the new mail platform.

## EDRMS upgrade

The second phase was the upgrade from TRIM 7 to Content Manager 9.3.3. This was delivered as a migration to new infrastructure, allowing the pilot and UAT to occur in parallel with ongoing daily use of the TRIM 7 environment. The cutover to Content Manager occurred smoothly with BRC delivering their own custom upgrade training to all personnel just prior to going live. All third-party integrations were transitioned cleanly with assistance from Canberra's Preemptive Consulting to manage BRC's custom email connection to Content Manager.

Once these two phases were complete, Information deployed Fusion its integration engine for Content Manager, with the first task to replace the legacy TRIM integration which exports appropriate file content out of the EDRMS to the cloud-based CMS used for the council's public Web site.

BRC also took advantage of the powerful Content Manager Web application to replace a custom link generation middleware webservice which was previously providing document-specific links from the intranet. A simple find-and-replace across the intranet content to update the link syntax is all that was required.

Fusion has also replaced the Civica Authority "push" integration function into Content Manager. This will introduce a more robust integration, as well as delivering better and more complete support for the organisation's Content Manager registration forms. The legacy integration requires the use of forms which do not enforce required data capture. This has historically resulted in poor data capture into the system and an increased retrospective workload for the Records team in monitoring and manually correcting metadata.

"We are about halfway through the process of moving people away from using local file server storage to SharePoint Online in OneDrive," said O'Neill.

"Our Big Bang migration took about 15 months all up and was completed at the start of 2020. We trained everyone on Teams and then of course nobody used it. Then COVID came along and I've had more than one person say wasn't it lucky you took us to Office365 and teams!"

"We also took the decision to supply all staff in 2019 with a headset and camera for their screens so we weren't scrambling to find these things which became scarce as soon as COVID hit. Another bit of good fortune was holding off on selling about 60 HP laptops that were replaced by Lenovos last year, so we had them to distribute to staff working from home via Microsoft Direct Access Server.

"It was fortuitous that we had put in the collaborative suite of software that really helped us adapt to COVID."

BRC now has staff split across four major sites in Bathurst including the Mount Panorama complex, normally buzzing every October with crew teams for the famous race.

The platform modernisation has delivered BRC the opportunity to leverage technology to streamline current processes in both the planning department and records, with flow on effects across the organisation.

# Fusion makes Content Manager integration simple

Integrating Content Manager with business systems delivers benefits greater than the sum of their parts...if only you could minimise the complexity, cost and time to manage these integrations.

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## Purchasing revolution for Australian Rail



The Australian Rail Track Corporation (ARTC) has enlisted TechnologyOne to digitally revolutionise its procurement systems across the 8500km national freight rail network.

TechnologyOne software will replace manual and paper-based processes across procurement including corporate, maintenance, emergency procurement, materials procurement, professional services and all project-related purchasing.

The move is the result of a comprehensive review by the ARTC which will see all procurement streamlined and maximised across the company.

ARTC Group Executive Corporate Services and Safety Kylie Gallasch said ARTC chose TechnologyOne because it needed a proven, secure SaaS solution robust enough to handle large and complex projects involving thousands of suppliers and transactions.

"TechnologyOne's solution will allow us to increase the efficiency and effectiveness of our procurement processes as we deliver major Australian rail infrastructure projects right around the nation.

"We needed a digital solution that was up to challenge, and one that could streamline and maximise efficiency across complex projects," she said.

"It also made sense to go with a solution that will integrate with our other systems. We've had a long history with TechnologyOne, and felt they understood our business," Kylie Gallasch said.

ARTC has also enlisted TechnologyOne to deliver a new Project Lifecycle Management Solution for another of its major infrastructure projects - the \$A400 million duplication of the rail freight line between Botany and Mascot in Sydney and one of the country's busiest freight corridors.

Implementation of the TechnologyOne Procurement and Project Lifecycle Management solutions has commenced and is expected to go live over the next few months.

## LA law firm discovers with contentCrawler

Lee, Hong, Degerman, Kang & Waimey, PC (LHDK&W), has successfully deployed Docscorp contentCrawler to enable full file search and precise legal discovery.

contentCrawler is processing legal documents in both English and Korean, ensuring every saved file can be identified and retrieved when required. contentCrawler converts image-based documents in content repositories and document management systems to text-searchable PDFs.

It can recognize more than 180 languages, and as many as 16 at once without any impact on speed or performance.

Hugo Arriola, IT Manager at LHDK&W, explained that "contentcrawler's ability to recognize and process Asian character sets gives us confidence knowing 100% of our client files can be found via a simple text search."

DocsCorp VP for the Americas, Bob Moore, said, "Multi-language support is just one of contentCrawler's many value-add features. It's must-have software for any law firm with an international or diverse client base."

<https://www.docscorp.com/products/contentcrawler/bulk-image-conversion-software/>

## SA Education adds identity management

Micro Focus has announced its identity management solution has been selected by Insync Solutions as part of the South Australian Department for Education's EdPass project.

As part of the project, Insync Solutions will use Micro Focus's identity management solution to provide automated account creation and a unified access point via usernames and passwords, ensuring users have seamless access to the internet with zero disruption to learning. Users will also have the flexibility to adapt in real time to changing requirements such as moving schools, working between schools, or working remotely.

The Department for Education chose Micro Focus partner, Insync Solutions, to deliver EdPass.

EdPass, which uses Micro Focus technology to manage identity, access, and security, will be used by more than 900 schools and preschools across the state, including 250,000 students and 30,000 staff members.

Scott Bayliss, CIO, Department for Education South Australia, said, "Micro Focus's solution was chosen because it met all of the program requirements at a high standard and supports our vision to simplify the login experience for staff and students.

"By automating identity management, Micro Focus's solution will reduce the number of times that staff and students need to login to access the intranet and applications. It will save time, reduce frustration and let schools and preschools focus on teaching and learning."

The EdPass project is due to be completed by mid 2021. It forms part of an overarching program of ICT foundations work that includes SWiFT fibre to schools and preschools and SWiFT Network Technologies. These projects will leverage EdPass functionality and will deliver on the Department for Education's commitment to connect every government school in South Australia to fast reliable internet, regardless of location.

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**OPEX**  
CORPORATION

# Realize 2020: Award Winning ways with Content Manager

Micro Focus has announced the four winners of its Outstanding Achievement by Content Manager Customer Awards at the annual Realize 2020 Summit, held exclusively online this year.

## Tasmania's Department of Primary Industries, Water and Environment.

Winner of the Outstanding Achievement in Innovation Award was Richard Mitchell, Acting Director (Project Management Office) at Tasmania's Department of Primary Industries, Water and Environment.

Following a series of agency mergers there were multiple eDRMS systems in use across the department and one system was at the end of life. Usage by staff was low and there was a critical need for integrations with key business systems and migration to Microsoft365. Solution provider iCognition provided an upgrade to Content Manager within its EDRMSaaS.Cloud service via a software as a service (SaaS) model, also migrating the department's DocumentOne solution.

The department now has a platform capable of providing compliance and governance over its Microsoft 365 environment via a single EDRMS hosted in the cloud. Content Manager is the eDRMS engine that manages the record-keeping requirements while most staff interact with via iCognition user interfaces: RM Workspace, RM Workflow and Office365Bot.

## George's River Council

Marisa Severino, George's River Council Team Leader Information Management, received the Award for Outstanding Achievement in Customer Experience. Georges River Council is a Council of the former Hurstville and Kogarah Councils that amalgamated in 2016. Council has just over 500 users in Content Manager 9.2 after an upgrade from TRIM 7.3.

"Content Manager comes with a different licensing model and also different security access controls to that of TRIM 7. The testing team spent a lot of time understanding the different levels and comparing the access the staff required for each position.

The research and preparation paid off. The levels were applied and everything went smoothly," said Severino.

Implementing an upgrade or new software, Severino recommends:

- Mapping out and following a process
- Involving essential parties with timed actions
- Establish a contact with the supplier
- Be prepared!
- Most importantly, engage and train the users to gain the most benefit from the upgrade
- Celebrate your achievement
- Review and Evaluate

## NSW Office of Sport

Gerard Calilhanna, Records Manager, NSW Office of Sport, was awarded Outstanding Achievement in Cloud Innovation. Headquartered at Sydney Olympic Park, the Office of Sport has offices, venues and sport and

recreation centres spread across NSW and belongs to the Stronger Communities Cluster.

An external audit in 2017 found large areas of non-compliance with record-keeping requirements and obligations, persisting over time that needed fixing.

Solution provider Kapish was engaged to assist with the following:

- Implement a consolidated standard Electronic Documents and Records Management System (EDRMS)
- Create a new Business Classification Scheme (BCS) to cover the work of the Cluster
- Consolidate multiple datasets into the new dataset Sydney Olympic Park Authority (SOPA), including SOCOG (Sydney Organising Committee for the Games of the XXVII Olympiad), as well as for the OOS, Venues NSWIS (NSW Institute of Sport)
- Provide Record Type consolidation – key record types are shared across different organisations
- Deliver an intense training schedule provided from late October to Go live in early December 2018

"The project was delivered on time and on budget and now provides a single approved Records Management Policy across the Cluster and a single Records Management team," said Calilhanna.

"We have moved to electronic records management and all components of the project came together to allow business to continue to operate during COVID 19.

## University of Sydney

Winner of the Award for Outstanding Achievement in Integration in 2020 was May Robertson, Records Manager at the University of Sydney.

Robertson leads a team of 11 FTE staff in Records Management Services, a division of the University's legal and compliance portfolio. Australia's first University when it was founded in 1852, the University of Sydney now has over 70,000 students enrolled each year and taught by more than 8000 staff.

Micro Focus Content Manager 9.1 is underpinning a burgeoning deployment of automated information capture and digital workflows across the University campus (See full Case Study HERE.)

An important part of the workflow journey has been achieved through deployment of INFORMOTION's Fusion integration engine for Content Manager. INFORMOTION is an Australian solutions provider.

"Fusion encapsulates Content Manager's API coding which then allows business systems to interface with Content Manager without the need to understand its code base or communication rules," said Robertson.

"It eliminates the need to manage custom code every time a business application or Content Manager itself is upgraded as well as providing one place for rules for access control, retention and naming conventions. Fusion underpins the automation of record capture and management."

Underpinned by INFORMOTION's Fusion, there are now many Content Manager-based workflows supporting the University.

# Survey reveals financial services staff most likely to play by the rules – unlike government workers

Staff in the banking and financial services (FS) industry are three times more likely to follow processes "rigorously" than *government workers*, according to new research surveying senior decision-makers by Digital Intelligence company ABBYY. In fact, almost half (46%) of banking and FS workers rigorously follow the rules, compared to just 15% in government.

Staff not following processes claim processes are too complex or there are too many to follow. Encouragingly, leaders are open to a helping hand with an enormous 98% in banking and FS think process mining technologies would be helpful to their business, as did 89% in insurance.

"In a rapidly shifting industry like financial services – where incumbent institutions have struggle to keep pace with emerging, innovative challenger brands – figuring out which processes work best and which don't, and which are too complex or hard to understand, is a game-changer," said Bruce Orcutt, SVP of Product Marketing at ABBYY.

"Only then can the best processes be automated, freeing up staff to take on more strategic, human-centric work."

Fortunately, FS leaders believe their staff are well-motivated to follow processes and rules. Only 12% of staff don't have the motivation in banking and FS, and as few as 8% in insurance. Overall, approximately 9 in 10 bosses (89%) in both banking, FS and insurance said processes are "rigorously" or "mostly" followed.

Conversely, a quarter (25%) of government leaders say their employees aren't motivated to follow the rules – and

an even greater proportion (31%) think they don't have the time. In times of crisis, processes and procedures are even more critical to getting work done. This casts a worrying light on the actions of government workers during the current pandemic.

When financial services employees do break the rules, it's often to provide better customer service – 62% of insurance leaders have confidence that their employees do so to meet the needs of customers, and 50% of banking and FS bosses agree. This suggests financial services staff are extremely customer-driven, and willing to bend the rules when it's better for customers.

Orcutt continued, "The survey suggests the importance of gaining visibility to business processes as they actually behave, identify variances and identifying how they can better meet current customer needs is an essential first step in achieving digital transformation.

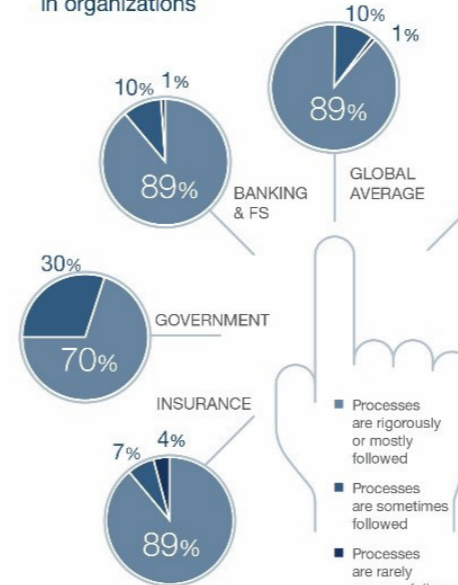
"This is especially critical for financial services companies facing unprecedented pressure due to a perfect storm of maintaining business continuity during a pandemic, technological disruption and evolving customer expectations that impacted call centre operations. This can be achieved using innovative Process Intelligence solutions."

For information on how financial services organizations can navigate their processes and content, visit [Digital Intelligence for Financial Services](#) and the blog post [ABBYY helps bank overcome process challenges](#).

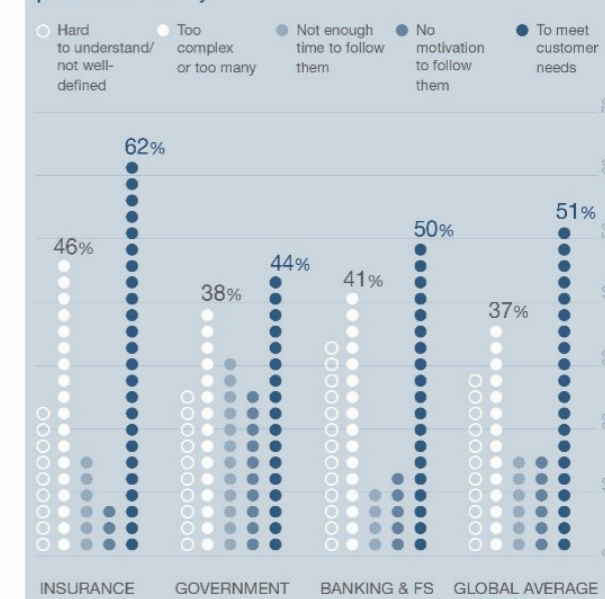
The global survey was sponsored by ABBYY and executed by Opinium Research in March 2020 with organizations across banks, financial services and government

## PROCESS MINING

How well business processes are followed in organizations



Top reasons why employees don't always follow processes strictly



In sight of the fact that processes are not always followed rigorously due to various reasons



98% of decision makers in banking and FS state that process mining technologies are helpful to their business.

89% of decision makers in insurance state that process mining technologies are helpful to their business.

## METHODOLOGY

The global survey was sponsored by ABBYY and executed by Opinium Research in March 2020 with 400 senior directors, MDs, owners and C-Levels with decision making capabilities within their organisation across 6 industries including banks, financial services and government.

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

# NDIS delays caused by records/email management practices: Ombudsman

**A Commonwealth Ombudsman's inquiry into Australia's National Disability Insurance Agency (NDIA), triggered by a surge in complaints over the time taken to process requests for assistive technology by the disabled, has zeroed in on records and email management practices as a source of delay.**

The independent statutory agency is responsible for implementing the National Disability Insurance Scheme (NDIS).

The Ombudsman has recommended the NDIA implement a single national records management system "that allows staff to store, manage and retrieve all information relating to individual participants."

It has also recommended the NDIA close and consolidate its regional email inboxes into a central inbox.

In 2018-19, complaints about assistive technology constituted 13 per cent of NDIA complaints to the Ombudsman, compared to five per cent in the previous financial year.

The most common issue in these complaints is the time taken to process requests. Participants and



their representatives also expressed confusion about the process, and frustration at the lack of clear communication from the NDIA about expected decision timeframes.

The Ombudsman inquiry uncovered instances where requests for assistive technology had not been progressed due to the responsible NDIA staff member being on leave or having left the team or agency, without their work being reallocated.

To correct this, the Ombudsman recommended the NDIA include a workload management function in its new records management system and a implement

a workload management process to "proactively reallocate or reassign work in real time, depending on the availability and caseloads of staff." The Ombudsman also criticised knowledge management at the NDIA.

"During the investigation, we considered the existing and draft staff guidance material relating to assistive technology. This included standard operating procedures for different aspects of the amended assessment process, and an assistive technology task card and practice guide.

"We found the overall guidance for staff to be lengthy and difficult to navigate, with multiple documents involved, often directing staff to read and consider other material.

"From complaints, we have noted instances where the NDIA has acknowledged that staff have not followed existing policies or procedures. During our fieldwork, in October 2019, staff told us they searched for and accessed guidance material for their work on the agency's intranet.

"The NDIA told us it is doing work on simplifying staff guidance. While this is positive, staff still need to be supported to easily access guidance while they are in the process of undertaking their work, whether this be for assistive technology or other aspects of the NDIA's work.

"As the NDIA continues to mature into a national organisation, a knowledge management system similar to Services Australia's operational blueprint would support staff in achieving efficiency, consistency and compliance with policies and procedures."

The NDIA anticipates that at full scheme roll out there will be 460,000 participants in the NDIS. As at 31 March 2020, there were 364,879 participants with an approved NDIS plan.

The NDIA advised that 25 per cent of participants had capital assistive technology supports valued at greater than \$A1,500 included in their plans and 77 per cent of participants had consumables (including low cost assistive technology supports) funded.

The NDIA has responded to the Ombudsman's findings by announcing that is embarking on a new Customer Record Management (CRM) system to be built over the next two years which will include centralised records management.

Responding to criticism of its inability to reallocate Assistive Technology (AT) requests when staff were absent or on leave or, the NDIA stated that "the new CRM system will have full workflow management capability and full visibility for the Participant and the Agency with real time status of all AT requests

It is also currently scoping requirements for a new knowledge management system for the housing and publishing of guidance documentation.

All regional email inboxes have been closed and The National Contact Centre is now the central channel for consolidating all incoming communication.

Full report available [HERE](#)

## Digital Summit returns in 2020

The Digital Transformation Agency (DTA) has announced the launch of the Digital Summit and Australian Government Digital Awards for 2020.

The Summit and awards will bring together digital leaders and practitioners to see first-hand the innovative work taking place across government and industry in the digital space.

The Digital Summit 2020 will be held virtually across four days from 10-19 November, with award announcements each day.

The awards will recognise and celebrate the best examples of digital practice across government and industry. Nominations for the awards are [now open](#).

Nominations for the awards are currently open for nine categories including:

- Outstanding digital product or service,
- Outstanding government platform,
- Outstanding use of emerging technology,
- Outstanding digital methodology or approach,
- Excellence in government/industry partnership,
- Excellence in multi-agency partnership,
- Emerging digital talent (individual with less than 5 years in digital role),

■ Digital professional (individual with more than 5 years in digital role),

■ Digital Diversity (for individual, organisation, product or service that promotes diversity in government digital transformation).

The Hon Stuart Robert MP, Minister for Government Services and the National Disability Insurance Scheme, will deliver the opening keynote address at the 2020 Digital Summit.

'2020 has been a challenging year, but it has driven many of us to think and work differently. As with many industries and programs, COVID-19 has led to an acceleration of our digital transformation journey.

"The Digital Summit 2020 will bring together government and industry to share insights and experiences while engaging with new and existing networks," DTA CEO Randall Brugeaud said.

The DTA is currently calling for [speakers, case-studies, exhibitors and sponsors](#) that will assist summit attendees to adapt, engage and deliver digital transformation for government.

Registrations for the Digital Summit 2020 will open in September.

[Subscribe](#) to register your interest and stay up-to-date with the latest information.



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# Australian California Privacy Challenge

**With over 15,000 Californian residents employed by Australian companies that span more than 83 different industries, including wine production, manufacturing and investment, a new privacy law means Australian organisations must ensure more privacy regulations and compliance are adhered to off the back of GDPR.**

The California Consumer Protection Act (CCPA), which went into effect on 1 January 2020, but is now being enforced globally is the first law of its kind in the US, but may also set the precedent for privacy legislation in other states. Though the CCPA focuses on the data of California consumers, this legislation has international scope as organisations anywhere in the world may need to be compliant with it.

“The expansive reach of the CCPA and scope of data it covers can make compliance feel daunting to many,” says David Bowden, vice president, information security, data privacy, compliance and information technology at Zwift, and member of the ISACA Privacy Advisory Group.

“Having a comprehensive audit program is an incredibly valuable tool for guiding through these intricacies, avoiding repercussions and assuring compliance.”

To assist companies navigate this complex privacy landscape, ISACA has launched a new [CCPA Audit Program](#) and a free white paper entitled [Privacy: Beyond Compliance](#) to equip audit and privacy professionals with the tools to comply with this regulation, as well as understand philosophies and approaches related to privacy.

It will assist auditors to:

- 1) evaluate the design and operating effectiveness of the organisation’s practices and ongoing management of CCPA compliance
- 2) identify control weaknesses

The audit program also includes sections on data security and managing security incidents and data breaches. By following the detailed testing steps outlined in the accompanying program spreadsheet, auditors can help organisations mitigate business impacts through three key elements:

- Strong data classification supporting identification and location of consumer data
- Consistent private data methodology ensuring that third-party vendor handling of private data mirrors that of the entity
- Agile project management and solid change management programs

To provide additional context, ISACA has also published [Privacy: Beyond Compliance](#), a white paper that explores the current state of privacy as it relates to compliance, ethics and humanity. Delving into a range of considerations, including COVID-19 contact tracing and how enterprises can stay accountable for temporary privacy violations during a crisis, the publication also outlines eight key focus areas for boards of directors around privacy—including surveillance and tracking, privacy by design, and looking at data as a reflection of a person’s life.

“Beyond complying with privacy regulations, today’s  
**14 | information & data manager**

privacy professionals should recognise the human impact of poor privacy practice, and augment their privacy strategies in response to a rapidly evolving global digital landscape,” says Guy Pearce, lead developer for the white paper, and chief digital officer, Convergence.tech.

“This foundation equips organisations to perform their fiduciary duties to their customers, clients or citizens more ethically and more sustainably, benefiting not only those the organisation serves, but also differentiating the organisation as one that can be trusted because of what it does, not only because of what it says it does.”

## Kodak Alaris announces Global RPA Alliance

Kodak Alaris has announced a global alliance with Robotic Process Automation (RPA) vendor UiPath. They also introduced the Alaris Capture Pro to UiPath Orchestrator Connector, which provides a seamless connection between fully indexed, high quality images from Kodak scanners and UiPath bots.

“We are delighted to announce this global alliance with UiPath, whose software is among the leading tools for building RPA robots,” said Vanilda Grando, Director Global Sales Development, Alaris.

“Intelligent information capture combined with RPA is especially powerful for finance, IT and IT services, operations and information governance. The combination of Kodak Alaris scanners, software and services, with UiPath’s RPA platform will enable partners to take their customers’ information capture to the next level, making total automation and paper-free processes a business reality.”

Once information is captured via the scanner, software robots complete repetitive, rules-based tasks such as moving files and folders, extracting structured data from documents and executing processes with it.

## Messagepoint Expands into APAC Region

Messagepoint is expanding its global presence into the Asia-Pacific (APAC) region with the establishment of a partnership with Customer Centrics International, an Australian consultancy that helps organizations deliver simplified, personalized, digitized customer communications.

Messagepoint’s AI-powered products include Rationalizer, a solution for optimizing content and migrating it to new systems, and Messagepoint, a customer communications management (CCM) platform that enables intelligent business user content authoring, optimization and management to streamline business processes around these complex communications.

Customer Centrics will leverage Messagepoint solutions as critical enablers of CCM modernization, content optimization and ongoing intelligent content management for complex customer communications.

“The adoption of modern customer communications management systems is critical to turning up the dial on the customer experience, but the process of migrating legacy content represents a significant barrier, often requiring thousands of hours of manual work to accomplish,” said Sean Sim, managing director, Customer Centrics.

<https://www.messagepoint.com>  
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# Industry Profile: Outback Imaging CEO and founder Mike Kirkby

**From a home garage to a brand new owner occupied office building and warehouse in Morningside, Brisbane, Outback Imaging CEO and founder Mike Kirkby has seen it all on his journey to become one of Australia's leading capture software solutions companies.**

It all started in 2002, after Mike was offered the opportunity to acquire software that he had been involved in developing. Confident in where he could take the product, together with 17 years of experience with Australian systems integrators, specifically with some of the leading EDRMS platforms of the day, Mike understood the challenges faced by information and records managers.

It was with this understanding Mike applied both his development skill and market understanding to launch EzeScan as a fast and cost-effective document batch scanning and data capture software solution.

Outback Imaging now has over 30 employees spanning across Australia, United Kingdom and the United States and since 2002 has sold over \$A150M of EzeScan software globally. However, this success has not been without its hurdles.

"Even with a great product to sell, to be honest in the first year of running the company I almost went broke. The reality is when you start up a new business you don't necessarily know everything about being in business and the one thing I was lacking was sales experience," said Mike.

That experience was quickly earned with the first sale of EzeScan to a client in the commercial space, which was ironic as Mike had initially planned to target the local government market.

"It was a great moment when sales started happening, however my first year in business was a difficult one and whilst it could have been easy to walk away, I knew deep down EzeScan had value and more importantly could make a difference to businesses and the people who worked in them. This is why I called the product EzeScan, it was designed to make a hard job easy," said Mike.

"I think it is important to share that it wasn't always success after success. One of the key aspects is recognising what you aren't good at and finding people who are. That is something that even today I really pride myself on, is employing the right people. In doing this the company has gone from strength to strength and I am really proud to lead the team we have now."

## Self funded business

"Another aspect that I am very proud of is that we have grown the business without any external funding. If you chose to bootstrap, you are the master of your own destiny. Self-funding also set the tone for how the business operates. It has always been about the customer and their needs, not trying to appease board members or shareholders. In this way we have always been able to remain agile and responsive to the changing needs of our customers," said Mike.

The future looks bright from the company's new Brisbane headquarters, which has provided a 50% increase in space, providing room for extra staff to



**Founder and CEO Mike Kirkby proudly out front of the company's newly constructed headquarters in Morningside, Brisbane.**

help grow the business to the next level.

"With the release of EzeScan 5.0, we are giving our existing customers on EzeScan 4.3 a superior capture experience with new features and enhancements including a more seamless connection between our desktop and cloud-based capture solutions. Much of this is contributed to the product moving to .net with 64-bit support," said Mike.

"Our current development plans include enhancing how our software is deployed and runs in the cloud. In particular, our new cloud-based invoice processing offering using Amazon Cloud."

## Document-centric future

While the document management market has evolved substantially since the launch of EzeScan in 2002, Mike still sees a huge potential for growth over the next decade.

While the growth of online forms and e-invoicing have the potential to eliminate its use, the "document", whether paper or electronic, is still the required trigger for most business and government workflows.

"Most organisations are still document-centric in that respect, and I think this will remain that way for some time to come," he said.

The company has established long term partnerships with leading enterprise software vendors and consequently EzeScan is now integrated with many popular line of business systems used commercially and in government.

In the EDRMS field, EzeScan was initially focused on the Tier 1 enterprise products but has now broadened to support cloud platforms such as Box, Dropbox, OneDrive, M-Files and SharePoint Online.

"The heavy lifting for most government departments from a records perspective is still done by the Tier 1 and Tier 2 ECM products, but it's important that we have offerings in the commercial space," said Mike.

"The challenge is the same whatever platform you are using. Both businesses and government rely on their staff to name their documents in such a way, that you can find it when you are looking for it. There is a lot of discussion around auto-classification but the challenge here is that even if they are getting it right 99% of the time, you end up with some records that are misfiled. At some point this could become an issue for you as the business is exposed to risk of either not finding document when needed or the wrong people being able access documents.

"A key driver to not removing responsibility is providing the right tools and processes to get the job done correctly, which is what EzeScan can do," said Mike.

"We want to make our customers lives easier, to assist both commercial organisations and government departments to align the capture of their business critical information with the business processes themselves."

Outback Imaging is assisting its customers to operate in the drastically altered landscape caused by COVID-19.

"We've been reallocating our customer's EzeScan licenses so that they can be used from their home offices, deploying rental scanners and software so the business



**The EzeScan development team is 100% Australian-based.**

can continue operations even though their team are in various locations," said Kirkby. "By focussing on our customer's needs we have been able to keep our own team fully employed without requiring Job Keeper assistance or having to resort to downsizing our workforce like many companies have had to unfortunately experience."

Mike believes a large portion of IT-based roles will remain 'home office based' after the COVID-19 pandemic is brought under control.

"It's going to accelerate the move to the cloud and to SaaS delivered solutions. This is a deciding factor in where we are investing our R&D funding and helping us to determine what our product suite will look like. Ultimately EzeScan's goal is to deliver solutions that provide our customers the outcomes and operational benefits that their organisations require now and into the future."

<https://www.ezescan.com.au>



"Our employees are the lifeblood of the company, many of them have committed a large portion of their working lives to the company and serving our clients. We are truly grateful for this," - Mike Kirkby

# Meeting Victoria's COVID 19 challenge to Council Planning workflow

Victorian legislation introduced to deal with the COVID 19 provided a challenge to Local Government Authorities in that state that still had many human touch points in their planning workflows.

Reducing the opportunities for virus transmission required eliminating these touchpoints, a strategy that Melbourne's Bayside City Council achieved with the assistance of an EzeScan scan management solution.

Bayside's traditional planning workflow required that plans and objections be submitted either via hard copy delivered by mail or direct to council offices or email, then registered in Content Manager and a copy provided to the Victorian Civil and Administrative Tribunal (VCAT).

Traditionally residents that wished to view objections to planning proposals would visit Council Office to do so.

The Victorian government's Omnibus (Emergency Measures) Bill 2020 passed in April 2020 introduced COVID 19 temporary measures that included requirements to make planning documents available for inspection on Council's Web site.

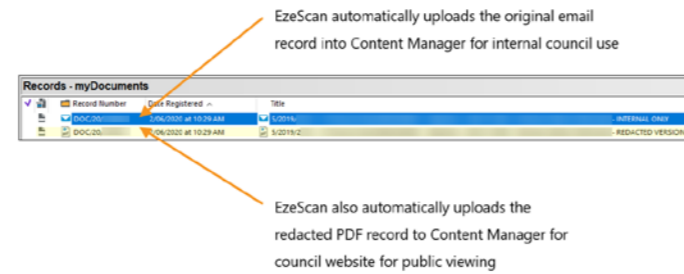
Alistair Bourrilhon, Corporate Records Coordinator at Bayside City Council, said "When the legislation passed, we had to find a sure way that we could do this without compromising the integrity of the planning submissions process.

"With safe distancing and self-isolation, we could not allow our residents to come in. We also had to make sure the details of the objector was not visible to the person building a fence or a new pool.

"The integrity of the data was at the forefront of all of this as well as having to make sure that we were obeying government legislation, requiring us to be as agile as possible.

"We have been using EzeScan for over 10 years to classify, scan and register information that arrives by post and via email from Council's Web site, so we contacted them for a solution," said Bourrilhon.

EzeScan implemented the solution through a Web form



on Council's Web site that generates an email which is automatically categorised using the INDEX module in EzeScan.

Two PDFs are then automatically generated, a raw original and another with all personal data automatically redacted. Both the original and redacted document are saved into Council's Content Manager-CM9 record-keeping system and delivered to VCAT when required.

The redacted copy is then published to Council's website to allow public inspection, as required by the new government legislation.

"EzeScan was able to make sure that we got everything up there without any issues whatsoever so we now have a record of the original objection which has not been tampered with as well as the redacted version as required by the COVID legislation," said Bourrilhon.

"The Web form has mandatory fields for submission details such as name, address and application number. Choosing which fields to redact in the published PDF is just a simple matter of selecting an item in the dropdown menu in EzeScan

"It then literally wraps all the security from the content management system into the redacted format."

EzeScan can be used as a data capture or data entry application. Data can be typed, derived from recognition engines, or looked up from other systems or SQL compliant databases.

<https://ezescan.com.au/products/ezescan-modules/index-module>

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# Army Records go Digital



**A \$A3 million tender win for Australia's DatacomIT in August is the first step in a five-year program by the Department of Defence to backscan and digitise a massive paper archive of Army Personnel records held at Victoria Barracks Melbourne.**

Until it began creating digital records in 2015, management of personal files in the Australian Army involved a lot of paperwork. Just how much is underlined by the 14 kilometres of shelving at Victoria Barracks containing around 100 million individual documents holding the records of those who served from 1947 through to 2015.

From the Korean War, Vietnam, the Gulf War and Afghanistan, these records include all documents relating to a member's routine administration, career management and training.

A spokesperson for the Department of Defence said, "To increase the capacity and capability of Defence to deliver services, DatacomIT will be digitising 2.5 km of these records initially, with the remaining records planned for digitising over the next 5 years via a mix of in-house and contracted models. Records have been prioritised to ensure those most in demand will be available first."

The documents will be scanned and OCR'd as text searchable PDFs for storage in the Defence

*An Australian Army soldier from Special Operations Task Group directs US Army Black Hawk helicopters to a landing zone at Gizab, Uruzgan province, southern Afghanistan, in April 2010. His personnel file along with all those who served post-WWII will undergo digitisation.*

Department's Objective EDRMS. The process will comply with National Archives of Australia Digitisation standards for Paper products. Non-compressed archival master files in TIFF are also being generated for the National Archives.

"This will allow Defence to provide the records to Defence business units, ex-serving members and/or their representatives, and other agencies such as the Department of Veterans' Affairs in accordance with the Privacy Act 1988 and Freedom of Information Act 1982.

"Completion of the process will also free up a significant office accommodation, provide cost savings across the reduction of storage, management and access costs, as well as ensure integrity of the records once digitised as physical files are difficult to store and fraught with risk from deterioration, loss, water and fire," said the Defence spokesperson.

This risk is illustrated by the cautionary tale of the massive [US National Personnel Records Center fire](#) in 1973 at the Military Personnel Records Center in Overland, Missouri, a suburb of St. Louis, where up to 18 million US military records were engulfed in flames.

That fire was responsible for destroying 80 percent of US Army personnel records for soldiers discharged between 1 Nov 1912 to 1 Jan 1960 and 75 percent of the Air Force records of Airmen discharged between 25 Sep 1947 to 1 Jan 1964.

The effects of that fire are still being felt today as US Veteran's Affairs faces the challenge of assessing healthcare and benefits without any service records.

"DatacomIT has developed a bespoke suite of products and methodologies to effectively and efficiently process and OCR the records," said Eamonn Donohoe, General Manager at DatacomIT.

This will not be an everyday exercise in document scanning. The records are held on old paper, new paper, even some occasional blue paper, thick paper, thin paper, handwritten paper notes and reports, multi-sheet forms, paper typed on ancient typewriters, paper printed out by the earliest generation of dot-matrix mainframe computer printers and by networked laser printers. Paper fed into typewriters or single-sheet printers askew, paper with its content faded and almost gone, paper scarred by multiple staple holes, dog ears and paper clip imprints.

To digitise the Australian Army records, DatacomIT will utilise up to five [OPEX Falcon V+](#) scanning devices along with other specialty capture devices. OPEX promotes the Falcon Series as being developed specifically to deal with difficult and unique documents and able to process anything from thick paper to onion skin or fragile or damaged pieces without pre-sorting.

The first 2.5km of records to be scanned by DatacomIT

will generate more than 17 million individual document images.

"Pre 1980 records are deemed RNA (Retain National Archives) so the hard copy file will be archived at National Archives of Australia. Post 1980 physical records can be destroyed once Defence provides approval to destroy," said Donohoe.

"DatacomIT has a strong understanding of the tasks, challenges and expert capability required to complete this Defence Archives digitisation project. The majority of staff to be deployed on this project are highly trained, experienced and possess Australian Government Security Vetting Agency (AGSVA) clearances.

"The DatacomIT Digitisation Facility at 1 Albert Rd, Melbourne (Corner of St Kilda Road) is a highly secure facility and for this project we have allocated space for Defence quality checking staff to operate from within our facility," he said.

While the Army tackles its post-war paper archive, the National Archives of Australia (NAA) has begun a \$10 million program to digitise the bulk of WWII service records for the Army, Navy and Airforce that have never been scanned.

There are over one million WWII service records however only 209,406 (20%) of these records have been digitised. The Morrison Government made an election commitment to digitise the remainder, which has been enabled by allocating \$A10 million over four years to the NAA.

The location of records held by Defence Archives is available at [www.defence.gov.au/records](http://www.defence.gov.au/records)

## Securing the Past for the Future through Digitisation



DatacomIT is a 100% Australian owned company and is a recognised leader in digitisation of preservation material for cultural institutions. Utilising proven leading-edge technologies, we have a clear determination to deliver the most efficient and effective solution available. The DatacomIT team has established long-standing credibility within the archives and digitisation industry, offering expertise and professionalism to our clients.

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# Achieving Supply Chain Resilience with Process Intelligence

By Andrew Pery

**We are all familiar with the proverb “necessity is the mother of invention.” In an interdependent global economic environment, anticipating unexpected risks is built into the DNA of every organization, large and small.**

But nothing could have prepared us for the pervasive impact of this pandemic. According to a [survey](#) by the Institute of Supply Management, 75% of companies are reporting significant supply chain disruptions, which is unprecedented in modern times.

Just in time inventory and dependence on lowest cost suppliers, the hallmark of modern supply chain management, now represents risks to businesses.

The pandemic is necessitating a fundamental [re-architecting](#) of supply chains:

“How should we retool our supply chain to protect against shocks while staying competitive on cost and value? For years, ‘faster, cheaper and more efficient’ has been the supply chain manager’s mantra.

Quick delivery, lean operations, and a widely distributed footprint have been the top priorities. But in a matter of a few short weeks, the global coronavirus panic demonstrated starkly that many management teams have vastly underestimated the value of supply chain resiliency and visibility.”

Achieving supply chain resilience requires consideration of a number of strategic initiatives:

- Mitigating supply chain risks by developing alternative sources of supply and ensuring minimum inventory levels in the event of unforeseen shocks and disruptions, even if it means higher inventory holding costs;

- Shifting the sourcing of components and manufacturing of products essential for business continuity to minimize geo-political risks and shocks to the supply chain. This may necessitate re-thinking the merits of a more localized supply chain, which may result in higher operating costs, but which guards against critical inputs to manufacturing processes;

- Increased investments in supply chain process optimization in order to gain better visibility to end-

to-end supply chain processes, how they perform, where process bottlenecks may exist, their degree of variability, and enabling organizations to make informed decisions to remediate supply chain process efficiencies based on observed facts; and

- Automating highly labour-intensive and inefficient document-centric processes associated with the flow of goods. Transportation constitutes as much as 50% of logistics spending. A significant component relates to documentation processes that span certificates of origin, certificate of insurance, packing lists, dangerous goods forms, bills of lading, and customs clearing documentation. Inefficiencies and errors associated with documentation can be time consuming, labour-intensive, and costly. Demurrage charges may be incurred when shipments are not taken delivery of due to inaccurate or incomplete documentation.

Addressing these strategic imperatives requires a holistic approach to achieving a resilient supply chain.

The foundation is the creation of [“a digital twin” of the supply chain and investing in control tower solutions for end-to-end visibility across the supply network.”](#)

[ABBY Process Intelligence](#) enables your organization to discover, visualize, and analyse supply chain data from both digital and physical sources.

When properly ingested, merged, and analysed, this wealth of data can be used to discover patterns and insights that illuminate paths for achieving optimum supply chain performance by building a virtual model of your processes that:

- Visualize the flow of your work through supply chain process stages and see the delays, bottlenecks, and outliers:

- Rapidly reveal how every occurrence of every process is executed, including even the most ad-hoc, variable workflows:

- Simply and quickly pinpoint the root cause of non-compliant, unusual, or high-cost supply chain processes:

- Automatically generate a foundation for data-driven decisions with quantifiable process metrics, including cost, duration, and volume:

- Help you understand exactly how your supply chain processes affect compliance and service delivery. You gain full transparency and actionable insight for optimizing processes, making decisions, and improving results:

- Identify and automate manual processes, delivering faster time to value on your process improvement initiatives: and

- Use early stage data to predict process outcomes and proactively plan or act.

A [study](#) by Bain and Company re-enforces the importance of investing in technologies that “empower organizations to proactively anticipate the impacts of disruptions by harnessing machine learning and artificial intelligence for predictive and prescriptive analytics.”

The ability to make proactive decisions is dependent on an understanding of how supply chain processes work by uncovering process execution bottlenecks that drive supply chain inefficiencies.

Recently, ABBYY hosted a [webinar](#) with two information management and supply chain experts who shared their collective experience and best practices relating to achieving supply chain resilience.

Added key takeaways are summarized in [an article published by Deep Analysis](#):

“Leverage business insight from data analysis and process intelligence by using process mining to find insights into newer, better, and faster ways to work in the midst of disruption;”

“Digitize labour-intensive, inefficient, paper-based processes;” and

“Use agile approaches to quickly implement low-code case management (including document management, digital decisioning, and digital process automation).

This can automate to eliminate manual steps, activities, and processes while also eliminating physical documents that clog the system.”

*Andrew Pery is an ABBYY consultant with over 25 years of experience in document process automation with a particular focus on application software and best practices associated with data privacy and AI technologies. He is also a Certified Information Privacy Professional.*



## Schooling a digital generation

Teaching students is an important but tough job, as many people have learned firsthand in the wake of the COVID-19 pandemic. A unique partnership between FileBound Australia and Grace Lutheran Primary School in Brisbane is deeply embedding digital transformation across an ever-expanding set of administrative workflows to enable teachers more time to focus on their first priority, student learning.

FileBound Australia initially worked with Grace Lutheran to create and optimize a document management solution for Invoice Processing but the brief has now expanded to touch on many other operational areas, from Leave Requests to Qualification checks and more.

To get the job done, Grace Lutheran relies on a combination of the FileBound content management

and collaboration platform and PsiCapture Document Capture Software.

Prior to adopting FileBound in 2018, the school relied on manual data entry into the school's TASS financials and payroll/HRM platform along with a large number of Excel spreadsheet-based processes.

The first area to be tackled was Accounts Payable

where now PDF invoices that arrive by email are processed by PsiCapture and checked against a digital balance sheet in FileBound so expenses don't exceed approved Purchase Orders.

If no issues, then payment is preapproved and the invoice is input directly to TASS. If an invoice can't be matched to PO an approval process is initiated.

Grace Lutheran Business Manager Stephen Greener said, "Moving the AP workflow wasn't so much about saving money it was more about compliance around budgets and ensuring the right people were making the right decisions when any exceptions arise."

Once the invoice processing solution had been bedded down, the next area to tackle was a gift register for teachers, a requirement of the Lutheran Church in Australia. This was implemented through a Web-based e-form in FileBound.

Another FileBound workflow has been established to manage Asset Requests, when somebody on staff wants a new laptop or lawnmower, instead of sending an email they fill out a webform when then kicks off a process that integrates with school budgeting and includes attaching supplier quotes for the requested asset.

Since the pandemic hit, upending the traditional school year by sending teachers and students home, Grace Lutheran has worked with FileBound Australia to examine other ways to pivot some of its key systems.

Teachers and other staff need ongoing certification of

qualifications and working with children checks. Having a FileBound workflow manage a register of qualifications and issue reminders of due dates for renewals to staff and supervisors will help avoid any embarrassing lapses.

A similar application will be used to keep track of compliance documentation for school contractors and instead of requiring a staff member to send reminder emails it will generate a prepopulated Webform for them to complete.

Event planning is a big part of every school administration with loads of ancillary paperwork in checking quotes against budgets and approvals, etc.

Other processes in the pipeline to automate in FileBound range from Staff Professional Development requests to Training Management.

"Doing all this in Excel may be digital but the process is not intelligent," said Greener.

"Wherever you need someone to send an email to kick off a process you need a human at the other end to make a decision.

"We are looking to have FileBound get this done automatically as much as possible by having the system conform to a set of rules that has been established by the school."

"We are only a small Primary School but efficiency is even more important with a small team unless you all want to work 60 or 70 hours a week," said Greener.

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## NSW DCS starts out on e-invoicing journey

The New South Wales Department of Customer Service (NSW DCS) has implemented an e-invoicing solution to automate the procure-to-pay process for more than 41,000 invoices processed annually by its shared services centre, although it will continue to allow suppliers to send paper/PDF invoices.

Established on July 1, 2019, NSW DCS comprises more than 30 different agencies, entities and business units of the state government.

EDI specialist MessageXchange was appointed to implement e-invoicing through its Peppol-certified Access Point, which involved creating a dedicated gateway on the MessageXchange cloud service that connects to the SAP enterprise resource planning (ERP) system at NSW DCS.

In this gateway, the workflows and business rules have been applied specifically to NSW DCS's needs, ensuring that invoice data is received correctly the first time. If there are errors, MessageXchange software flags them with both NSW DCS staff and its suppliers immediately.

MessageXchange also established connections to accounting software commonly used in small and medium-sized enterprises (SMEs) so suppliers can send e-invoices.

For NSW DCS, MessageXchange provided integrations to both Xero and MYOB AccountRight Live, which covers a large portion of DCS's supplier base.

The initial pilot was carried out in October 2019 and phase one of the project started in January 2020 and went live in March, with stage two currently underway.

A NSW DCS spokesperson said, "Currently a very small proportion of invoices are flowing through the e-Invoicing channel. Work is currently underway in planning for the Supplier awareness and on-boarding campaign to be launched towards the end of the year.

"We understand that some of the popular accounting software packages are in the process of embedding a PEPPOL Access Point service within their product to offer seamless experience to their clients. A combination of these two initiatives is likely to result in large number of suppliers being able to send e-Invoices thereby increasing the volume of e-Invoices."

e-Invoicing is currently enabled across 26 agencies that are part of the three NSW Government clusters of Department of Customer Service, Department of Premier & Cabinet and Treasury. Work is currently underway to identify additional agencies for e-Invoicing adoption.

PEPPOL compliant e-Invoicing is currently not mandated across NSW Government.

NSW Health has a detailed e-invoicing policy and process that does not require suppliers to connect via a PEPPOL Access Point, although the data exchange (hub) provider for NSW Health is an accredited PEPPOL Access Point.

In order to submit e-Invoices, suppliers need to connect to a PEPPOL Access Point, and are then charged based on the number of transactions per month. Prices vary based on volumes, file formats and connection protocols. A list of accredited Access Points is available at <https://www.ato.gov.au/Business/E-invoicing/Finding-an-E-invoicing-accredited-service-provider/>

John Delaney, managing director, MessageXchange, said, "With an e-invoicing solution from MessageXchange, DCS can pay invoices faster and help its suppliers maintain cashflow. The MessageXchange Access Point processes these e-invoices securely and accurately, reassuring DCS that its data and supplier information is secure.

"E-invoicing makes processing and sending invoices faster, more accurate and less expensive for organisations of all sizes, including government departments and private businesses."

## AI Solutions changing A/NZ Business Models

Over half of Australian and New Zealand enterprises implementing Artificial Intelligence (AI) solutions say the deployments are enabling changes to their business models, according to a new report from analyst firm IDC.

It found conversational AI is transforming the customer care model and predictive analytics is shifting traditional maintenance business models.

A/NZ organisations are using AI Recommendation Systems to optimise transport routes, detect driving offences and determine effective environmental protection actions.

IDC's AI in Australia and NZ: Viable Use Cases Driving Adoption report says that the main drivers behind investment are automation for productivity, customer satisfaction, business agility and accuracy.

"Organisations are shifting workloads to AI solutions where the system can make decisions and act faster than employees can", says Liam Landon, Associate Market Analyst at IDC, "Artificial Intelligence is augmenting the employee workforce, driving changes to business models to capture real returns on improved productivity, satisfaction, agility and accuracy".

A common example frequently deployed in A/NZ is where organisations deploy Conversational AI to provide consistent and accurate responses to straight-forward customer queries.

This frees up frontline staff to spend more time helping customers with complicated queries. More complex uses of AI that leverage large data sources such as assisted diagnoses, especially within healthcare, will grow as the technology matures.

40% of A/NZ organisations said they planned to deploy an AI initiative by the end of 2020. The impacts to business from the COVID-19 crisis has dampened business spending intent for 2020, but still close to one-third of organisations expect their budgets for AI to increase in 2020.

"Organisations are investing in AI solutions to adjust quickly to market changes and enhance the customer experience through improved business processes.

"The additional benefit of business agility gives organisations the ability to be more flexible to changes in the market, unlocking greater potential to stay ahead of competitors. This is especially key, given the recent stress many workplaces have been placed under due to Covid-19."

IT operations and customer service business processes are common uses of AI and will remain frequent, with more simplistic implementations such as chatbots being popular.

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# How the shady world of the data industry strips away our freedoms

By Uri Gal, University of Sydney

The recent questioning of the heads of Amazon, Facebook, Google and Apple in the US Congress has highlighted the [threat](#) their practices pose to our privacy and democracy. However these big four companies are only part of a vast, sophisticated system of mass surveillance.

In this network are thousands of data brokers, ad agencies and technology companies – some of them Australian. They harvest data from [millions of people](#), often without their explicit consent or knowledge.

Currently, this includes data related to the COVID-19 pandemic. For instance, data giant Palantir has provided [lab test results and emergency department statuses](#) to the US Centres for Disease Control and Prevention.

## How much do they know?

Data companies gather data about our online activity, location, [DNA](#), health and even how we [use our mouse](#). They use a range of techniques, such as:

- web-trackers planted on [almost every page on the internet](#), which follow our browsing activity
- “smart” home devices [leaking details of our usage habits and location](#)
- [millions of mobile apps](#) sending our data to unknown third parties, including sensitive information such as [when we last had sex](#)
- [millions of retailers](#) tracking our purchasing habits and [in-store movements](#).

This expansive tracking generates [billions of data points](#) that can reveal every facet of our lives including our family status, income, political affiliation, interests, friendships and sexual orientation. Data companies use this information to compile detailed individual consumer profiles. These are used for purposes such as [targeting us with ads](#), determining our [eligibility for loans](#) and assessing the [riskiness of our lives](#).

## The data industry in Australia

Some of the world's largest data companies operate in Australia. Quantum is an Australian data analytics firm

that acquires data from various partners including NAB, Qantas, Woolworths (which owns 50% of the company) and Foxtel. These partnerships [allow Quantum to](#) “tap into the consumer data ecosystem with an unrivalled picture of the behaviours of more than 80% of Australian households, spanning banking, household and retail transactions”.

A company spokesperson told The Conversation most of its work is “data science and AI (artificial intelligence) work with first-party de-identified data supplied by the client”. From this, Quantum delivers “insights and AI/decision support tools” for clients. Anonymised or “de-identified” data can still be [accurately re-identified](#). Even if a person's details are de-identified by being converted to an alphanumeric code, the conversion method is identical across most companies.

Therefore, each code is unique to an individual and can be used to [identify them within the digital data ecosystem](#)

## A lack of transparency

With a revenue of more than [US\\$110 million](#) last year, the insights from Quantum's data seem to be proving valuable. From this revenue, more than [A\\$61 million between 2012 and 2020](#) came from projects commissioned by the Australian government. This includes two 2020 engagements:

- a “COVID-19 Data Analytics” project worth more than A\$10 million with a contract period from March 17, 2020 to December 31, 2020
- a “Quantum Health Data Analytics” project valued at more than A\$7.4 million with a contract period from July 1, 2020 to June 30, 2021.

Quantum's spokesperson said they could not discuss the details of the contracts without government approval. In the past decade, the Australian government has commissioned dozens of projects to other data analytics firms worth more than A\$200 million.

These include a A\$13.8 million Debt Recovery Service project with [Dun & Bradstreet](#) and a A\$3.3 million National Police Checks project with [Equifax](#) – both started in 2016. It's unclear what and how much data has been shared for these projects.

Last year, Quantum was one of several larger companies [put on notice by Australia's consumer watchdog](#) for sharing data with third parties without consumers' knowledge or consent.

## How do they work?

Data companies largely operate in the shadows. We rarely know who has collected information about us, how they use it, who they give it to, whether it's correct, or how much money is being made from it.

LiveRamp (formerly Acxiom) is a US-based company partnered with Australia's Nine Entertainment Co. [This partnership](#) allows the Nine Network to give marketers access to online and offline data to target consumers across Nine's digital network. This data may include the Australian electoral roll, to which LiveRamp [gained access last year](#).

Similarly, Optum is a US-based health data company that [collects information](#) from hospital records, electronic health records and insurance claims.

It has data on [more than 216 million people](#) and used this to develop a predictive algorithm that was shown to [discriminate against black patients](#).

## Compromising our democracy

The prevalence, scope and stealth of the abovementioned data practices are not congruent with the basic principles of a liberal democracy.

According to philosopher Isaiah Berlin, liberal democracies can only thrive if they have autonomous citizens with [two types of freedoms](#):

- freedom to freely speak, choose and protest
- freedom from undue inspection and intervention.

Our data-driven world signals an extreme diminishing of both these freedoms. Our freedom of choice is harmed when our informational environments are doctored to nudge us towards [behaviours that benefit other parties](#).

Our private space is all but gone in a digital environment where everything we do is recorded, processed and used by commercial and governmental entities.

## How can we protect ourselves?

Although our ability to disconnect from the digital world and control our data is [eroding rapidly](#), there are still [steps we can take](#) to protect our privacy.

We should focus on implementing legislation to protect our civil liberties. The Australian [Consumer Data Right](#) and [Privacy Act](#) stop short of ensuring the appropriate data protections. The Australian Competition and Consumer Commission highlighted this in its [2019 report](#).

In 2014, the US Federal Trade Commission [recommended](#) legislation to allow consumers to identify which brokers have data about them – and that they be able to access it.

It also recommended:

- brokers be required to reveal their data sources
- retailers disclose to consumers that they share their data with brokers
- consumers be allowed to opt out.

If we care about our freedoms, we should try to ensure similar legislation is introduced in Australia.

[Uri Gal](#), Associate Professor in Business Information Systems, University of Sydney. This article is republished from [The Conversation](#) under a Creative Commons license. Read the [original article](#).

## Organisations playing catch-up with security and ethics

Digital transformation technologies are increasingly becoming a necessity for businesses in 2020 and beyond. With the demand for data increasing, maintaining privacy in today's fully connected world can be a challenge for many businesses.

According to PwC, only 25 per cent of consumers believe that companies manage their sensitive personal data responsibly. This means companies must not only protect their customers' privacy but also make their protection measures transparent and clear so that customers can develop confidence in the organisation, according to Micro Focus.

George Atrash, head of enterprise security – Australia and New Zealand, Micro Focus, said, “For many years, society was blinded by the possibilities of Web 2.0, smartphones, GPS satnav and instant updates from friends. Privacy was never a top concern, with people happily authorising companies to collect personal, sensitive data, in exchange for free services or a more personalised experience.”

Since then, societal attitudes have shifted, particularly with the rise of artificial intelligence (AI), and its subset, machine learning (ML). There is now an increased scrutiny on privacy and data collection, with data security and transparency now expected from companies using people's personal data for corporate gains.

The Australian Privacy Act requires companies to protect personal and sensitive data, and there are significant penalties in place for failing to do so. Regulations such as the Notifiable Data Breach Scheme implemented in Australia in February 2018 requires organisations to report ‘eligible data breaches’ to the Office of the Australian Information Commissioner (OAIC) and the affected individuals with heavy penalties imposed on organisations.

Some Australian companies may also be affected by Europe's General Data Protection Regulation (GDPR), which applies to all organisations transacting with European-based organisations or citizens. In 2018, the GDPR was updated to require websites to notify visitors of privacy measures and ask for permission to collect personal data.

Micro Focus has identified three key changes privacy legislation has made to data collection:

- Increased disclosure - Since privacy legislation was introduced, there has been more transparency about exactly what private data a business collects and why. Privacy policies are easier to understand as well as more comprehensive.
- Multi-factor authentication - Another visible adjustment is the widespread use of multi-factor authentication.

■ More businesses now operate on otherwise-meaningless cipher substitutes in place of sensitive data such as customer account numbers, birthdates, email or street addresses, and so on.



# The Digital Mailroom Made Easy

By Jessica Rivers, PSIGEN Software, Inc.

There you are again. Another day under those florescent lights in the basement room of some office building. The sound of the franking machine pushing letter after letter through. There are buckets of mail piled high against every wall.

The bustle of your fellow co-workers as they prepare their stations with rubber thumbs and that pink grease for your fingers. Looking around, you find yourself longing for that workday to be done. Unfortunately, you know it'll be a late night.

That morning mail drop-off all but assured you that you'll miss that evening walk at right about dusk—that perfect moment when the sky is full of pinks, purples, oranges, and blues. It's the fall so the temperature will be perfect. The changing leaves will look gorgeous against that dusk sky.

Or maybe you're working from your new home office manually sorting through mail hoping your five-year-old won't get their chocolate fingers on it. Either way, that walk is sounding pretty good right now, isn't it?

There has to be a solution that could make processing all that mail just a little easier and faster, something to reduce the paper cuts, aching hands and swollen feet. All this remote work has us thinking about digital processes and other ways we can implement them when we all finally get back into the office.

A digital mailroom could cut processing time or errors in sorting. If you're looking to "go digital" or even just improve on certain processes, here are a couple things we suggest.

## Sorting

How are you getting the mail from the envelope? A lot of mailrooms have sorting machines, but is it working the way you want it to? There's a variety of "wrenches" that could be thrown into the works here including mail getting stuck frequently, mail not getting sorted properly, or the machine is down more often than it's up.

These are just a couple of things to think about when considering the efficiency of your sorting devices and workflows.

Now that we've sorted out that heap of paper, it's time to get that mail out to all those waiting recipients. There are plenty options here, too. People place the mail in mailboxes, deliver by cart, or scan for digital distribution. Considering the increase of remote work as of late, let's discuss that last one and focus on the digital solution options.

## Scanning

Do you have a digital system? Does it get scanned? Will you need capture software? It seems like the more we think about it, the longer the question list gets. Then, you reach out to your friends and colleagues to see what their opinion is, only to get so many answers you could fill an ocean.

The most important thing is, you should always look at the way it works best for the company and the team. With a digital system in place, you're going to want a great capture software.



It seems with everything being so digital nowadays we'd have this document capture thing figured out, that we would have evolved past the point of needing paper at all. Particularly with electronic mail and signatures, there's probably a ton of us out there that need to look pretty hard for a piece of paper in our home.

Mail is an important thing and helps us communicate with each other, so if you're scanning mail, you want your capture software to get it right the first time.

### Accuracy, speed, and intelligence.

You want your capture software smart enough to get it right the first time and route it where it needs to go quickly. There are times when you'll need it to redact something from a document to protect it from prying eyes.

Maybe you need it to read multiple lines of invoices or need your team to review before distribution. These are all things that should be considered when looking for the right capture software. It should be able to do all these things (hint: we do this exact thing over here with [PSIcapture](#) and [PSIcapture Fusion](#)).

With the right scanning devices, workflows, and capture software you could put together the digital mailroom of your dreams. You know the one, right? The one that comes with a fresh, crisp Autumn breeze because that morning drop-off didn't give you a case of The Mondays.

If you're interested in finding out more about our digital mailroom solution using [PSIcapture](#) and [PSIcapture Fusion](#), [let us know](#) and we'll give you a demo.

## DocsCorp adds DocuSign eSignature integration

DocsCorp's PDF editing and bundling application, pdfDocs, now integrates with DocuSign, to include the eSignature solution as part of the DocuSign Agreement Cloud. This is pdfDocs' first integration with a third-party electronic signature provider.

"We're excited to be working closely with DocsCorp to deliver this integration," commented Lisa Munnings, DocuSign AVP Global Partner Ecosystem, Asia Pacific & Japan. "It will benefit any business wanting to provide an efficient and completely electronic signing experience for staff and clients."

pdfDocs users will enjoy integration that supports an entirely electronic signature workflow, eliminating the need for printed documents. It will enhance collaboration for virtual teams and remote workers.

Contracts, approvals, and agreements can be finalized in minutes, rather than days. And users can feel confident knowing signatures collected through the pdfDocs and DocuSign integration are compliant with international regulatory standards for governance and retention.

Using the latest version of pdfDocs, users can open documents from their local network or a document management system and send one or multiple PDFs to DocuSign. pdfDocs already offers several electronic signature workflows, including self-signed certificates. The integration with DocuSign expands this offering,

[www.docscorp.com](http://www.docscorp.com)

## Chrome adds support for Tagged PDF

Google has announced that starting with Chrome 85, the world's leading browser will automatically generate a tagged PDF when you choose the "Save as PDF" option.

Since web browsers took over mainstream PDF viewing several years ago, high-quality support for Tagged PDF in web browsers has always been a key objective for advocates of accessible documents. Google's announcement is proof that not only is the web continuing to move in the direction of accessibility, but web technology companies are recognizing that support for PDF is key to modern web browsing.

PDF Association member CommonLook worked with Google on this development and is quoted in [Google's post](#).

In discussing this work with the PDF Association, CommonLook's Co-CEO and Director of Development Ferras Elrayes, who has participated in the development of PDF/UA since 2004, said:

"CommonLook provided technical and standards-related advice to the Google team working on the project. There are obvious challenges and still more to be done as the quality of the tagging is highly dependent on the underlying HTML. But clearly this is a major step forward and we continue to work with Google to provide guidance as they progressively improve the tagging."

The Chrome team has posted some [quick tips](#) on how to use Chrome from the command-line to transform a document directly into a PDF.

# Driving Digital Transformation in the workplace

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# 2020 SA Records Management Award Winners Announced

**Primary Industries and Regions SA (PIRSA) Digital Workspace Manager Deanna Fleming has been announced as the winner of the 2020 Bernadette Bean SA Records Management Service Excellence Award.**

The award is bestowed in honour of the late [Bernadette Bean](#).

The award judging panel selected Deanna in recognition of "her continuous passion for records management service excellence, and dedication and commitment to the records and information management industry. This includes Deanna's leadership in leveraging PIRSA's best practice records and information management framework and Objective ECM system to:

- drive best practice digital transformation, and innovative process automation and system integration
- promote information governance
- share knowledge, methodologies, experiences and reasoning with her peers in other agencies to further enhance business outcomes for PIRSA and other government agencies across Australia.

Examples of Deanna's significant records and information management contributions and achievements include the design and implementation of agency-wide best practice information governance and digital transformation initiatives to revolutionise the way PIRSA delivers services to its customers and internal users.

This was achieved by harnessing the power of PIRSA's Objective ECM system workflow, Objective Connect and other product functionality to minimise organisational processing response times, facilitate collaboration and information sharing, improve customer service, and promote information governance.

Deanna and her team were able to derive significant business benefits, productivity gains and increased compliance via the digitisation of records; business process re-engineering; and innovative design, programming and implementation of automated process solutions.

Some examples of agency-wide automated business critical processes implemented relate to the management and approval of ministerial and chief executive correspondence, agency and government briefings, parliamentary estimates, grant applications, human resource onboarding and employee contract activities, ECM system administration tasks, and other targeted business activities.

Other innovative initiatives led by Deanna include the development of ECM system integrations with other business applications to improve information governance, productivity and business performance.

Examples include automating the capture and governance of information and conversations created in Objective Connect digital workspaces and Microsoft Teams channels into PIRSA's ECM system.

The ECM vendor, Objective Corporation, subsequently incorporated these solution improvements into

Objective Connect core product functionality, and also released a new [Objective Governance for Microsoft Teams Module](#) which has been adopted by other customer sites within Australia and New Zealand.

The availability of the new solutions became even more pressing when COVID-19 led to the rapid deployment of collaborative platforms, such as Microsoft Teams and Objective Connect, to thousands of team members across government and other organisations to facilitate collaboration and information sharing while working remotely from home or other alternative office locations.

Other PIRSA ECM best practice integration solutions previously developed and implemented by Deanna and her former team members resulted in them winning two national Objective Collaboration and Integration Innovation Awards in 2016 and 2017. These solutions led to significant business efficiencies, and version control and information governance improvements, and were subsequently shared with and adapted by other SA Government customer sites.

Deanna was also selected to recognise her efforts in sharing methodologies, learnings and other knowledge with her peers in other agencies, and contributing to the industry to promote the importance of information governance and best practice.

This includes Deanna's mentoring of team members in other agencies; and her delivery of case studies, articles, ECM system process automation workflow demonstrations and presentations to information management and ICT professionals and executives at various ECM and professional association user group, convention, roadshow, site visits and other events in SA and across Australia.

The 2020 award runner-up is Port Augusta City Council Records Co-ordinator, Melody Poole. The panel awarded a Service Excellence Merit Certificate to Melody based on "her dedication and commitment to best practice records management; and her outstanding achievements in developing, implementing, managing and maintaining a holistic records management framework for the Port Augusta City Council." This encompassed Melody's work on:

- the council's Micro Focus Content Manager (HP RM) EDRMS upgrade projects and digital transformation initiatives. These projects were rolled out across 14 council regional sites which deliver diverse and complex community and remote services
- the council's records management policy, business classification scheme, disposal schedule, digitisation, monitoring and reporting, change management, disposal, storage, disaster recovery, training, succession plan and other programs implemented to encourage EDRMS uptake, compliance and best practice.

The Merit Certificate also recognises "Melody's willingness to mentor and develop her team members, and to share her knowledge and information with other regional councils."

Visit the award website [Current and Past Award Nominations](#) page to learn more about their achievements.

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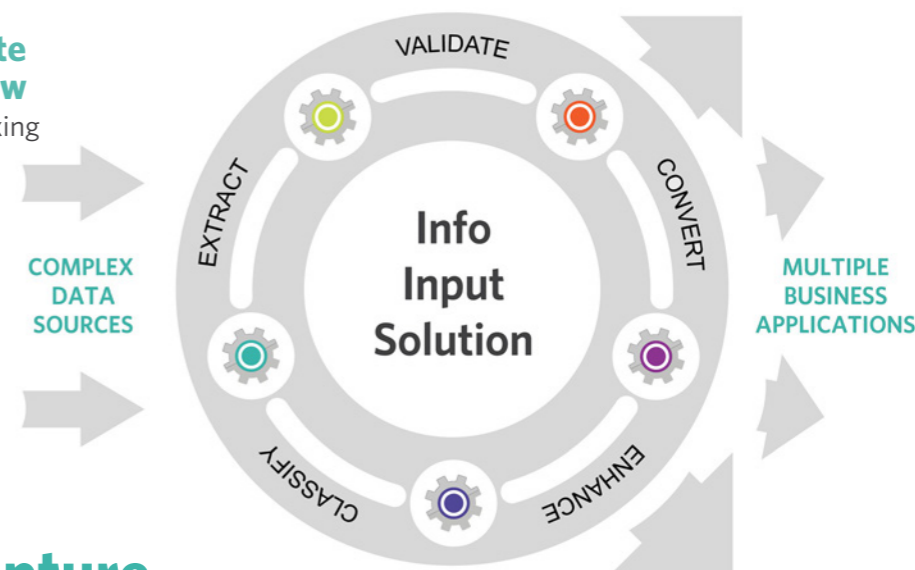
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# 'Miles of Files'

## Robots to Help Manage Billions of Pages at New FBI Central Records Complex



Robots do the heavy lift of organizing FBI files at a new Central Records Complex that will eventually house archived files from all the Bureau's field offices and other storage sites.

**The FBI's robots have arrived in Virginia. And they're ready to be fed. Inside the Bureau's cavernous new Central Records Complex in Winchester, a squad of automated, wheeled robots have dutifully begun the enormous task of filing away millions of paper records from FBI offices around the country.**

The 256,000 square-foot facility, located about 90 minutes from Washington, D.C., will consolidate the storage of truckloads of archived records now housed at each of the FBI's 56 field offices and other sites.

Work on the \$135 million warehouse began in late 2017. The complex opened earlier this year, and in June, staff began loading the first records into custom-designed bins to be shuttled away by robots into darkened, climate-controlled confines for safe keeping and easy retrieval.

The warehouse complex and its state-of-the-art automated storage and retrieval system is one of the biggest in the world, with capacity for more than 360,000 bins, each about the size of a suitcase. The National Archives and Records Administration (NARA) partnered with the FBI on the facility's design and standards.

"The use of innovative technology to consolidate these files in one single location not only represents a huge cost savings but will also help the FBI most effectively carry out its mission," said Arlene Gaylord, assistant director of the Information Management Division (IMD).

Information in case files is frequently sought by agents, investigators, prosecutors, and even members of the public through Freedom of Information and Privacy Acts (FOI/PA) requests. When requests are made, the original files are digitized and sent back. Until now, those file requests would be distributed to individual offices and their staffs. Having everything under one roof—along with a dedicated staff and an army of robots to do their bidding—will ease the burden on field offices and make retrieving files more efficient.

"Having all the case files together and easily accessible is an important step in IMD's quest to become a leader in information management, in order to best serve the FBI and the American people," said Gaylord, who was a linguist for the FBI in San Diego in the 90s and played an early role in the push to digitize FBI records, an effort informally referred to as "miles of files."

The sheer volume of paper records—some going back to the Bureau's earliest days—made wholesale digitization unfeasible, though all requests for files are

made electronically. IMD staff approximate that, all told, there are about 117 linear miles of paper en route to the Central Records Complex, or close to two billion pages. One estimate determined that digitizing everything—at current staffing levels—would take more than 40 years. Just shipping all the paper records to Winchester and then feeding that into bins for the robots to shelve is expected to take two years. Every day, robots deposit about 26 pallets of files—the equivalent of a tractor-trailer—into the storage grid after multiple staff confirm the contents of each file.

The push for better records management began in the early 2000s when the National Archives released new regulations for managing federal records. Congressional funding and authority came later, in 2014, when the Bureau received the go-ahead to partner with the General Services Administration to build a new facility. In preparation for the transition, IMD staff have trained field offices on how to prep all their files before they are boxed, put on pallets, and shipped to Winchester.

"To have the building done and to be able to walk in and work here every day, it's really a thrill," said Teresa Fitzgerald, a former Archives staffer who joined the Bureau in 2003 and has spent the better part of her FBI career preparing for this transition.

Files are packaged in bins and recorded and fed onto conveyors, which lead into a cavernous climate-controlled storage warehouse where more than 360,000 bins can be automatically stacked and re-stacked 16 bins high.

About 500 people staff the new complex. Since robots will handle the heavy lift of depositing and fetching bins of

files, IMD's sentient beings have more time to determine which files should be preserved and which ones should be scheduled for destruction—in accordance with NARA guidelines.

"By taking care of that menial task of storing and retrieving, we can free people up with the expertise to do things like records scheduling and disposition," said James Klipfer, chief of the Bureau's Technology Innovation Section.

And while a few private commerce warehouses have similar automatic-storage systems as part of their distribution systems, Klipfer said he's not aware of any other government facilities like the Central Records Complex.

Here's how they work: bins of products are stacked 16-high in an elaborate steel grid that the robots traverse by following X, Y, and Z coordinates. When summoned, a robot fetches a requested bin and then re-deposits any bins it has displaced in the process, keeping track of their new coordinates. Over time, the most frequently requested records will remain near the top of the grid and other files will sink to lower positions, which creates its own efficiency.

Cases are closed every day, assuring a steady flow of paper that needs to be safely stored or scheduled for destruction. The new complex is designed to meet the need. "It is sized to have the ability to take in new case files as they are closed," Fitzgerald said.

Resources: [Information Management](#)

Videos: [Central Records Complex Opens to House FBI Files](#)



The FBI's new Central Records Complex in Winchester, Virginia, will house more than two billion pages of records when it is fully operational in two years. The 256,000 square-foot facility enlists robots to help manage the files of 56 field offices and other storage sites.

# Safeguarding Teams and Chat

A WA Local Government Authority and an Australian private school with 1200 students have each turned to SafeGuard Cyber to manage security and compliance following a huge surge in Teams and social messaging during the COVID-19 pandemic.

The City of Vincent in inner-city Perth implemented advanced digital risk protection with SafeGuard Cyber, helping adapt to a 24,670% increase in volume of Facebook messages amidst COVID-19.

During the COVID-19 lockdown, local government experienced severe disruptions. Council offices were closed to ensure social distancing, and there was an extraordinary surge in the number of messages directed at its Facebook page, as residents turned to new ways of seeking information and logging requests.

Having received an average of 2.25 messages per month from November 2019 through February 2020, for the period March through May of 2020, the City of Vincent Facebook page received an average of 557.3 messages per month – an increase of 24,670%.

It was important to attend to every message, however, IT teams also needed to ensure that all Facebook interactions were being managed securely and complying with state record-keeping laws.

The team handling Facebook messages had become overwhelmed by the unprecedented scale and velocity of messages. Fulfilling security requirements using previous, manual methods of digital risk protection was simply impossible.

Within official Facebook, Instagram, LinkedIn, and YouTube channels, the council is now able to craft custom policies aimed at capturing potential compliance issues. The SafeGuard platform captures these issues instantly for review.

Through machine learning, compliance issues such as hate speech are automatically flagged for review. The platform's security features also informed city employees compromised email credentials, giving them critical time to reset passwords.

Content passes seamlessly from the SafeGuard platform into the council's existing Micro Focus Content Manager system, via an exclusive integration.

"Social media is critical to engaging with the City of Vincent community. It is important that our social media interactions are managed securely, pass technical audit, and maintain State Record keeping compliance," said Peter Ferguson, Executive Manager, Information and Communication Technology, City of Vincent.

"We chose SafeGuard Cyber to protect vital communications channels from unauthorised account changes, while ensuring automated compliance via an integration with our existing document management system. SafeGuard Cyber has streamlined our social media information security and governance. This outcome supports the growing use of modern communication platforms without the added operational overhead."

## School's In for Teams

Faced with the sudden disruption of the COVID-19 school closures, a large Australian private school



was forced to rapidly transition to a virtual school environment. With staff and students isolated at home, Microsoft Teams became essential for keeping the virtual campus up and running.

The school needed to onboard students into a safe and secure virtual school environment, while adhering to strict record-keeping laws. The volume and velocity of messaging meant the school had no way to effectively monitor for cyberbullying, security threats, or ensure compliance.

In the first ten days, students and staff produced nearly 125,000 chat messages. The school had no way to prevent malicious content from migrating out of the Teams instance and into school networks. The school was unable to maintain the meticulous records required for legal recourse and conflict mediation.

To solve these challenges, the school implemented cloud-scale defence with SafeGuard Cyber. Across its Microsoft Teams instance, the school gained the power to detect obscene language, hate speech, and stop malicious files like ransomware.

The SafeGuard Cyber platform began automatically flagging signs of digital harassment and cyberbullying, as well as potential compliance violations. Customizable policies meant the monitoring system could be adapted for regional slang, and the platform's language-agnostic machine-learning analytics empowered the school to protect students communicating in other languages.

Full conversation threads were now retained, providing evidence in case of future audits.

In the first 10 days on Microsoft Teams, SafeGuard Cyber detected:

- 125,000 messages captured & archived;
- 1,989 instances of inappropriate conduct;
- 180 mentions of violent activity;
- 74 references to drug use; and
- 7 indications of malware attachments/links.

The school can now remediate threats in real-time, regardless of network or device.

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

## Trust in data privacy increases during pandemic: ANU

COVID-19 has seen Australians become more trusting of organisations and governments when it comes to their personal data and privacy, according to new research. The Australian National University (ANU) study examined more than 3,200 Australians' attitudes toward data privacy and security before and during the coronavirus pandemic, including the use of the COVIDSafe app.

Study co-author Professor Nicholas Biddle said the study also showed increases in trust "strongly related" to an increase in confidence in the Federal Government, state and territory governments and the public service.

"The level of Australians' trust, confidence and concerns about sharing their personal data and is a critical question during this pandemic," Professor Biddle said. "It directly relates to the extent to which governments are able to use personal data to monitor and control the spread of COVID-19. In turn, the extent to which governments' protect personal data will help shape the Australians' views about how their data is shared and used into the future.

"Our findings provide strong support for the notion that trust and confidence in different aspects of policy design and delivery interact with each other, creating vicious or virtuous circles."

The study measured Australians' trust in how their personal data was handled by governments and other

organisations on a scale of one to 10 – with 10 being the most trusting. The researchers found trust had increased "across the board".

"The organisation with the highest level of trust was the Australian Bureau of Statistics (ABS), which jumped from 6.42 to 7.10 between 2018 and 2020," Professor Biddle said. "The ABS was closely followed by universities (5.74 to 6.43), state and territories where people lived (5.36 to 6.36), and the Federal Government (5.46 to 6.29).

"However, the greatest increase in trust was for companies that people use to make online purchases, like banks and telecommunications companies, with trust for these companies increasing by almost 30%."

According to Professor Biddle, even social media companies saw an increase in trust, rising from 2.88 before the pandemic to 3.43 during the COVID-19 outbreak.

The researchers also examined how many Australians had downloaded the COVIDSafe app, with 44.7 per cent of males saying they had compared to 43 per cent of females.

The age group with the most downloads was 55 to 64 year olds, while 18 to 24 year olds had downloaded it the least. The study forms part of the COVID-19 monitoring program in the ANU Centre for Social Research and Methods. Download the report [here](#).

**CITADEL-IX**  
citadel information exchange

Secure  
Content Management  
Platform

# Top 10 reasons enterprises depend on pdfDocs for PDF editing and bundling

By Caitlin Burns, DocsCorp Content Manager

Dropbox reports that there are five billion PDF files in its service alone. Consider what that number would be if you included all the other file sharing and cloud storage services. There is no escaping the simple fact that PDF is everywhere and that every business needs a PDF tool.

How else would you package multiple file formats into a single file for easy and secure email distribution? Creating and printing PDFs is just the start.

There is no other file format that delivers so much: document sharing, collation, compression, reliability, and security. With pdfDocs, your users will be able to work more securely and efficiently

## 1. Create PDFs faster and with less effort

Create simple *PDFs of Microsoft Office files*, or collate many files and *output them as a secure PDF binder*. Users can easily optimize PDFs to meet government and legal industry requirements, including for submission to the US Patent and Trademarks Office. Plus, create and validate PDF/A files for archiving purposes and compliance with digital court filing requirements.

## 2. Smart editing that doesn't require conversion to Word

Make changes to your PDF documents quickly and easily with no conversion to Word needed. Working in pdfDocs users can add, remove, or rearrange pages; *apply digital signatures*; modify text or images; annotate, and much more. In-built text recognition *unlocks the content of scanned documents*, so changes can be applied quickly and easily without having to first convert the file to Word.

## 3. Get powerful features with Organizer Project Mode

Organizer Project Mode offers advanced features and PDF workflows. Workspaces can be set up for specific projects with a collated document set output as a single, secure PDF for easy distribution. PDFs can be imported into different Organizer Projects where all reviewing and editing processes can be actioned. From Organizer Project Mode, PDFs can be printed, merged, emailed, saved, shared on a network drive, or saved into a document management system. *See the difference between the two pdfDocs Modes explained.*

## 4. Merge documents more efficiently with the binder module

pdfDocs binder has powerful features that simplify the process of *combining multiple documents into a secure PDF* for easy distribution. It automates the assembly of vast numbers of documents and folders into a single PDF binder, complete with an interactive Table of Contents, Cover Page, and Bookmarks. Rather than starting over when you need to make changes to your binder, simply add new or amended documents as you go, and output to a single file when

you're done.

## 5. Save time with systems integration

Increase productivity with a PDF application that integrates directly with your core systems, including Microsoft Office. Users save time by saving and profiling PDFs directly into the relevant folders within *these leading document and case management systems.*

## 6. Add efficiency with document templates

Organizer and Binder Project templates make routine tasks more efficient. Users can work from a standard set of documents and modify them as needed - saving hours when it comes to creating regularly-used documents, like Closing Books or Corporate Minutes. These templates will have been set up to contain the necessary folders and a cover page. All the user has to do is add the relevant files, rename or reorder them as needed, edit the cover page, and press Make Binder. *Watch how to create a Binder Project from a template.*

## 7. Add failsafe document security

Document encryption, and restrictions on printing, copying, and modifying help protect sensitive information.

*pdfDocs' redaction tool* allows users to permanently redact an area of their document, eliminating the risk of getting it wrong and exposing information unintentionally. Features like Pattern Search save you time by finding common types of sensitive or confidential information quickly. Then, you can redact all instances, or pick and choose.

## 8. Apply custom numbering sets

Take the hassle out of *applying custom numbering sets* across a collection of documents. Standard formats include regular page numbers, time and date stamping, and Bates Numbering. You choose how the numbering set displays in the Headers or Footers of your PDFs, giving you control over the look and feel of your documents.

## 9. Automatic text recognition makes scanned files editable

In-built Optical Character Recognition (OCR) capability means the contents of scanned, or photographed documents can be edited or searched. Pages on an angle are deskewed automatically to improve the quality of your digital files.

Administrators can set up Watch Folders using pdfDocs to receive files from your printer or scanner as they are created. These folders can be configured to automatically convert incoming files to text-searchable PDFs. *Learn how to create, set up, and use Watch Folders.*

## 10. Microsoft Office integration

Users benefit from easy conversion to PDF from Microsoft Office applications including Word, Excel, and PowerPoint. Quick and convenient PDF conversion is also available for email attachments in Outlook.

[Download this as a PDF](#)

## 3 Common Office 365 Data Loss Scenarios

By Brent Middleton, AvePoint

When organizations experience data loss, the cost of not being able to run for a period of time can be massive. As such, most organizations that value their data should consider a third-party backup solution to ensure their data is fully protected and available no matter the scenario.

Let's have a look at some of these scenarios where extended data production can ensure the availability of information.

■ **1. User Error.** Accidents happen—we're human after all—which is why the most common data loss scenarios involve user error.

Users can accidentally delete documents, emails—and even an entire workspace (Group, Team, or *SharePoint site*) if they are an Owner. That's why Microsoft has effective out-of-the-box tools such as version control and the recycle bin to address these mistakes.

If a document has been deleted within 93 days, an email has been deleted within 14 days (or up to 30 days depending on your settings), or a workspace has been deleted within 30 days, you can simply restore these items from the recycle bin.

Third-party backup solutions allow you to extend these protections so you can restore Office 365 data even if it has been deleted for longer than 93 days.

■ **2. Admin Error:** Office 365 administrators and IT professionals are also human, and thus just as capable of making the occasional error.

One scenario could include messing up the permissions to a workspace. A third-party backup solution will be needed to quickly restore those permissions.

Another scenario would be forgetting or failing to set the proper retention setting—for example, not properly retaining a mailbox of an employee who has departed the organization.

After the 30-day window (and its almost always after), if a user needed to access that mailbox, or that data was needed for record/compliance purposes, a third-party backup solution would be required.

■ **3. Malicious Insiders:** On occasion, a disgruntled user or administrator may attempt to delete, corrupt or otherwise remove access to important data within Office 365. In most scenarios, the data can be easily restored using native tools.

However, if that malicious insider—either a user that is an Owner of a workspace or an administrator—“rolls back” or restores a SharePoint site from a previous point in time, a third-party backup solution is required to “move forward” and restore the data that has been created since that restore point.

*Want to learn about two other common data loss scenarios? [Download the full ebook.](#)*

## Driving Digital Transformation in the New Zealand Workplace.

AP Automation  
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# Data - The Eyes and Ears of AI

By Carsten Luedtge, Compart AG

**The global volume of data continues to grow strongly. Above all, unstructured data in the form of photos, audio files and videos as well as presentations and text documents will grow disproportionately - according to the market research institute IDC by an average of 62 percent annually. By 2022, this data type is expected to account for around 93 percent of the total volume.**

According to a Gartner definition, unstructured data includes "all content that does not correspond to a specific, predefined data model. It's usually human-generated and person-related content that doesn't fit well into databases." But this often contain valuable customer and behavioural information, the evaluation of which can be important for well-founded decisions.

In addition, in-depth analysis of unstructured data forms the basis for better and expanded services, which can even lead to completely new business models. IDC expects companies that analyze all relevant data by 2020 to achieve a productivity gain of \$430 billion over less analytically oriented competitors.<sup>2</sup>

Currently, companies are still looking for truly efficient solutions to convert unstructured data into structured data. They face a number of challenges, ranging from the question of geographic location, the type of data storage and governance, to securing and analyzing this information in local and cloud environments. So it is hardly surprising that the MIT Sloan Group classifies 80 percent of all data as untrustworthy, inaccessible or not analyzable. IDC estimates that by 2020 the "digital universe" will contain up to 37 percent of information that could be valuable if analyzed.<sup>3</sup>

## Digitization Means Automation

One thing is certain: Structured and analyzable data are the basic prerequisite for the next stage of digitization in customer communication. This refers to the extensive automation and standardization of processes, so that "human intervention" is less and less necessary ("dark processing"). Routine tasks such as service invoicing, confirmation of address and tariff changes or appointment agreements are already taken over by software solutions, language assistants and chatbots based on AI algorithms (self-learning systems).

What's more, even content with a high creative share, such as technical essays and the like, will sooner or later be generated by AI systems. Already today there are programs that can produce simple Wikipedia articles with simple syntax and grammar. You define certain reference points (structure, keywords) (for a text about a city, for example, the number of inhabitants, year of foundation, town twinning, geographical data) and the system retrieves the necessary data from Wikidata, supplements the corresponding stored text modules, which follow a simple grammar (subject - predicate - object) and merges everything into a finished text.

Many still remember the appearance of Google CEO Sundar Pichai at the IO developer conference in May last year, when he introduced the language assistant "Duplex": The chatbot is able to telephone independently without the called person noticing that

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he is dealing with an "artificial intelligence".<sup>4</sup>

With other processes, on the other hand, such as the cancellation of an insurance policy or the release of an invoice for more than 50,000 euros, for example, it is certain - partly due to regulatory requirements - that a clerk will continue to look into it in the future. But it is only a matter of time before such sensitive areas are also automated. The more reliable the systems become, the higher the threshold for automated processing can ultimately be set. However, this requires correct handling of the data.

Harald Grumser, founder and CEO of Compart AG, puts it in a nutshell: "Digital processes need access to the content of documents, and artificial intelligence also needs eyes and ears. It is therefore becoming increasingly important to obtain the data required for automation right from the start, to provide it with a structure and to store it correctly."

## Documents Are the Human-readable Representation of Data

That concerns also and exactly the document and output management as interface between classical (paper-bound) and electronic communication. Typically, digital data is converted into analogue data on the output side (e.g. when printing, but also when transforming text content into audio files ("text-to-speech")).

On the other hand, there is the situation in the inbox (input management), where exactly the opposite happens: Analogue data is converted into electronic documents (e.g. when scanning, but also when converting audio/video files into readable content) - albeit not necessarily in a very high-quality form.

The challenge now is to transform the information and data generated in all areas of inbound and outbound communication into a structured form and store it in the right "data pots" so that it is available for all processes of document and output management - from the capture of incoming messages (input management) to the creation and processing of documents and their output.

It is irrelevant on which digital or analogue medium a document is sent or displayed: It is always about the data, because a document is ultimately only its respective representation in a form readable by humans - whereby a distinction must be made here between non-coded and coded documents

In this context, two major trends should be mentioned, which are becoming more and more important and have almost replaced other developments:

■ XML (Extensible Markup Language) as a markup language for complex, hierarchical data, and

■ JSON (JavaScript Object Notation) as a compact data format (similar to XML, only simpler), which today is mainly used in web services. (see also the glossary).

Both technologies have proven themselves for the description and definition of structured data and will certainly play an even greater role.

## Data Must Be Checked, Transferred and Stored Correctly

To ensure that the structured data is actually available

for automated processing, it is important that it is stored correctly. Here, non-relational databases such as NoSQL (including the subcategories Graph Database and RDF) now offer new possibilities. Their great advantage over relational databases is that they can manage data even in very complex contexts and thus enable very specific queries (see also the "Glossary").

One of the best known applications for this is Wikidata, the knowledge database of the online encyclopedia Wikipedia, in which tens of millions of facts are now stored. If, for example, you want to know how many Bundesliga players who were born in Berlin are married to Egyptian women, you will certainly find what you are looking for here. Certainly - a very unusual example, but one that makes the significance of the subject clear.

The aim is to gain new connections/knowledge from structured data about algorithms (ontologies). This is where artificial intelligence (AI) comes into play, which can then be used to formulate complex queries.

A further important topic in this context is that the stored data with a structure must be checked - something that is often not done today. The XML schema, for example, is a proven method for guaranteeing the correctness and completeness of an XML file. Errors caused by unchecked data can be very serious.

Consistent data verification is therefore essential. Last but not least, the data must also be converted into each other using rules. There are also many possibilities for this today, one of the best known is certainly the programming language XSLT. But there are also other sets of rules.

## Instead of Destroying Content....

Anyone who wants to further increase the degree of automation of processes in customer communication in the sense of the next stage of digitization must ensure structured, consistent and centrally available data. For document and output management, this means preserving the content of documents as completely as possible right from the start instead of destroying it - as is often observed in the electronic inbox of companies, for example.

The problem here: In many companies, incoming e-mails are still "typed", i.e. converted into an image format, in order to subsequently make parts of the document content interpretable again by means of OCR technology. It's "Deepest Document Middle Ages." It wastes resources unnecessarily, especially when you consider that email attachments today can be quite complex documents with tens of pages.

Above all, however, this media discontinuity is tantamount to a "data gap": electronic documents (e-mails), which in themselves could be read and processed by IT systems, are first converted into TIFF, PNG or JPG files. So "pixel clouds" arise from content. In other words, the actual content is first encoded (raster images) and then made "readable" again with difficulty using Optical Character Recognition (OCR). This is accompanied by the loss of semantic structural information, which is necessary for later reuse.

How nice would it be, for example, if you could convert e-mail attachments of any type into structured PDF files immediately after receipt? This would lay the foundation for long-term, revision-proof archiving; after all, the conversion from PDF to PDF/A is only a small step.

## ...Rather Preserved Than the Basis for Further Automation

The following example: A leading German insurance group receives tens of thousands of e-mails daily via a central electronic mailbox, both from end customers and from

external and internal sales partners. Immediately after receipt, the system automatically "triggers" the following processes:

■ Conversion of the actual e-mail ("body") to PDF/A

■ Individual conversion of the e-mail attachment (e.g. various Office formats, image files such as TIFF, JPG, etc.) to PDF/A

■ Merging of the e-mail body with the corresponding attachments and generation of a single PDF/A file per business transaction

■ At the same time, all important information is read from the file (extracted) and stored centrally for downstream processes (e.g. generation of reply letters on an AI basis, case-closing processing, archiving).

Everything runs automatically and without media discontinuity. The clerk receives the document in a standardized format, without having to worry about preparation (classification, making legible).

The insurer could still "split" the workflow into dark and interactive processing. During dark processing, every incoming e-mail plus attachment is automatically converted into a PDF/A file, transferred to the clerk and finally archived.

Interactive processing, on the other hand, involves the "intelligent" compilation of e-mail documents of different file formats into an electronic dossier (customer file/process). The clerk first opens the e-mail and the attachment on his mail client (Outlook, Lotus Notes, etc.) or his special clerking program and decides what needs to be edited. The normal workflow then applies as with dark processing: conversion - forwarding - processing - archiving.

The interactive variant is particularly useful if not all documents have to be archived. Modern input management systems are now capable of automatically recognizing all common formats of e-mail attachments and converting them into a predefined standard format (e.g. PDF/A or PDF/UA). And: You extract all necessary data from the documents at the same time and store them centrally.

Such scenarios can be implemented, for example, with systems such as DocBridge Conversion Hub, whose linchpin is a central conversion instance. Its core is a kind of "dispatcher", which analyses every incoming message (e-mail, fax, SMS, messenger service, letter/paper) and automatically converts it into the optimal format for the document in question. How is the further processing to take place? decides. DocBridge Conversion Hub also includes an OCR function for extracting content and metadata (Optical Character Recognition).

<sup>1</sup> CIO online, 09/23/2019 („KI ebnet den Weg zu unstrukturierten Informationen“)

<sup>2</sup> Ebenda

<sup>3</sup> Ebenda

<sup>4</sup> The example of an agreement for a hairdresser's appointment showed the new dimension of intelligent speech systems such as "Duplex": Previous systems can usually be recognized as "robots" within a few words (unnatural sounding voice, wrong emphasis, choppy sentences, wrong or no response to requests). Not so AI tools of the new generation: They are quite able to capture content with complex syntax and "talk" so skilfully with people that they do not notice who or what their counterpart is.

See also <https://www.compart.com/en-US/digital-inbox-inbound-communication>

Compart AG is a global provider of Multi Channel Document Management Solutions, headquartered in Germany. Originally published at <https://www.pdfa.org/data-eyes-and-ears-of-the-ai/>

# ACT to deploy Epic Digital Health

The ACT Government has contracted global software company, Epic, to implement its digital health record software across Canberra's public health services. This includes ACT public hospitals, community health centres and nurse-led walk-in centres.

ACT Health Chief Information Officer Peter O'Halloran said this technology will enable patient records to be updated in real-time, equipping health professionals with all the information needed to provide exceptional care, no matter their location or specialty.

"In Australia, the Epic system has been implemented at the Royal Children's Hospital in Melbourne and will be expanded to the Royal Melbourne Hospital, Royal Women's Hospital and Peter MacCallum Cancer Centre in the coming months.

"Some of the safety and quality benefits that other health services have realised as a direct result of using Epic's software include reduced mortality rates, reduced medication errors and an increase in staff and patient satisfaction. It will also support us to implement new ways of caring for our community, with a patient portal, telehealth capabilities and artificial intelligence opportunities.

"This technology will enable patient records to be updated in real-time, equipping our health professionals with all the information they require to provide exceptional care, no matter their location or specialty," said Mr O'Halloran.

The ACT Digital Health Record will complement the national My Health Record, providing more detailed data and information. This will include observations from clinicians, details about administered medication and information from devices such as heart rate monitors. Healthcare workers will be able to access information on which bed a patient is assigned, operating theatre bookings and surgery staffing information.

## Hospital choice for ABF Compliance

EIS Health Data Solutions has announced the successful implementation of TurboGrouper at St Vincent's Public and St Vincent's Private Hospitals Melbourne with full Patient Administration System (PAS) integration.

As long-term users of TurboCoder for medical record coding, St Vincent's Public and Private Hospitals are now able to streamline their coding and grouping operations as the TurboGrouper includes TurboCoder for seamless coding and grouping functionality.

Alfred Papallo the Managing Director of EIS Health Data Solutions said "We appreciate and are very grateful for the collaboration from all parties, St Vincent's Public and Private Hospitals, the PAS vendor and our software development team at EIS, to bring this deployment to fruition".

Mr Papallo also said that, "EIS is Australian owned and the TurboGrouper is designed, developed and supported in Australia and for the first time Australian Hospitals now have a choice, and can receive the IHPA ICD-10-AM/ACHI/ACS and AR-DRG updates promptly following their release. This alone will enable our clients to code and group more accurately, and save

them significant time and effort obviating the need for retrospective re-coding and re-grouping.

As the TurboGrouper core technology is a proprietary EIS eComPress solution, it changes the game with ultra-fast installation with minimal server and network capacity required, and provides fully auditable results. Importantly the EIS TurboGrouper proprietary Multi-User networking technology provides support for large numbers of users with no additional server hardware required. That's also a significant ongoing saving".

TurboGrouper is test and approved to verify the correct AR-DRG is assigned to patient coded data by the Independent Hospital Pricing Authority (IHPA) and EIS Health Data Solutions is based in Sydney Australia and has been supporting healthcare with clinical coding, grouping and batch grouping solutions since 2000.

## AirAsia accelerates with JIFFY.ai RPA

Malaysia's AirAsia Group is accelerating its ongoing digital transformation journey further by implementing robotic process automation (RPA) in collaboration with Silicon Valley and India-based enterprise automation platform JIFFY.ai.

Chief Transformation Officer Azli Mohamed said the implementation of RPA followed a review of AirAsia's internal processes and workflows, which showed that business process automation can be done easily with the right tools in place.

AirAsia has appointed India and US- based JIFFY.ai to initiate its RPA adoption, which began in May 2020. The implementation leverages JIFFY.ai's artificial intelligence (AI)-enabled automation platform, which brings intelligent automation, intelligent document processing and analytics together in a single solution.

The RPA adoption within AirAsia Group is led by select internal functions and departments in stages and will include innovative use cases to boost existing revenue optimization. Business process automation represents the next step forward in AirAsia Group's ongoing digital transformation process across the organization, which has been ongoing since 2016.

Pioneering RPA projects are identified through AirAsia Group's CEKAP framework, which is designed to facilitate innovation and promote efficiency internally. Among departments identified to-date include AirAsia Global Shared Services, which expects to achieve significant cost savings and efficiency gains within 180 days of RPA adoption.

The latest key milestones in the digital transformation journey so far include the implementation of end-to-end contactless procedures in May 2020 to facilitate essential travel. These procedures include contactless payment kiosks, enhanced features on the AirAsia mobile app and contactless kiosks in all operating airports across Malaysia, Thailand, Philippines, Indonesia, and Japan.

With the contactless kiosks, guests making their essential travel can print their boarding pass and baggage tag after checking-in online on airasia.com or through the mobile app, ensuring a full contactless check-in process. The enhanced AirAsia mobile app enables travellers to scan their passports via the app itself, further facilitating a contactless check-in process with more features to be progressively added moving forward.



### BACKGROUND

ProLift Industrial Equipment is one of the Midwest's largest Toyota-owned dealers of forklifts, pallet jacks, reach trucks and other material-handling equipment. The company operates nine locations across Kentucky, Ohio, Indiana and West Virginia, selling, renting and servicing equipment manufactured by the industry's leading brands. ProLift's clientele ranges from major corporations to smaller, single-store businesses.

ProLift's own business had been expanding steadily since 2007 when the company was acquired by Toyota Industries North America (TINA). But, as order volume increased, the technical limitations of ProLift's ERP began to create friction during the company's post-sale activity. In talking with collections personnel, ProLift identified the following outstanding needs:

- Visualisation of all collection activities (e.g., via a dashboard)
- Customisable call lists and contact follow-up reminders and management tools
- Automated workflows capable of eliminating redundancies
- Seamless interoperability with existing and future ERP systems

### SOLUTION

After vetting several solutions, ProLift ultimately selected Esker's cloud-based Collections Management software. With its ability to integrate with ProLift's Microsoft Dynamics NAV ERP, Esker's solution has introduced a new level of transparency to the company's invoicing and payment tracking processes. ProLift's internal stakeholders can now quickly resolve collections issues using a plethora of varied and highly localised data points.

Thanks to the Collections Management solution's extensive menu of options, ProLift staff can now:

- Generate customised reports
- Assemble more actionable call lists
- Access granular customer activity data across a range of touchpoints and categories, from new sales to parts, service and rental (PSR)

Stuart Geiger, ProLift's Corporate Controller, notes that Esker's Collections Management solution has even helped ProLift better manage customer lines of credit. In addition to aiding with risk management, this functionality has also been critical in elevating the level of customer service it can provide.

"With Esker, I can instantly collocate and analyse all 2,000 customers who have an open balance," Geiger explains. "I can then make decisions about which customers have too high of a credit line, which don't have enough available credit, and which are approaching their credit limit and need to be engaged."


ESKER HAS BEEN VERY VALUABLE TO US. THE COLLECTIONS MANAGEMENT SOLUTION HAS ALLOWED US TO PINPOINT AND IMPROVE WHERE OUR RECEIVABLE PROBLEMS EXIST.


STUART GEIGER | CORPORATE CONTROLLER

### BENEFITS

Beyond the expected improvements, Esker has delivered invaluable business intelligence about inaccurate data introduced to invoices during ProLift's order entry process. Whether they contain an incorrect mailing address or reference the wrong PO number, such invoices are not collectable. Knowing that those problem invoices stem from front-end errors rather than back-office operations has enabled ProLift to distinguish — as Geiger puts it — "the symptoms from the disease." Since implementing Esker's Collections Management solution, ProLift has:

 **REDUCED PAST DUE PAYMENTS BY 60%**, from 11,479 to 4,669

 **BOOSTED THE COLLECTIONS TEAM'S OVERALL PRODUCTIVITY** by implementing better QA and clearing bottlenecks at every stage of the AR process

 **DECREASED DAYS SALES OUTSTANDING (DSO) FROM 55.4 TO 48.3** within two years, significantly enhancing reconciliation efforts

 **IMPROVED AVERAGE RESPONSE TIME ON CUSTOMER INQUIRIES TO 36 HOURS** since implementation

In the near future, ProLift hopes to implement Esker's customer payment portal to make their end-to-end AR processes even more efficient.

ESKER'S COLLECTION MANAGEMENT SOLUTION HAS ALLOWED US TO BETTER MANAGE WHAT WE'RE DOING AND INTELLIGENTLY ANSWER QUESTIONS ABOUT WHY AND WHERE WE'RE PLACING OUR RESOURCES.

STUART GEIGER | CORPORATE CONTROLLER

### ABOUT PROLIFT

**Industry:** Industrial Equipment

**ERP:** Microsoft Dynamics NAV

**Solution:** Collections Management

Founded in 1978, ProLift Industrial Equipment began as Louisville Lift Truck, a forklift rental house in Louisville, KY. Today, as a Toyota Material Handling Company, ProLift is a full-service forklift and material-handling dealership operating nine locations, employing 450 workers and offering multiple product lines.

  
www.esker.com.au

# Digital Transformation 2020 Australia/NZ Survey

**Businesses are struggling to extract key information from unstructured data because of legacy IT systems, according to a new survey conducted for AI-powered data company Syph.**

The survey identified Digital Transformation (DX) is failing to deliver eagerly anticipated advances in intelligent document processing, and almost half of digital decision-makers at Australian and New Zealand enterprise and government organisations have yet to commence their DX journey.

The survey found more than two-thirds (70%) of businesses report that some unstructured data is kept in original format which remains siloed or lost in email, printed documents and PDFs, and never digitally extracted for use in multiple information systems.

The research, conducted in May by IDM and included 125 participants across 25 industries, also revealed the most popular use of data capture was in accounts payable systems to process invoices, with more than two-thirds (67%) of businesses using it in some form.

"The results of the survey tell us about how far along the path of digital transformation organisations currently are, and how they are evaluating the progress and success of their initiatives – we can conclude that organisations are struggling to cope with rising volumes of unstructured data," said Warren Billington, CEO of Syph.

We found that Digital Transformation is failing to deliver eagerly anticipated advances in intelligent document processing. Almost 90% responded that they have an unstructured data problem to some degree. Some of that unstructured data will be managed but surveys have shown that typically 55% of an organisation's data is dark, unquantified and untapped.



We surveyed more than 100 senior information, IT and records professionals across a broad range of industry sectors in Australia and New Zealand to learn how they are moving away from legacy systems, processes, and operations to a digital model - and what they are hoping to achieve from the transformation process.

The survey was undertaken by invitation to readers of Information & Data Manager (IDM) Newsletter and members of Australia's Institute for Information Management (IIM). The survey was undertaken in partnership with industry sponsor Syph.

There were a wide array of industry sectors represented, with about one third of responses coming from all levels of government.

Many of those who participated are driving digital transformation at some critical organisations in industry and government. These included CIOs, Business/Data/Solutions Architects and Business Analysts at some of ANZ's largest organisations. More than half of responses were from organisations with 1000+ employees.

The problem is only getting worse. Over 80% responded that for business processes using unstructured data, the volume of data is growing. Almost one quarter said it is growing rapidly.

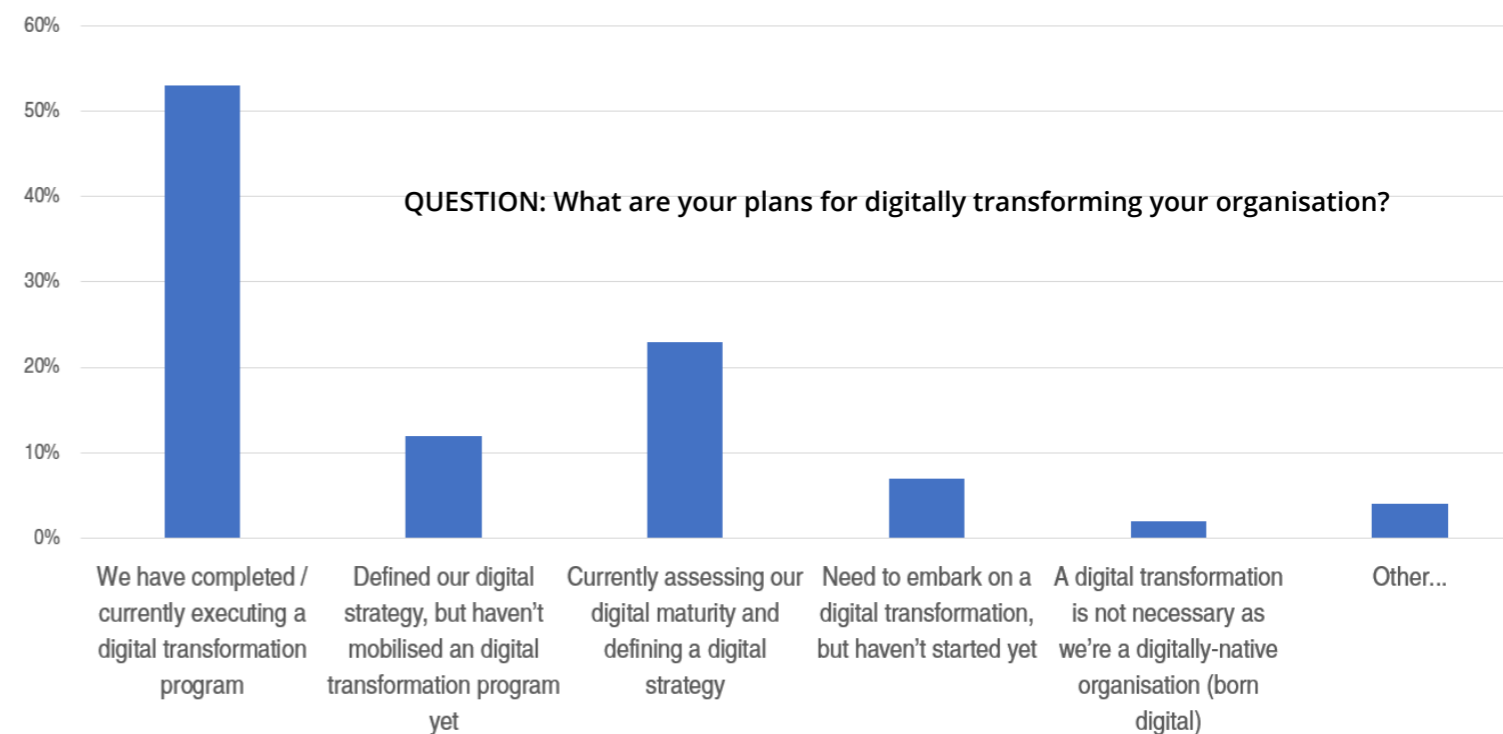
Cloud-based Storage & Computing	81%
Collaboration tools (MS Teams, Slack, etc.)	75%
Secure File Sharing	63%
Enterprise Content Management (ECM)	63%
Business Process Management (BPM)	57%
Mobile App / Site	54%
Distributed Data Capture	32%
Content/Text Analytics	29%
Robotic Process automation (RPA)	29%
AI-based Automatic Classification	22%
Internet of Things (IoT)	21%

QUESTION: What technologies & capabilities are being delivered as part of your digital transformation?

AI-based Automatic Classification	55%
Cloud-based Storage & Computing	50%
Business Process Management (BPM)	50%
Enterprise Content Management (ECM)	50%
Collaboration tools (MS Teams, Slack, etc.)	44%
Content/Text Analytics	43%
Mobile App / Site	42%
Secure File Sharing	39%
Robotic Process automation (RPA)	38%
Distributed Data Capture	31%
Internet of Things (IoT)	30%

QUESTION: What technologies & capabilities would you like to be delivered as part of your digital transformation?

While over 60% expressed a desire to implement AI-based Automatic Classification of Unstructured Data, only 23% say this is being delivered. There was a similar gap for Content/Text Analytics (45% DX Desire vs 28% DX Delivery).



Over 70% of organisations report that some unstructured data is kept in original format (documents, emails, etc) and never digitally extracted for use in multiple information systems, while 26% were unsure whether this occurred.

This is a very high number and really illustrates the Dark Data problem.

### What is Driving Digital Transformation?

The meaning of digital transformation is still often confused with emerging technology, cloud computing, or IT modernization. Even the research experts have trouble agreeing on a definition. In a recent report, Digital Rewrites the Rules of Business, Forrester Research states "the reality is that digital transformation has become so widely misused it's now synonymous with any technology-driven business improvement."

Of those surveyed who responded that they were undertaking or had completed Digital Transformation, there was no great consensus on the metrics that apply. While over 20% agreed that the measure of Digital Transformation success relates to the extent of digitisation and automation of internal and outward-facing business processes, a similar number stated that Digital Transformation is an ongoing process and change is constant.

Almost no respondents expect DX will completely eliminate manual work, although most 67% expect it will reduce manual work significantly. Only half of the organisations surveyed responded that they are currently using intelligent document scanning and capture technologies.

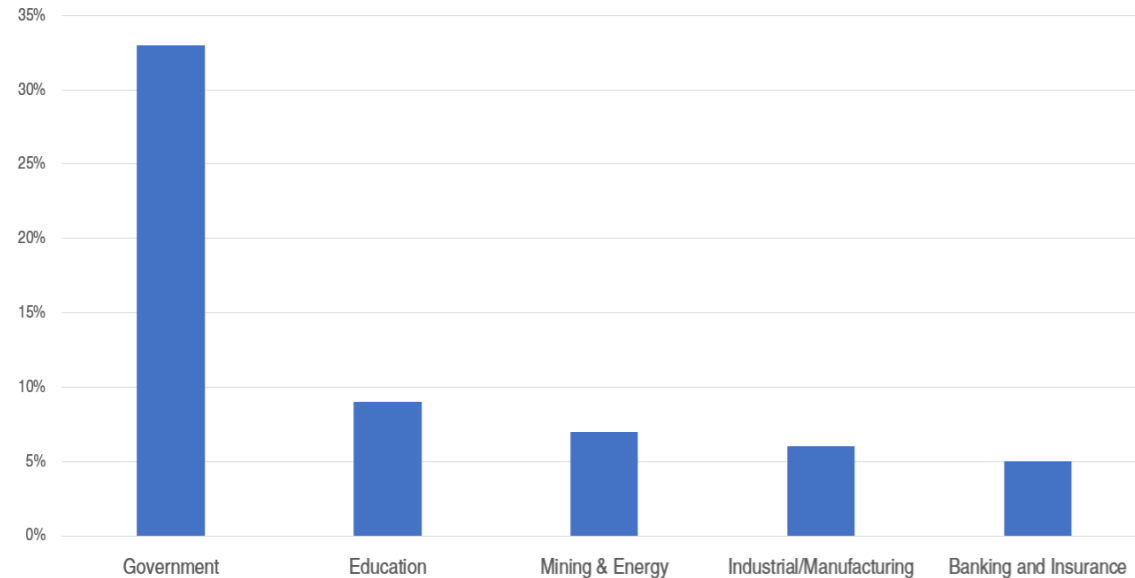
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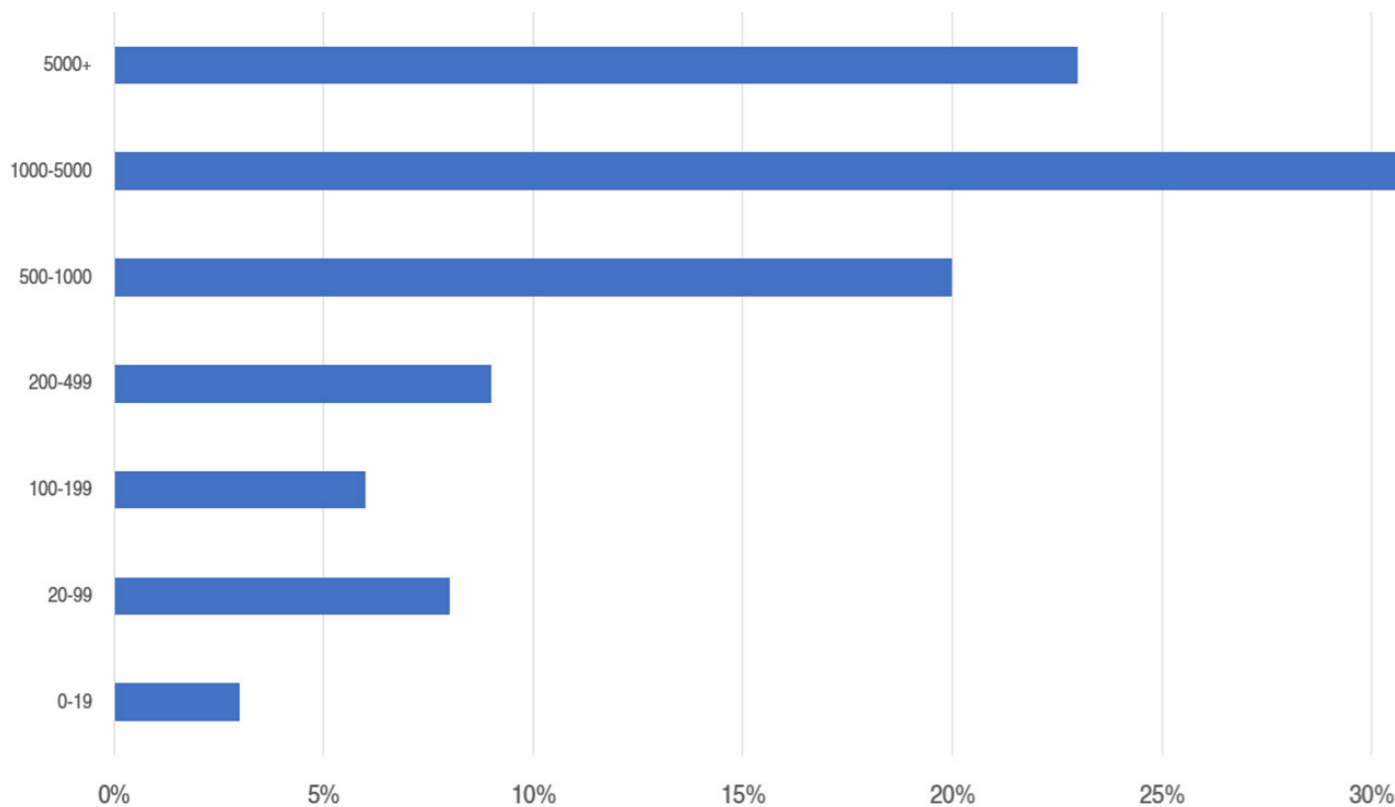
# WHO WE SURVEYED

Below is a sample of those who contributed to this survey, all playing a leading role in digital transformation at some critical organisations in industry and government.

<b>Business Architect</b>	<b>Australian State Police service</b>	<b>5000+ staff</b>
<b>Data / Solutions Architect</b>	<b>Major Australian Utility</b>	<b>1000+ staff</b>
<b>Head of Digital</b>	<b>Australian Food Manufacturer</b>	<b>5000+staff</b>
<b>Director/Records Manager</b>	<b>Australian Commonwealth Agency</b>	<b>5000+ staff</b>
<b>Global ICT Manager (CIO)</b>	<b>NZ Manufacturer</b>	<b>500+ staff</b>
<b>Senior Business Analyst</b>	<b>Big 4 Australian Bank</b>	<b>5000+ staff</b>
<b>Chief Information Officer</b>	<b>NZ Local Government Authority</b>	<b>500+ staff</b>
<b>CIO</b>	<b>Australian Electrical Wholesaler</b>	<b>500+ staff</b>
<b>Chief Information Officer</b>	<b>Australian NFP</b>	<b>500+ staff</b>
<b>Chief Information Officer</b>	<b>Australian Manufacturer</b>	<b>1000+ staff</b>



Top 5 Industry Sectors



This chart shows the distribution by number of employees. More than half of those who responded to the survey came from organisations with 1000+ employees.



Warren Billington, CEO of Syphr, Syphr is an enterprise SaaS business founded in 2018, in a partnership between the BPAY Group, a subsidiary of the big four banks in Australia, and BCG Digital Ventures, a subsidiary of the global Boston Consulting Group.

Based in Sydney, Syphr is an independent business within the BPAY Group leveraging the strength of both of its corporate partners.

A team of world-class data scientists and engineers has been established to help customers unlock the value in their hidden data.

A machine learning approach to extraction enables Syphr to create customized, high-accuracy data models based on provided document examples, without the need for expensive rule-based or template setups.

Learn more and apply for a trial at <https://www.sypht.com/> or get in touch with any questions at <https://www.sypht.com/contact>

(From Previous Page)

This result highlights a real challenge for organizations today in terms of being able to capture access and connect data and insights into their business processes, according to Syphr CEO Warren Billington.

Syphr is an AI-as-a-service platform, that instantly and accurately extracts and interprets valuable information trapped in invoices, receipts, passports, payslips, images, and more.

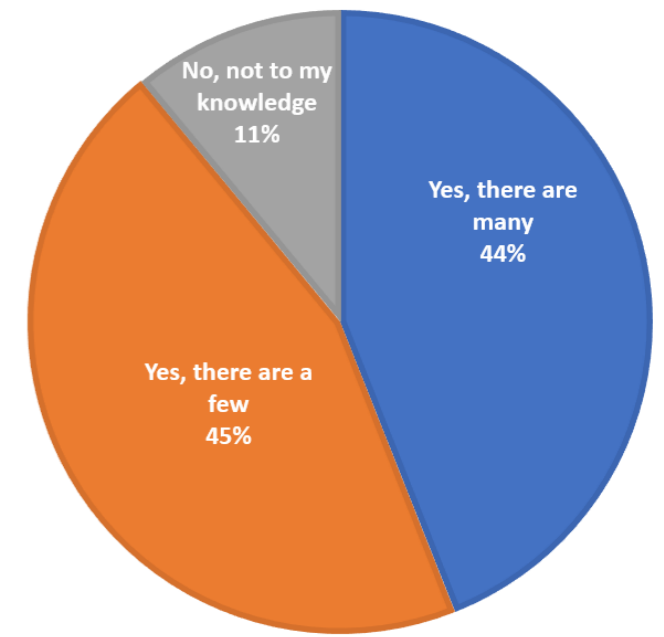
"This survey has demonstrated what a really large proportion of data that organizations are struggling with today from an unstructured perspective," said Billington.

"There's an interesting fact that by 2025, the rate of growth of data will be the equivalent to a new Google every four days, which is really quite astonishing.

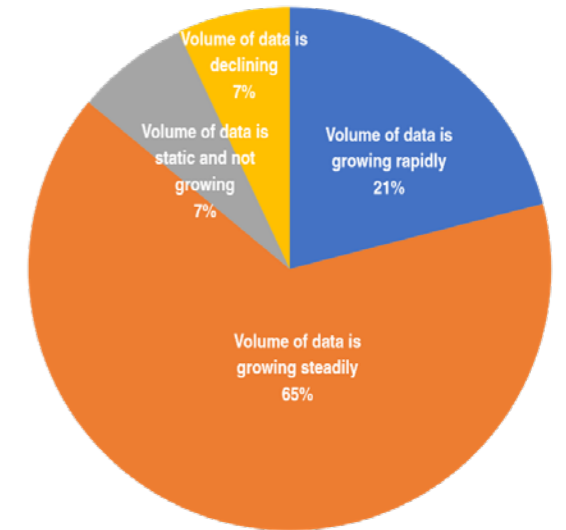
"There are specific obstacles to digital transformation presented by manual processing of unstructured data and documentation."

Syphr is currently working with a number of customers, especially in the US market, that are addressing a

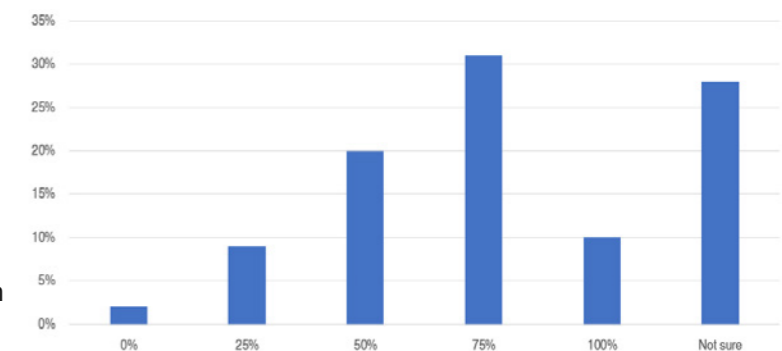
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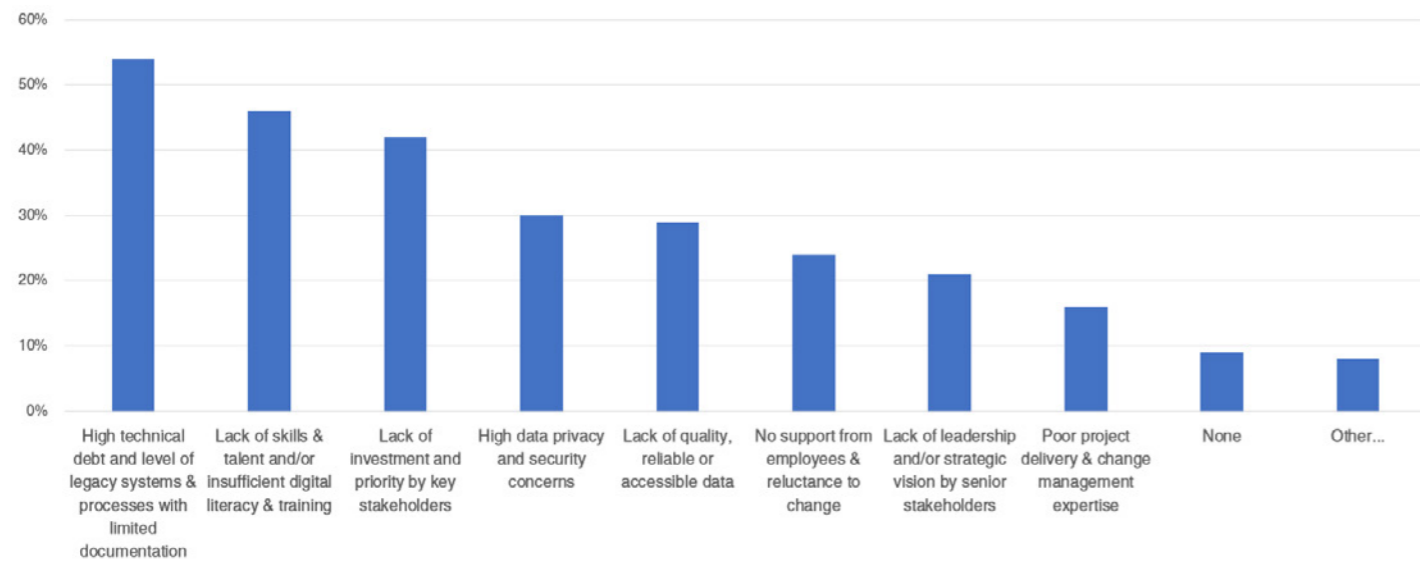
Are there business processes within your organisation, that require information to be extracted from unstructured data such as documents, images, emails, and more?



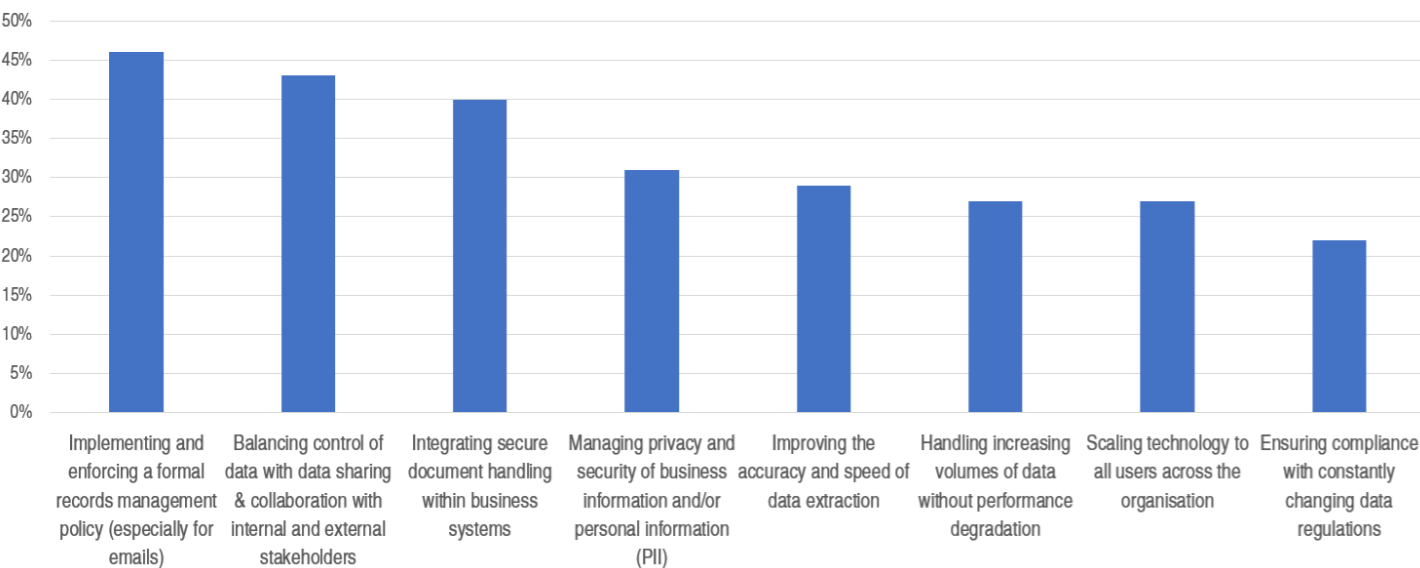
For business processes using unstructured data, how is the volume of data processed trending?



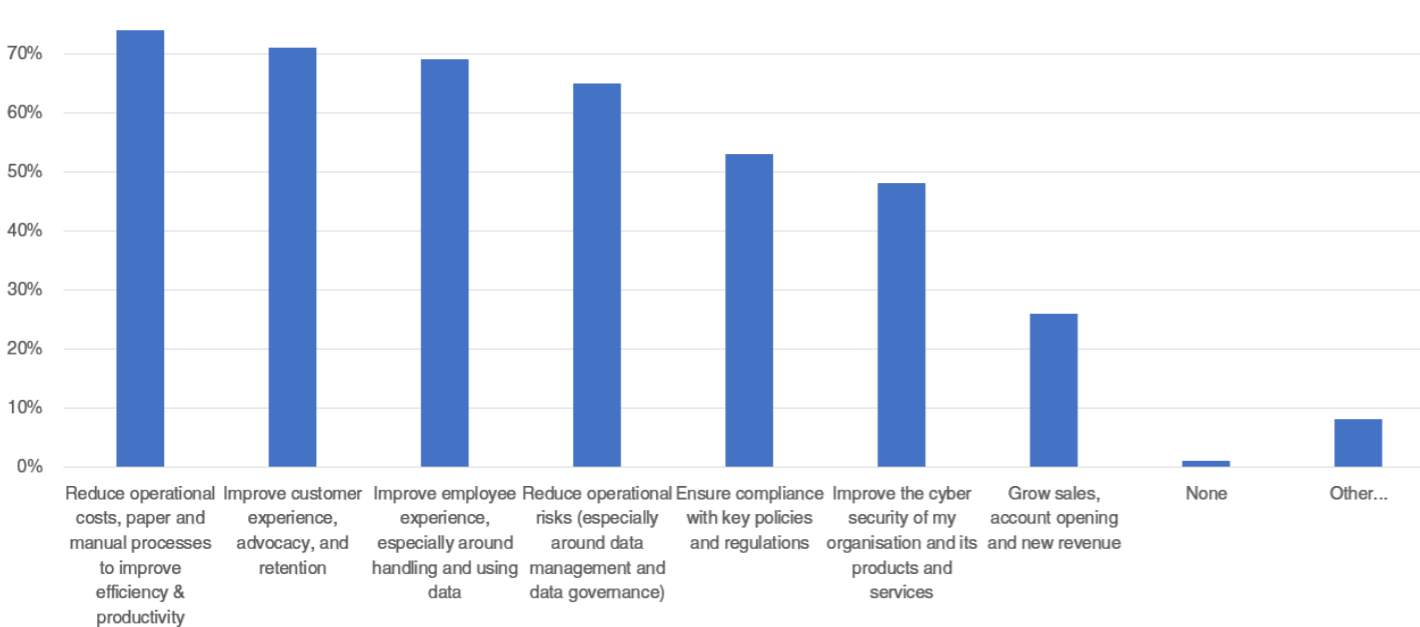
How much of your organisation's unstructured data is kept in original format (documents, emails, etc) and never digitally extracted for use in multiple information systems?



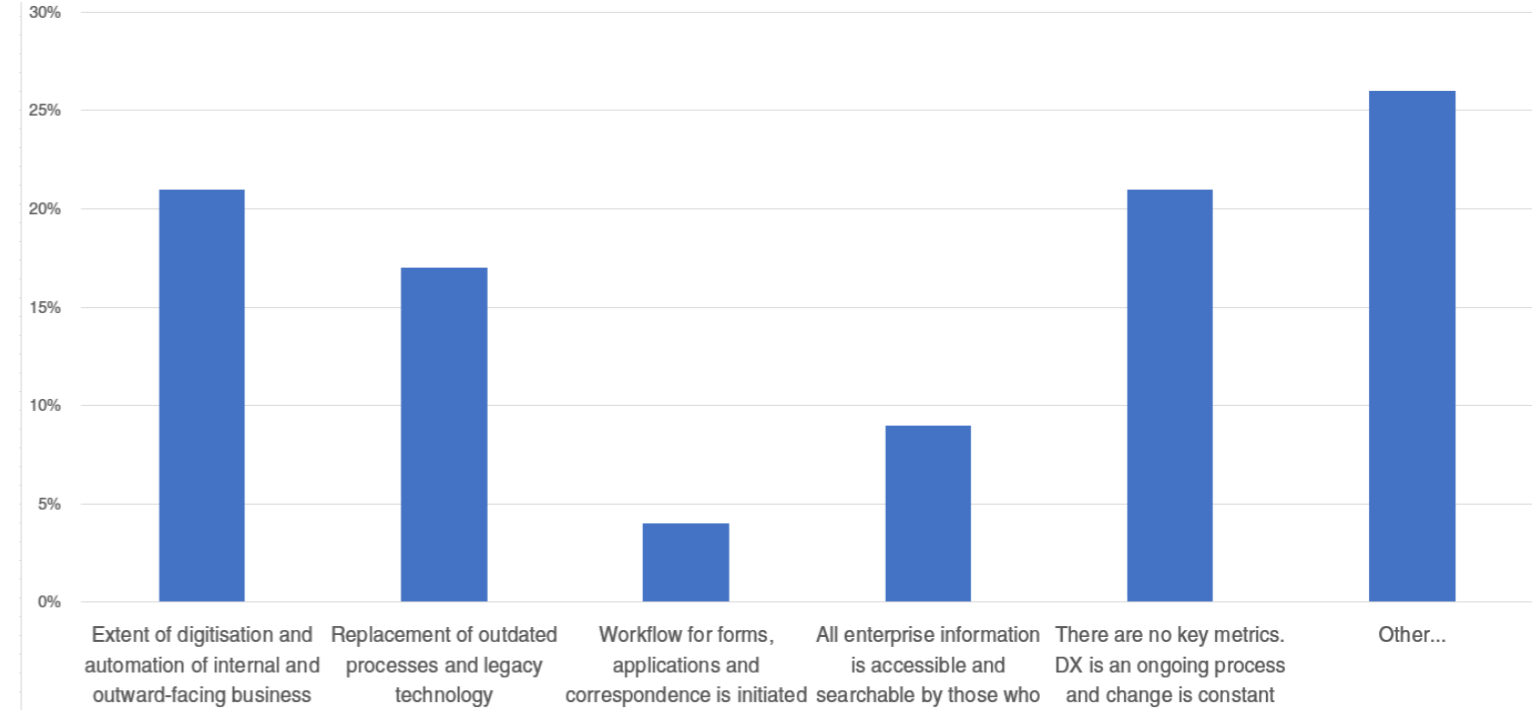
**QUESTION: What are the main barriers facing your digital transformation agenda? (We asked people to choose their top 3 but not many could limit themselves to 3 so it shows the barriers are broad and multiple.)**



**QUESTION: What are the top document management pain points within your organisation?**



**QUESTION: What are the main goals of your digital transformation?**



**QUESTION: What is the key metric used to assess completion of digital transformation at your organisation?**



(From Previous Page)

significant backlog of manual processing of documentation as it relates to documents that are managed out in the field.

“Businesses are looking at operational transformation, business continuity and how they can reduce costs, but also how they can grow business in the future,” said Billington.

“While this survey has shown that many organizations are not using intelligent process automation or any form of capture at all, many of those who responded in the affirmative are using some form of legacy technology.

“I think businesses are trying to look at digital transformation holistically, and these results show that most are taking an enterprise-wide approach to digital transformation. But in some cases this can be counter-productive as the change management challenge is a major hurdle.

“We are starting to see many organizations instead look at particular areas of their business, and by addressing those first and really quickly demonstrating value and delivering quick ROI, this then creates the business case for a broader digital transformation implementation,” said Billington.

In Deloitte’s recent 2020 State of AI in the Enterprise report, when asked to identify the top two benefits they were seeking from AI, respondents’ top choices were “making processes more efficient” and “enhancing existing products and services.”

The global survey of 2,737 information technology and line-of-business executives found that many companies are still using AI mostly in IT- and cybersecurity-related functions.

“Our study results show that while early adopters of AI are still bullish, their competitive advantage may be waning as barriers to adoption continue to fall and more creative use of the technology grows,” said, Nitin Mittal, principal and AI co-leader, Deloitte Consulting LLP.

“In the era of pervasive AI, where capabilities are readily available, organizations should go beyond efficiency and push boundaries to create new AI-powered products and services to be successful.”

The COVID-19 pandemic has accelerated digital transformation across all sectors, with businesses and government reprioritising and working towards their future roadmap strategy. The crisis mode has led to organisations ripping up their continuity plans and looking at everything from scratch.

Companies are hurrying to leverage next generation digital technologies to boost efficiency and productivity while reducing costs and challenges after the pandemic.

In 2019, nearly US\$380 billion was spent in the Asia-Pacific region alone on technologies and services intended to promote the digital transformation of business practices, products and organizations, according to market researcher IDC. The five-year compound growth rate from 2017 to 2022 is expected to reach 17.4 percent per year.

“In the finance function, technology has come on leaps and bounds, which means that it is able to deliver against a digital vision and enable that digital mindset,” says David Anderson, partner and digital finance transformation specialist at Deloitte.

“Whereas in the past, the technology would have hampered some of that ambition.”

# 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 are duplicates, according to AuditNet.

50 | information & data manager

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.*

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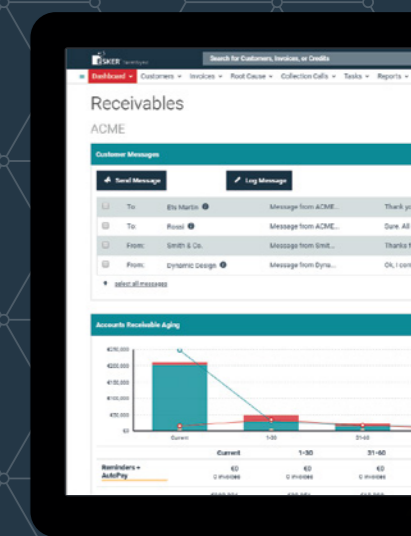
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■ **IMPROVE CUSTOMER RELATIONSHIPS** with automated tools designed for the customer experience, including customer portal, online payment, intelligent collections & dispute management.

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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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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.

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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 automation of enterprise work.

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

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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 Compeno-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.

**Upsol**  
Phone: 0800 003 115  
Email: [sales@upsol.co.nz](mailto:sales@upsol.co.nz)  
Web: <https://upsol.co.nz/>



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.

**iCognition**  
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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.

**Docscorp**  
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Web: [www.docscorp.com](http://www.docscorp.com)



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**  
Phone: 1300 375 565  
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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.

## Data Intelligence & Automation Platform

Software developer Aparavi has launched a new platform available in the Azure Marketplace, that enables data discovery with automated classification and data optimization (including removal).

The company says it reduces the complexity and cost of managing large unstructured data volumes. It gives users visibility and insight into data, and, more critically, triggers action based on its lifecycle, access requirement, content, risk level, regulatory policy, and hundreds of other criteria.

It finds data across the boundaries of diverse systems and locations and unlocks its full value through sophisticated search, index, and classification functions to create an organized virtual data lake for modern applications.

Managing data lifecycles and effective information governance are priorities for today's enterprises. Aparavi's platform provides intelligence into the data and its business relevance, finding data across the entire enterprise, regardless of where it resides, through powerful automation tools that discover, classify, optimize, and enable innovation while reducing human error.

The Platform addresses solution use cases of finding and controlling data, optimizing data availability for cost savings, and fuelling innovation.

Capabilities and benefits include:

**Classification, Index, Discovery, and Reporting in one easy-to-use interface** - Aparavi provides comprehensive data intelligence and management in one platform, rather than licensing numerous expensive complex products, and gives a clear understanding of unstructured data from cradle to grave. More than 140 predefined classifications address regulatory compliance for vertical industries and countries, with more than 800 patterns recognized.

**Automated Control over All Unstructured Data** - Assign retention policies to unstructured data and automatically copy, move, and delete based on those policies. The Platform empowers users with the insight to know what can, can't, and should be deleted based on regulatory or nonregulatory requirements. The Platform addresses all unstructured data down to the content and metadata level, even image and video files and their OCR text.

**Data Visualization and Cost Analysis** - Understand what data exists, where it resides, who owns it, and how much it costs to maintain. Aparavi aids in data and IT consolidation by identifying and classifying critical data and redundant, obsolete, trivial data that can be removed, typically delivering 30% to 40% savings in data infrastructure.

**Core to Edge/Cloud/Endpoint Support** - Users can manage risk, cost, and data sprawl no matter where unstructured data is stored. Alleviate risk and prevent data leakage across distributed repositories

in data center storage, cloud storage, and even endpoints for a true defensible deletion policy. This comprehensive control makes it easy to comply with requests to remove PII data for GDPR, CCPA compliance, and other regulations.

Aparavi, The Platform SaaS version, is exclusively available on the [Microsoft Azure marketplace](https://www.microsoft.com/marketplace). Pricing for Aparavi, The Platform starts at \$US1,788 per month for up to 50 terabytes of data or 50 million files under management, with 5 classification policies for the Business Pack. A 'Starter' release of the Aparavi Platform, supporting up to 5 TBs or five million files with one classification policy, is available today on the Microsoft Azure Marketplace at no charge. This allows users to easily test-drive the solution and then simply scale with purchase of additional files/capacity and classification policies or work directly with their Microsoft CSP.

<https://www.aparavi.com>

## Recording Insights for Microsoft Teams

Software developer ASC Technologies AG has launched a native app integrated into Microsoft Teams that allows users to record and archive one-to-one PSTN-to-Teams calls and Microsoft Calling Plan calls as well as online meetings, video and chat to fully meet compliance requirements.

ASC Recording Insights uses Microsoft Azure Cognitive Services to automatically transcribe all recorded communication, translates this into multiple languages and analyse the results to find key metadata and identify compliance risks.

ASC, with its native app ASC Recording Insights, is one of the first vendors to take part in the Microsoft Teams Compliance Recording certification program. The program is designed to offer Microsoft customers confidence that participating solutions not only meet all market requirements but also provide a high-quality experience and compatibility.

The solution offers:

- Secure recording and archiving of the entire communication in Microsoft Teams including voice (internal and external calls), online meetings, video, and chat
- Compliance functionalities to meet compliance requirements such as tenant-specific encryption of data, access rights management
- Recording control to start, stop, pause, delete and mute the recording
- Transcription, translation, keyword spotting, emotion detection with Azure Cognitive Services such as Speech Services, Text Analytics, and Natural Language Understanding
- Native app in Teams integrated directly into the user interface of Teams (changing to external systems is not required)

[https://asctechnologies.com/english/ASC\\_Recording\\_Insights\\_Compliance\\_Recording\\_for\\_Microsoft\\_Teams.html](https://asctechnologies.com/english/ASC_Recording_Insights_Compliance_Recording_for_Microsoft_Teams.html)

## AI tool for labelling unstructured data

AI developer Clarifai claims to have developed a new way of labelling unstructured image, video and text data. Clarifai has built one integrated tool for managing data annotation projects of any size in its end-to-end AI platform. Clarifai Labeler seamlessly integrates within Clarifai's platform so that users can manage the whole AI lifecycle in one place: labelling datasets, searching data using AI, training AI models and auto-scaling models in production.

For enterprises looking for additional help increasing productivity, Clarifai now offers a fully managed data labelling service (<https://www.clarifai.com/services/data-labeling>). Expert annotators, assisted by AI-automated tools, help companies reduce the complexities of managing labelling workforces. The new service greatly accelerates the time-to-value from AI.

Clarifai's end-to-end platform for the AI lifecycle streamlines the model building process from data ingestion to model creation, all the way through to model deployment. Clarifai Labeler offers AI-assisted automation to prefill labels and speed up project completion. Using task management features designed for large human-in-the loop workforces, it's seamless to assign labelling tasks to a distributed group and gain transparency into annotators' work.

With these new advancements, Clarifai customers can use AI to make labelling data an order of magnitude faster than the traditional technologies out there. By augmenting human workforces with AI model recommendations, enterprises can reclaim their data scientists' time and productivity while letting labellers accelerate the repetitive task of annotating data.

<https://www.clarifai.com/label>

## Cloudian Storage Launches in ANZ

Object Storage Specialist Cloudian has launched its operations in Australia and New Zealand, led locally by Australian industry veterans James Wright and Jason Mantell - both with prior experience at Nutanix and Pure Storage

Founded in 2011 by CEO Michael Tso - who attended high school in Melbourne - Cloudian's HyperStore solution enables enterprises to store, find and protect object and file data seamlessly across sites, both on-premises and in public clouds, within a single, unified platform. The company has a strong network of partnerships with some of the largest cloud and technology companies, including Cisco, HPE, Lenovo, Rubrik, Veeam and VMware.

Cloudian aims to bolster its local team and partner network in the region and has already signed distribution agreements with Exclusive Networks and NEXTGEN.

<https://cloudian.com/>

## Colligo Content Manager for M365

Colligo has been acquired by a private equity investor Olbia Software, which is led by CEO Tim Brady (and who will lead Colligo moving forward).

The company has also announced a new solution, Colligo Content Manager for Microsoft 365, allowing knowledge workers to stay in Outlook to explore and manage any SharePoint file.

Colligo Content Manager is a natural tool to extend the capabilities of their existing Microsoft 365 Email Management and Document Management solutions.

Colligo Email Manager for Microsoft 365 and Colligo Document Manager for Microsoft 365 help workers to capture and tag files right from Office applications into SharePoint with sophisticated metadata and label classification tools.

Layering the Content Manager module on top, Colligo users can not only capture and share links to email or document files, they can browse and view to any type of file at any SharePoint location from within Microsoft 365.

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

## DocsCorp adds new Enterprise Software

DocsCorp has announced the release of compareDocs Enterprise, a new edition to its document comparison software, compareDocs. This first version includes a new 3-Pane View Comparison Report type, making it easier for users to review the comparison report and the source documents on the same screen at the same time.

The 3-Pane View outputs the report to a Microsoft Word document rather than to a proprietary viewer, making it easier and more efficient to accept or reject changes.

The new 3-Pane View enables users to see the Original and Modified documents and the Comparison Report on-screen at the same time. The pane showing the Original and Modified documents can be docked in different locations on one screen or moved to a second monitor for easier viewing. Users can accept, reject, or rewrite changes within the interactive Comparison Report.

compareDocs is the second application in the DocsCorp document productivity suite to have an Enterprise edition. pdfDocs Enterprise, which includes pdfDocs binder for document bundling, is widely used among professional services industries including Legal, Financial, and Accounting.

A cleanDocs Enterprise edition is also scheduled for late 2020. The expansion of the DocsCorp Enterprise suite will benefit any organization that wants to streamline its core document applications, improve productivity, and reduce complexity.

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

## HelloSign workflow arrives in Australia

Dropbox has announced a set of updates to bring its eSignature solution HelloSign closer to Australian and New Zealand users. This includes making HelloSign available to all Dropbox users, giving them the ability to electronically sign and share documents straight from Dropbox and to store these documents within Australia.

The announcement follows the investment Dropbox made in June 2019 to establish a local hosting environment within the AWS Sydney Region. Now HelloSign customers will also have the option to store completed documents in Australia. This feature is available on the HelloSign Enterprise Plus and HelloSign API Platinum plans.

In addition to data residency, HelloSign is now available to all Dropbox users from within Dropbox. Embedding HelloSign as a native feature within Dropbox enables users to send, sign, and store their most important documents in one place, without leaving Dropbox. Once completed, the signed copy automatically saves back to Dropbox—combining several disparate workflows into one.

[www.hellosign.com](http://www.hellosign.com)

## Ephesoft Releases new version of Transact

A new release of Ephesoft Transact 2020.1.02 offers cloud hosting on Amazon Web Services (AWS) for secure deployment in as little as 24 hours; handprint extraction, checkbox and signature detection for cloud and on-premises processing; and, the addition of Ephesoft Transact QuickScreen to seamlessly read and extract data from over 1,000 different types of global IDs.

Hosted in the Amazon Web Services cloud, the latest version of Transact Cloud include data import functionality from AWS S3 buckets; server performance monitoring; lower cost of ownership and capital expenditure; and accelerated feature deployment for continuous product updates.

Now available in the cloud, on-premises or as a hybrid solution, Transact QuickScreen offers out-of-the-box capabilities to read more than 1,000 types of IDs, such as driver's licenses, passports, visas, healthcare cards, international documents, tax forms and patient paperwork from 195 countries.

A user can capture an ID, form or document on any device such as a mobile phone or scanner, and upload it for automatic processing. The Transact platform classifies, extracts, validates and delivers the data into the customer's line of business systems such as RPA, ECM, EHR, CRM and ERP.

Research has shown a growing demand for expanded handprint recognition and identity verification solutions across many industries, including enterprise, financial, government and healthcare. Native Intelligent Character Recognition (ICR) and Optical Mark Recognition (OMR) extraction

is now available for on-premises, hybrid and cloud solutions, integrating directly into the Ephesoft Transact user interface alongside its traditional key-value extraction rules for OCR extraction.

This offers a quick and easy way for users to define an index field extraction rule to extract handprint values from a document, or to detect signature or checkbox filled areas. In some use cases, it took less than half the time to configure compared to traditional methods.

In the Ephesoft Transact platform, handprint data extraction rules are easily configured in most cases, with no templates or zonal page mapping required. In several customer scenarios, the solution's embedded ICR engine reduced professional service hours by converting handwritten data to machine-readable text and outputting textual data for review and validation by a human after the labour-intensive processing is complete.

Similarly, Transact Cloud easily interprets checkbox data without the need for template or fixed form projects where the characters representing the value are typed or filled in from a digital application. And, if forms contain signature fields, the system can identify those areas and determine whether or not the document has been signed.

[ephesoft.com/products/transact/](http://ephesoft.com/products/transact/)

## DySign delivers new eSignature Platform

Exela Technologies, Inc. has announced the launch of DrySign, a new proprietary eSignature platform. Following a successful closed-beta release to 3,000 users, DrySign is now available to the public.

DrySign is powered by Exela's digital signature technology, which allows users to securely exchange legally enforceable signatures from anywhere, at any time, with specifically targeted instructions.

The platform offers individual, multi-party, and hierarchical signature workflows, and facilitates remote document delivery, document archiving, and full process administration—no paper required.

Supplementing Exela's existing BPA offerings, DrySign is cloud-enabled and accessible from any internet-connected device. DrySign is designed to integrate seamlessly with other Exela and third-party applications through a robust API.

Available via a free trial and various subscription models, DrySign was created to save time and money for individual customers and businesses alike.

"DrySign represents another step in Exela's mission to assist consumers on their digital journey," said Sanjay Kulkarni, Chief Technology Officer, Exela Technologies.

"Our global expertise in creating industry and region-agnostic software and solutions can be experienced in the friendly and intuitive UI that's sure to improve the end-user experience."

<https://drysign.exelatech.com>

## FloQast adds Automated Reconciliations

FloQast, a provider of close management software created by accountants for accountants to close the books faster and more accurately, has announced the addition of new amortization reconciliation capabilities to FloQast AutoRec, an AI-powered solution to automate the highly manual and error-prone account reconciliation process. The new capabilities automatically calculate the monthly amortization, remaining balance, and full account reconciliation required for prepaid expense and simple deferred revenue accounts. Calculating monthly amortization has historically been a manual, time-consuming process. Accounting teams create reconciliations in Excel to calculate it, which is then manually recorded as a journal entry in the ERP system to determine the remaining balance of each item.

FloQast AutoRec's new amortization capability automates this process by calculating the monthly amortization amount and the remaining balance, then creating an Excel reconciliation to tie out to the general ledger balance. This saves accountants hours of mundane, manual work each month, allowing them to instead focus on other vital tasks.

[www.floqast.com/autorec](http://www.floqast.com/autorec)

## Hyland adds handwriting recognition

Hyland has announced Brainware Foundation, the latest release of its intelligent data extraction and text analytics software, featuring the addition of a handwriting recognition engine.

Brainware Foundation EP1 includes key enhancements to functionality, usability and security. Brainware users can now opt to leverage Microsoft's cloud OCR engine through Azure Computer Vision, an intelligent content analysis tool within the portfolio of Microsoft Azure Cognitive Services.

The Microsoft engine includes advanced OCR capabilities for extracting difficult handwritten inputs, in addition to machine-printed text. Extraction can be performed in a single pass on free-form printed or scripted writing without anchors, constraint boxes, colour dropout, or additional OCR/ICR engines.

■ The latest version of Brainware automatically moves runtime license files to a database. This improves supportability and scalability for solutions hosted in multi-server environments. Additionally, users can configure the location, size and storage time of log files.

■ Additional usability and security enhancements provide the ability to reclassify documents earlier in the document separation process, upgraded security and user access controls with TLS1.2, and password masking within solution configuration.

<https://www.hyland.com/en/platform/product-suite/brainware>

## Speedier Unstructured Data workloads



Hitachi Vantara, the digital infrastructure and solutions subsidiary of Hitachi, Ltd., has announced a new distributed file system and management solution that will users gain faster access to and insights from unstructured data such as emails, documents, health records, audio, video and images.

The new solution will be delivered through a partnership with WekaIO (Weka), a developer of high-performance, scalable file storage for data-intensive applications. The new OEM relationship with Weka will enhance Hitachi Vantara's portfolio with a high-performance, NVMe-native, parallel file system that the company will deliver tightly coupled to an HCP data store. This performant network-attached storage (NAS) solution will be well suited for use with artificial intelligence, machine learning and analytics applications across a broad array of industries.

The expansion of HCP also better supports next-generation unstructured workloads with performance-optimised all-flash HCP nodes. These new capabilities will deliver almost 3.4 times more throughput over Amazon's Simple Storage Service (S3) protocol, resulting in lowered costs of up to 34%.

Updated storage nodes also deliver an improvement of three times the read and write performance, while simultaneously enabling three times more capacity in the same rack space as the previous generation. This is especially significant as traditional NAS, primary workloads and cloud-native workloads are transitioning to object storage to meet high-performance requirements. The new HCP expansion helps customers translate data into business insights faster, increase revenue from data generated by unstructured data, and improve application performance to drive a better digital experience for end users.

## Automation for Remote Collaboration

FlowForma has launched a range of Remote Collaboration bundles to help companies rapidly digitize processes and minimize the impact of COVID-19.

**Enhanced employee collaboration** – a new FlowForma Teams App seamlessly integrates with Microsoft Teams for advanced document sharing, group decision-making, and ‘live’ process development. There is also the option to expand across other groups with FlowForma Collaborate.

**Improved stakeholder engagement** – get closer to customers, clients, and supply chain partners by giving them access to your forms through FlowForma Engage. Encourage stakeholders to seamlessly complete steps within your business processes via a unique and secure web link.

**Faster decision making** – use FlowForma Decision for public and private voting to make informed decisions while remote working. Authorized e-signatures and a fully traceable record ensure security and compliance.

FlowForma’s Remote Collaboration bundles feature a select set of COVID-19 themed process accelerators. These accelerators can be easily edited to suit each business’ own requirements as staff prepare to return to the workplace, including Pre-return to Work Forms, Employee Wellness Assessments, and a Contact Tracing Log. FlowForma is available for a 14-day free trial.

[www.flowforma.com](http://www.flowforma.com)

## Hyland Releases PII Compliance Solution

Hyland has launched a PII Compliance Solution. Using intelligent document redaction functionality the solution automates redaction processes to save financial institutions time, preserve accuracy and improve compliance with ever changing mortgage regulations and redaction requirements.

Leveraging the PII Compliance Solution lenders simplify redaction processes and add bulk document upload functionality in an agreeable format. With this tool, financial institutions can:

- Automatically redact personal identifying information
- Seamlessly upload large amounts of documents
- Ensure compliance with industry regulations

Using Optical Character Recognition (OCR) technology, the document redaction application automatically identifies and redacts sensitive information – eliminating manual work, and the potential for human error. Once redacted, the solution offers a flexible workflow to assist with document export – increasing efficiency and eliminating repetitive work.

Additionally, reporting capabilities deliver notifications with document processing times, phases and dates in which documents need sent and monitoring timeframes to ensure compliance throughout the document management lifecycle.

For more information about Hyland’s PII Compliance and lending solutions, visit [Hyland.com/FinancialServices](http://Hyland.com/FinancialServices) or view a [product demo here](#).

## iText launches iText pdfOCR

iText Group NV has announced the launch of iText pdfOCR, built on the Tesseract OCR engine. Tesseract supports over 100 languages and was originally developed by Hewlett-Packard (‘85), and was released under the Apache open source license in 2005. Since 2006, its development has been sponsored by Google.

iText pdfOCR, is part of the renowned iText 7 PDF SDK and offers Optical Character Recognition (OCR) functionality to convert printed text in scanned documents and images into a fully searchable PDF/A-3u compliant format (PDF version 1.7) and make accessing those texts easier and faster. Without machine-readable text, printed or scanned documents cannot be searched, indexed or interpreted. Logical follow-up actions could be data extraction with iText pdf2Data, secure content redaction with iText pdfSweep, or multilingual document recreation with iText pdfCalligraph. Repurposing data can be done with the low-code document generator iText DITO. The applications of iText pdfOCR are various: for instance, archiving of historical documents, translations of legal documents, automatic data entry while processing all sorts of physical applications or claims, and sorting of otherwise not editable printed or scanned documents.

[itextpdf.com/en/products/itext-7/pdfocr](http://itextpdf.com/en/products/itext-7/pdfocr)

## K2 adds new Process Automation platform

K2 has announced K2 Nexus, a new cloud-based intelligent process automation platform and a suite of solutions, to enable enterprises to transform their business operations. For most companies, operational processes are still very fragmented, manual and siloed across their organizations. Disconnected workflows and lack of visibility hinder businesses from meeting critical compliance requirements, making real-time business decisions and causing operational inefficiencies.

K2 Nexus helps companies remove silos of data by connecting and streamlining information flow across systems, and enabling organizations to quickly adapt to change.

“Process automation is currently experiencing a watershed moment, especially as companies look to accelerate their digital transformation initiatives,” said Burley Kawasaki, chief product officer at K2.

<https://www.k2.com/product>

## Kapish goTRIM Pro v3.04 is here!



goTRIM Pro v3.04 lets users access and work with Content Manager from any iOS or Android device. This release of goTRIM Pro v3.04 provides enhanced security and user experience features.

The Latest Kapish goTRIM Pro is now available on the Google Play Store and the Apple App Store for download. Enhancements include:

- a Content Manager administrator can now filter records returned by the application based on ‘Security Level’ from the GoTRIM Pro Configuration Site.
- Administrator users can now enable/disable Check-In/Out functionality from the GoTRIM Pro Configuration Site.
- The configured ‘Sort Order’ is now included in the connection hyperlink.
- Bug fixes: Records with restricted characters in their title will now render.

View full product documentation at the following links:

[goTRIM Pro v3.04 – Installation and Configuration Guide](#)

[goTRIM Pro v3.04 – Software Compatibility Matrix](#)

[goTRIM Pro v3.04 – Fixes and Enhancements Report](#)

[goTRIM Pro v3.04 – Specifications and Limitations](#)

Contact [sales@kapish.com.au](mailto:sales@kapish.com.au) to find out more

## Esker Supplier Management Solution

Esker has announced the launch of a new Supplier Management solution integrated in its Procure-to-Pay (P2P) automation suite. This new solution takes a full lifecycle approach to help businesses manage supplier information and automate processes across the supply chain.

Offering a 360-degree view of supplier information, the solution helps businesses effectively manage compliance, minimize risk, gain full process visibility

and reduce their P2P staff workload.

With the ability to collect information and legal documents directly from their vendors with supplier self-registration, companies can accelerate the new supplier process and start doing business faster.

Esker’s supplier management solution enables businesses to request only the right information needed, depending on the type of suppliers. With visibility into all supplier activities (e.g., new vendor registration, validation, documented audit trail, etc.), businesses can ensure that decision making is data-based and reminders can automatically be sent to suppliers to update their information.

It protects businesses by verifying that all supplier information is correct (e.g., bank details, VAT number, DUNS Number, W9, insurance certificates, diversity questionnaire, code of conduct, etc.), and ensures that financial and compliance regulations are met.

Additionally, Esker leverages third-party data to monitor supplier risks. Businesses simply approve new suppliers, the same way they would a purchase requisition, without having to leave Esker’s interface or use another solution to manage the information.

[www.esker.com.au/](http://www.esker.com.au/)

## NetDocuments adds Enterprise Search

NetDocuments has introduced NetKnowledge powered by BA Insight to allow users to get the data they need in one search, instead of spending time looking in multiple places. NetKnowledge connects the enterprise search capabilities directly to the NetDocuments search APIs, eliminating the need to maintain a document index outside of the document management system (DMS).

NetKnowledge powered by BA Insight delivers the following benefits:

- Eliminate Downloading and Indexing Data for Search: No longer does content within NetDocuments need to be downloaded and indexed to be part of an organization’s enterprise search. Simply search within the NetDocuments platform, and NetKnowledge will find relevant data - along with information from other sources - and present it to users.
- Enforce Access Controls on Sensitive Information: Sensitive information may need to be restricted to certain individuals, but that data also needs to be available to others via enterprise search. NetKnowledge respects data restriction policies at the source and will only present data to individuals with proper access rights.

■ Manage Large and Disparate Data Sets Across the Organization: NetKnowledge helps organizations bring all its data together to form a single source of truth, so users do not have to perform multiple searches in different places to get the information they need.

<https://www.netdocuments.com>

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