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information & data manager

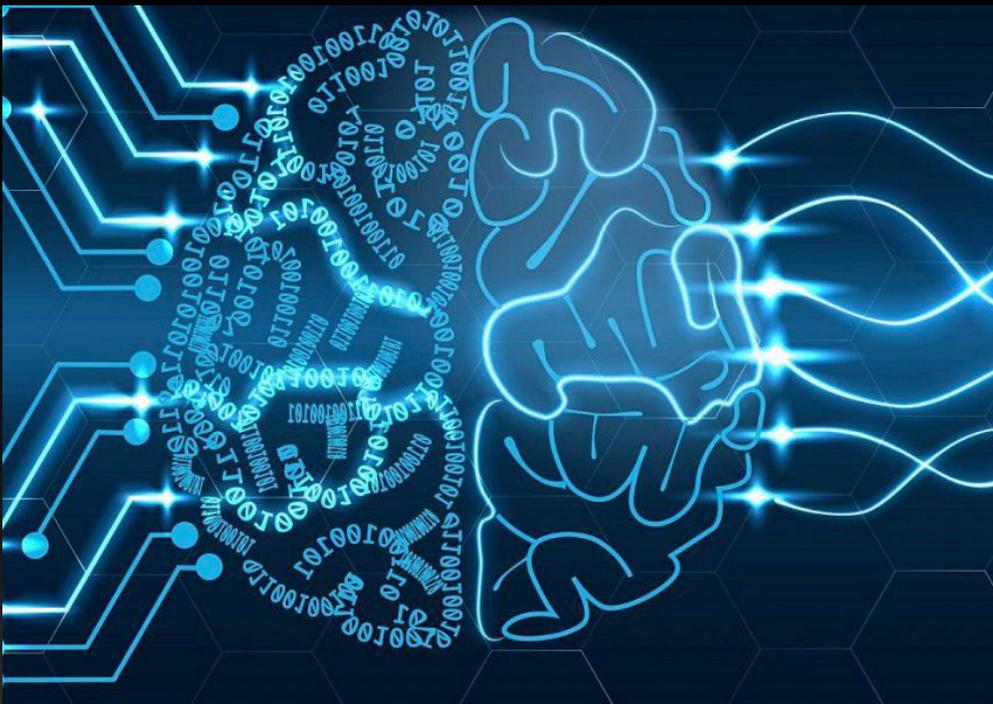
FEBRUARY-MARCH 2021

IN PROFILE:
DOCSCORP CEO
& CO-FOUNDER
DEAN SAPPEY



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STEPS TO INCLUDE
IN DIGITAL
TRANSFORMATION
PLANNING



Understanding Intelligent Document Processing

Are workplace communications tools spreading your data too thin?

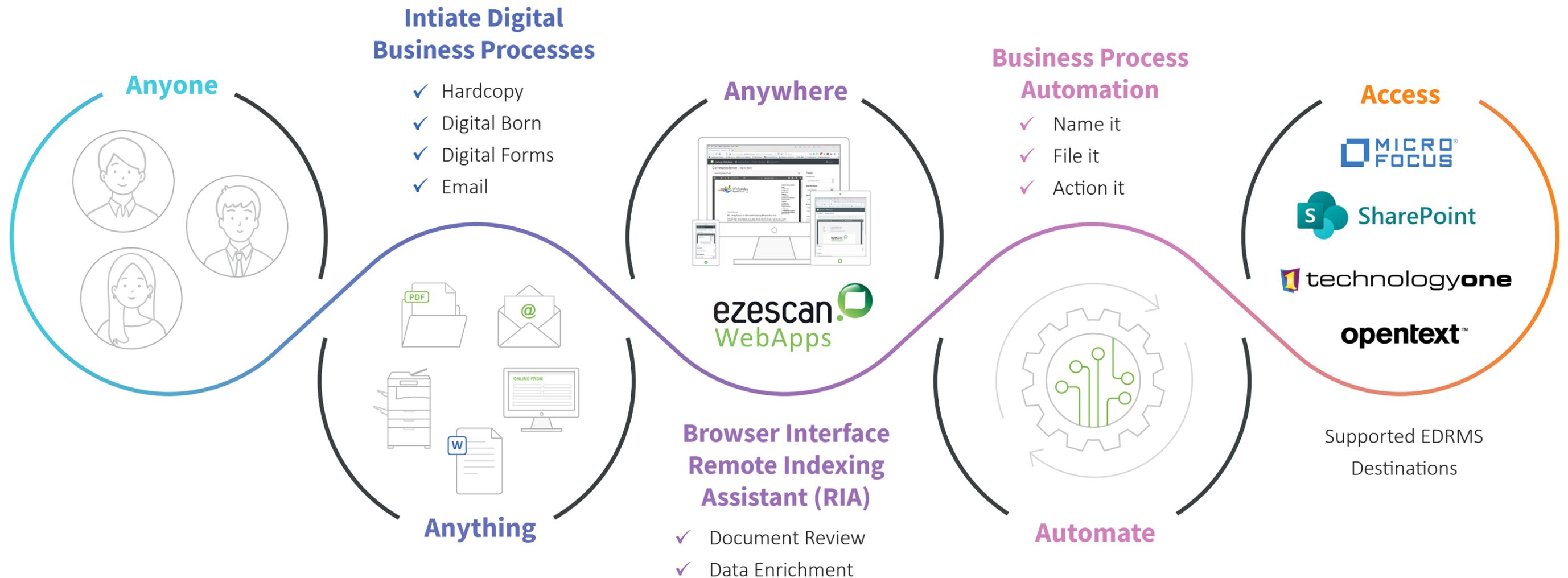
An Integrated Approach to Information Governance

[REVIEW]
Kodak alaris
S3100f scanner

Tape still leads the
way for backup and
archive

EncompaaS
Boosts Global
Profile

A new approach to records capture



Automatically align information capture with
your business processes

DocsCorp doubles down on output with Docuble acquisition

Australia's DocsCorp has expanded its document output management capabilities with the acquisition of [Docuble](#), a UK-based software company that specializes in solutions for document styling, repair, numbering, and print management. The deal will see its products rolled into the DocsCorp suite.

Building on its history developing solutions for PDF editing and collaboration, DocsCorp launched into document production and assembly with the July 2020 acquisition of [Verowave Technologies](#).

The addition of Docuble's products to the DocsCorp platform will enable document professionals at professional service firms globally to create, compare, review, and distribute documents more efficiently and securely. It also eliminates the complexity and expense of managing and working with multiple vendors.

Sarah Hanfrey, Docuble Founder and Managing Director, said, "We have always approached our product development by really listening to our clients and striving for excellence in design. We are delighted that DocsCorp sees the value we have achieved so far. We are excited that as part of the DocsCorp team, we will be taking the products to a wider market."

"We are delighted to announce the acquisition and welcome the Docuble staff and customers into the DocsCorp fold," said Dean Sappey, DocsCorp President and Co-Founder.

"They provide us with the very best in terms of technology and will help our clients realize their "one partner, multiple solutions" vision. Combining our respective capabilities in an integrated application platform will ensure we are an integral part of the document production, review, and distribution process in law firms around the world."

The addition of Docuble means the DocsCorp document productivity platform now delivers a wide range of capabilities: template management, document

assembly, document styling and repair, numbering, document comparison, PDF editing, metadata cleaning, email recipient checking, print management, document bundling, and bulk OCR processing.

Sarah Hanfrey will join DocsCorp and continue to lead the development of the Docuble products. Tim Suiter will join as Product Manager, responsible for the Docuble solutions and template management.

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

Objective ECM gets NZ Government tick

Objective's Enterprise Content Management software suite (Objective ECM) has been recently listed under Pae Hokohoko Marketplace, New Zealand's AoG ICT panel under Content Services Software - Tier 2 in the Public Cloud Service SaaS Catalogue.

Objective ECM now joins other Objective software products on the panel, including Objective Connect and Objective RegWorks solutions.

"This is fantastic news for government agencies who are seeking a modern document and records management platform that promotes great information governance practices, excels in a wide number of use cases, and is compliant with all NZ government standards and legislative acts pertaining to information and records management," remarked Cameron Thornton, Solution Director - Information Governance at Objective.

NZ Agencies are encouraged from the Government Chief Digital Officer (GCDO) and the Government Chief Information Security Officer (GCISO) to purchase from the ICT Common Capability Panel. This guidance applies to public service departments, district health boards (DHBs) and some crown entities.

In order to achieve Tier 2, suppliers have to provide detailed information which is reviewed and confirmed appropriate by the GCDO before the endorsement is issued. Objective is one of only a few approved suppliers for Content Services that has a Tier 2 security rating. With the inclusion of Objective ECM, Objective has been selected to provide software offerings in 8 categories.

Relativity boosts Australian profile



Georgia Foster, Relativity Managing Director, APAC

Relativity, a global legal and compliance technology company, is strengthening its investment in the Australian market. RelativityOne data in Australia has more than doubled in the last year, demonstrating an increased desire for an e-discovery SaaS product the company says.

Relativity has hired Georgia Foster, Managing Director, APAC, to lead the organisation's efforts in the region. Foster has more than 17 years of experience leading lead sales, operations, product and marketing teams in APAC, the U.S. and Latin America. She previously held roles at LinkedIn and Uber, bringing their products and concepts to the local market.

Relativity introduced a preview program enabling some Australian customers to provide realtime feedback allowing for iteration on the functionality prior to its release.

The latest release for RelativityOne users in Australia offers:

Level Numbering to eliminate the need for multiple processing platforms.

■ Improved PDF Rendering and Viewer so there's no more importing/exporting.

■ Improved PDF Redaction Workflow to apply redactions from within RelativityOne.

■ Updated options in Relativity Desktop Client (RDC) to export rendered PDFs.

"Our goal is for e-discovery teams to have a true end-to-end e-discovery platform in RelativityOne," said Stuart Hall, Senior Manager, APAC Service Delivery at Relativity.

Georgia Foster "This is the first time that we collaborated so closely with Australian customers on a locally focused product upgrade and the approach certainly benefited both Relativity and our customers."

<https://www.relativity.com>

RecordPoint grows local product team

RecordPoint, creator of the information governance SaaS Records365, has announced recent hires for Sales Director, APAC and VP of Product.

With a combined 40 years of experience, Kris Brown joins RecordPoint as VP of Product, and Jesse Edwards joins as Sales Director. Both have worked with some well-known brands in the sector, including TOWER Software, Hewlett Packard, and TechnologyOne.

"The progression of organizations to SaaS solutions has changed the traditional documents view of compliance," said Brown.

"RecordPoint is uniquely positioned to manage this next wave of data growth, utilizing machine learning and artificial intelligence to apply compliance to platforms like Office 365, Teams, and SharePoint Online, which are just the start of an ever-expanding information management landscape."

Edwards explains that "joining the RecordPoint team was an easy decision as they are the market leader in machine learning and auto-classification. The ability to manage content in-place is a 'game changer' and it's what customers have come to expect."

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

ZircoDATA adds NSW Acquisition and CEO

ZircoDATA has confirmed its seventh acquisition to date. In a deal finalised January 13, ZircoDATA acquired Ultimo Document Storage Centre located in Alexandria, NSW.

Additionally, officially stepping into the role January 18th, Jacqueline Fitzpatrick was appointed as ZircoDATA's new Chief Executive Officer (CEO).

Fitzpatrick has previously held leadership positions with global security giants G+D Mobile Security and IDEMIA.

In conjunction, Tim Lyons was appointed as the Chief Revenue Officer (CRO) overseeing the sales, customer and account management and marketing functions of the company reporting to the CEO.

Upsol teams with Brother NZ

UpSol NZ has announced a new strategic partnership with leading print distributor, Brother International (NZ).

UpSol will support Brother with digital transformation and business process re-engineering solutions, meaning Brother Managed Print Service customers can now also access Accounts Payable, Contract Management, Human Resources, Document Workflow and Business Process Outsourcing Solutions.

"The relationship between UpSol and Brother makes good strategic sense," said Kristin Harper, General Manager, UpSol.

"Both companies offer complimentary products and a number of the key members of each team have worked together successfully before over a number of years."

<https://upsol.co.nz/>



Publisher/Editor: Bill Dawes

email: bill@idm.net.au

Web Development & Maintenance: Cordelta

Advertising Phone: 02 90432943

Email: idm@idm.net.au

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Are workplace communications tools spreading your data too thin?

By James Simpson, SafetyCulture

The landscape of data management and office software is rapidly shifting as the pandemic transforms the way teams work. One thing remains certain: workplace communications need to be both secure and in-sync.

When WhatsApp announced modifications to its privacy policy, it sparked an exodus from the platform and ignited fresh concerns about big tech whittling away user privacy. The news was a wake-up call, and companies that were sleeping on the risks of using consumer software for business purposes are now wide awake. While it may be simple to adopt, consumer software isn't built for business use. End-to-end encryption protects data in transit but there are vulnerabilities when technology isn't designed with the workplace in mind.

Diminished privacy is not the only operational risk at play. When teams work across several platforms, data is spread too thin — leaving valuable information at the whim of multiple company policies and leaking potential insights in the process.

In today's distributed workplace, digital collaboration platforms are information-rich and data-intensive. This data is essential to drive decision making and predictive analytics. IT Managers strive to capture most, if not all, of the knowledge elements serving business stakeholders. Yet, the very same 'always on' digital workplace can pose a challenge to this.

Research by Statista shows that workplaces communicate across 3.56 different platforms on average. With a variety of formal and informal tools at their fingertips, software sampling can become commonplace in an enterprise - using one app for team-planning, one for messaging and another to track projects and workflows.

A reliance on multiple channels means that a workplace runs the risk of leaving information calcified across different programs. In the short term, these knowledge silos make data management unnecessarily complex. Over time, it reduces visibility and the power to improve operational efficiency using analysis.

There is also the issue of process. To achieve their best, people need time and space to focus on the work that matters most. Sending and receiving information through multiple channels creates a lot of noise. The larger and more complex the workplace, the louder the noise. Important messages are drowned out and workflows are hampered. And as businesses become more collaborative, streamlining workflows is more important than ever to ensure productivity.

Keep your data where the work happens

Most enterprises have workplace-sanctioned collaboration software such as Office 365 or Microsoft Teams. This software is designed with controls and features that make these offerings suitable for workplace collaboration — including different administrative, encryption and integration levers.

Sometimes, an organisation may need more. Whether it's optimising for communication, collaboration or innovation, data capture will be a deciding factor.

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Consider your current digital workflows - what information is required for effective work? Actionable data is of high priority in a digital workplace, especially when frontline workers are involved.

Look at the mode of delivery - is it purely on desktop, or increasingly via mobile? Is the organisation in need of interactive timelines, archiving solutions, workflow management or even corrective action plans?

Perhaps it may be a combination of the above. If that's the case, a digital operations management platform may be better suited. Digital operations management platforms allow IT Managers to approach their technology solutions holistically. It provides all the essential tools for communication and workflow management in a single space, while maintaining a balance between customer privacy and operational risk. Instead of being designed to be sticky, they're designed for efficient workflows.

Designed to drive enterprise action

Streamlined digital workflows are the foundation of effective organisations. We see this daily in our work, for example with BOS Solutions, a liquid solids separation enterprise. With a large dispersed workforce and data silos, BOS lacked visibility into safety and quality statistics. Managers experienced difficulties reporting on compliance.

With SafetyCulture, they found a way to centralise all data in a dynamic hub. Actionable communications were baked into the system, so employees could close the process loop. Bottlenecks were eliminated and transparency improved by tracking corrective and preventative actions all the way to completion.

A digital operations management platform functions as more than just a single communication channel - it allows you to identify and track actions across multiple workflows. Our experience driving safety and quality across industry sectors has given us insight into what functionalities benefit digital workflows at scale.

A considered digital workflow has a clear structure, cross-functional processes and user-centred design. In particular, features like messaging, task logs and record of completion tie communications to tangible outcomes, resulting in more valuable data capture.

The pace of innovation is only increasing. The digital workplace has arrived, and even as workers slowly return to the office, distributed teams and workflows are here to stay. Global technology trends, such as the adoption of digital operations management platforms, will become a bigger part of digital workplace transformation.

IT Managers will facilitate this shift. Niche external programs were once a useful stopgap in the rapid transition to online work. But in the future, technology that unites people and operations together on one coherent operations platform will improve collaboration, productivity and deliver long-term return on investment.

James Simpson is Vice President of Engineering at SafetyCulture. Its flagship products, iAuditor and EdApp enable teams to perform checks, train staff, report issues, capture data and communicate fluidly.

ELO ECM Suite

Digital processes for maximum flexibility

ELO
Digital Office



▶ YOUR WORK FLOWS

The new **ELO ECM Suite** has landed in Australia. For over 15 years, ELO Australia has provided companies and Government agencies of all sizes with a solution that increases compliance and improves business processes. The new **ELO ECM Suite** is the ideal way to digitalise your business today and in the future. With our **ELO ECM Suite**, you can better manage contracts, automate your accounts payable processes,

easily implement eSignatures and much more. The **ELO ECM Suite** actively supports your daily work wherever you are. Daily, more than 20,000 users in Australia benefit from ELO's Ease-of-Use, open architecture and modern user interface. Our Certified Business Partners are here to help you, making your business life easier, more compliant and just better. The Australian based teams are there for you. www.elo.com

grace:
Always more.

nexttechgroup

envision
DIGITAL

SAU DIGITAL

PSQ
PEOPLE | SERVICE | QUALITY

TOSHIBA

EncompaaS Boosts Global Profile

EncompaaS, global provider of a cloud-based compliance platform automating governance of on-premises, cloud and application information repositories, has announced the appointment of experienced U.S.-based information management and governance executive, David Gould as Chief Customer Officer.

Gould has over 10 years' experience as a senior executive in the information management and governance market across North America, EMEA and the Asia Pacific. He is recognised as an industry thought leader and senior domain expert in advanced, next generation information governance products and corporate programs.

Gould has worked for the last eleven years at HP, HPE and Micro Focus, where he was responsible for the Secure Content Management business built on Content Manager, previously known as TRIM.

Based in San Francisco, Gould becomes a senior member of EncompaaS's executive team led by Australian-based founder and Chief Executive Officer, Jesse Todd.

With them, he is responsible for realising the company's global vision to automatically manage enterprise content, applying rules and policies behind the scenes, so users can use whatever application is best suited to their roles.

As Chief Customer Officer, Gould will work closely with EncompaaS clients to help them accelerate digital transformation for compliance, privacy and team productivity. His appointment is a key element in EncompaaS's global growth strategy, boosting the company's presence in the important U.S. market, and strengthening the ability to engage with major global clients.

"My goal at EncompaaS is to leverage my ability to create strong, binding customer relationships based on innovation, market commitment and expertise," said Gould.

"It is exciting to join an organisation at the forefront of next generation content services that I have admired from afar as a partner. Now I have the opportunity to be on the inside and help lead a very dynamic team with a true passion for great customer outcomes."

CEO Jesse Todd welcomed Gould to the EncompaaS executive team.

"David has an excellent reputation as a thought leader in the information governance sector worldwide, as well as a strong track record of articulating strategically important enterprise information governance solutions across a wide variety of industry sectors," said Todd.

"Couple this with his long-standing relationship with myself and a number of other EncompaaS staff, and it made perfect sense for David to come on board as part of our global growth plans."

EncompaaS's innovative cloud platform drives enhanced manage-in-place compliance capabilities across the enterprise. By leveraging artificial intelligence, machine learning and automation, EncompaaS discovers, analyses, enriches, manages, and disposes of content according to policy – delivering

seamless governance and greater productivity, while fast tracking digital transformation initiatives.

Customers benefit from real-time analysis, management, and visualisation of their enterprise data holdings, presented via an intuitive and responsive management dashboard. With EncompaaS, organisations can rapidly configure the platform to identify and manage in-place content found in Microsoft Teams, One Drive, SharePoint Online, Share Drives, and other information repositories. Enterprise data is completely and transparently transformed into a valuable asset that is easy to manage and leverage in a compliant and safe manner, regardless of location, creation method or use case.



David Gould, Chief Customer Officer, EncompaaS

EncompaaS's cloud-based compliance platform delivers intelligent, automated governance across all of an organisation's on-premises content repositories, cloud repositories and cloud application services.

EncompaaS automatically manages enterprise content, applying rules and policies behind the scenes, so users can use whatever application is best suited to their roles.

By analysing information within content repositories with machine learning and AI, EncompaaS visualises content patterns and themes to understand its significance.

With these insights, organisations can manage enterprise content compliantly, migrate it to new digital platforms, and retire it in accordance with legislation and corporate policy. EncompaaS's international team specialise in regulated sectors, including government, financial services, and pharmaceuticals.

EncompaaS has been approved by Microsoft to run on Azure and is available in [AppSource](#), the [Azure Marketplace](#) and through specialist provider [Information](#). For more information, visit <https://encompaaS.cloud/>.



EncompaaS

Makes your digital workspace compliant

EncompaaS:



- Delivers manage in place compliance across M365 including Teams and SharePoint Online
- Connects Content Manager to Teams, SharePoint Online and on-premises repositories such as file shares, moving content smoothly and compliantly between them.
- Discovers, analyses and manages content in place on File Shares and can safely migrate content to the cloud.
- Provides a single interface to manage content, and compliance across enterprise systems and repositories

EncompaaS ticks all the boxes and is certified to ISO/IEC 27001:2013.



A partner you can trust

INFORMATION is an innovative professional services organisation specialising in the design and implementation of modern information management, collaboration and governance systems for the digital workplace.

Our expert and experienced team is passionate about helping you deliver your digital transformation objectives - we have been helping our clients for 20+ years.

Let INFORMATION show you how EncompaaS seamlessly integrates with Content Manager to expand your compliance capability. We can help you safely adopt cloud services and close out risk across your organisation

Reach us at 1300 474 288 or via info@information.com.au

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What common document problems can template management software resolve?

By Caitlin Burns, DocsCorp Content Manager

For law firms and other organizations that create an enormous number of documents, opening a blank Word file and typing is very inefficient. Staff would lose hours every day searching for details like a clients' address or the latest version of a set of terms and conditions.

Many firms have realized inefficient document creation was eating up precious time, so they adopted document templates.

Staff would create their document using a template that automatically pulls a lot of information from other systems, helping them to be more accurate and productive.

But document templates come with their own set of challenges. If an organization creates many different types of documents, it is likely to manage many templates.

Changing these templates manually is a time-consuming process. And, without centralized deployment, it is easy for staff to end up with different versions, leading to inconsistency across the business.

The most common document problems can be broken down to those encountered by a) end-users, and b) template management system administrators.

They are:

For end-users:

- Inconsistency in document content and styles
- Inefficient manual typing and/or copy-pasting
- Human error

For system admins:

- Having to manage dozens of different templates manually
- Needing to create multiple versions of each template for different offices

Template management software helps resolve each of these issues.

Inconsistency in document styles and content

Without centralized templates, it's easy to make a mistake or miss something. Working from templates helps users produce professional documents that are consistent across different departments and even other offices.

Adding content to templates is straightforward for users of template management software.

Insert it by answering a series of questions related



to your document, or by dragging content blocks from your organization's content library onto the page.

Our template management software, [veroDocs](#), offers a custom-built ribbon in Microsoft Office that has all your essential document production tools in one place.

It is easy to make changes to your document while you work and finalize the look and feel using the tools in this ribbon.

Complicated template management

Manually updating dozens of document templates is no small task. With template management software, administrators can create, change, and manage document templates without the need for coding, macros, or software engineers.

Templates can be quickly and easily deployed via Active Directory, ensuring everyone works from the most up-to-date version.

Administrators can create templates for each individual office, complete with their own logo, theme, and proofing language.

The user's location will be determined automatically, based on their Active Directory settings. Otherwise, when a user changes the office location from London to Milan, the template will change automatically.

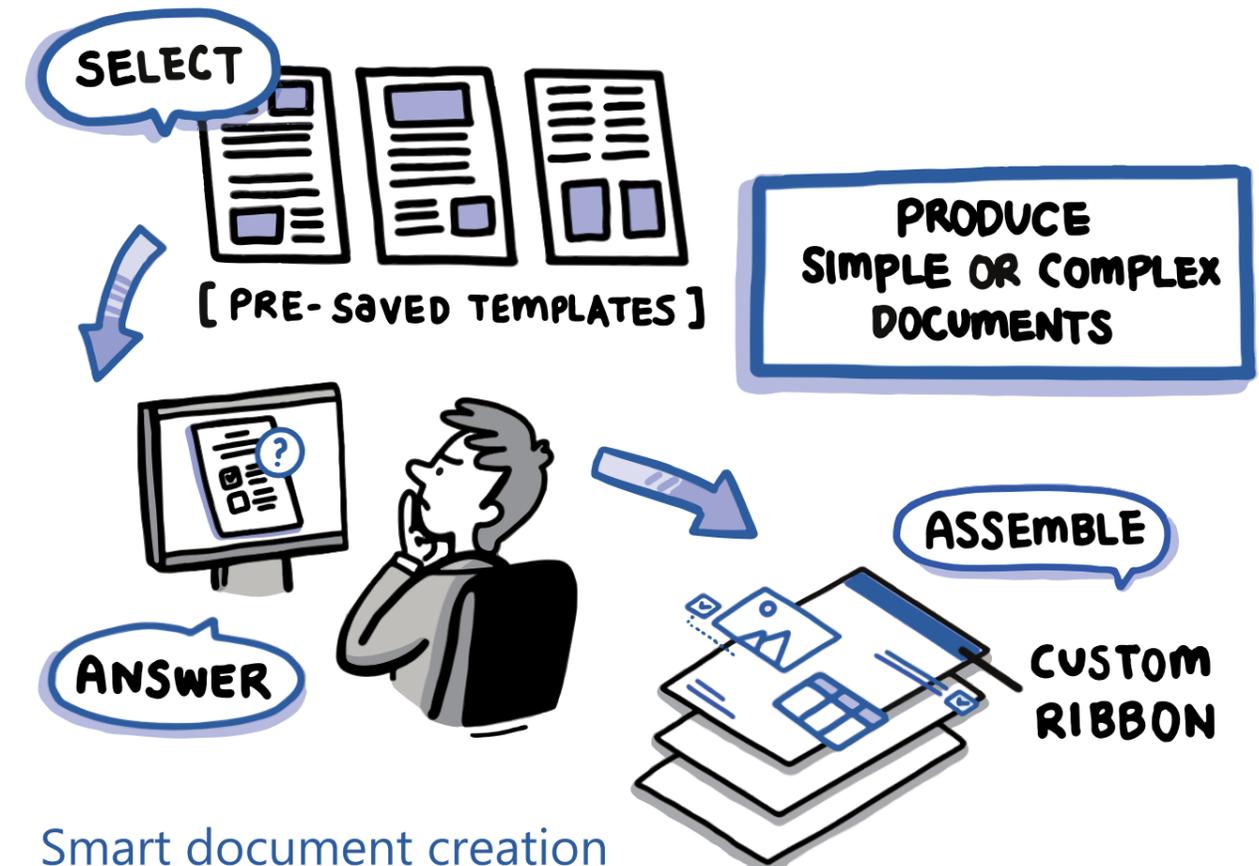
For organizations not yet using template management software, there are many efficiencies to be gained when it comes to document creation.

Working from templates helps users produce professional, consistent, and accurate documents quickly.

And template management software saves administrators time and helps them to ensure staff always have access to the latest authorized corporate templates.



Truly simple document creation.



Smart document creation

Create documents in less time

veroDocs streamlines document assembly with templates containing forms that prompt users to enter the right information for the document they want to create.

Ensure documents are consistent and professional

Without centralized templates, it's easy to make a mistake or miss something. Working from templates guarantees professionalism and consistency.

Easily manage and update templates

You don't need special technical skills to manage templates. veroDocs makes it easy to update and deploy templates to the people who need them.

Remote workers can access templates offline

More and more, people are working between their home and the office. veroDocs runs locally and will work offline, allowing users to create documents whenever and wherever.

[LEARN MORE](#)

docscorp.com/veroDocs



Work Smart

Six steps to include in digital transformation planning

In light of the rapid shift to digital ways of working, organisations must quickly ramp up their digital transformation efforts. Richard Graham, an Associate Director at Coeus Consulting, shares six steps to include in the planning phase of digital transformation initiatives.

1. Strategically review the business models

Businesses may need to review their focus and adapt business models accordingly to determine what makes sense in the short, medium and long term. Pivots and sacrifices are already occurring, for example in hospitality and travel and leisure, where the impact of Covid-19 will be felt longest and hardest.

This review should be led by establishing opportunities and expectations of both colleagues and customers.

2. Understand and optimise the customer and employee journeys

There may well be a changed priority landscape of the value driving journeys, and those which were low on the list for digitalisation will have renewed focus.

For example, fashion retailers are focusing much effort on using VR and AR to allow customers to virtually try on outfits at home, both improving the customer experience and reducing returns.

3. Assess business capabilities and processes

Fundamentally, many businesses are likely to have the right capabilities, however a review of how fit for purpose these are is advisable in order to meet the new normal. There are also industries that now need to do things digitally for the first time, and this will undoubtedly require a step back and review of the business capabilities that are most important.

The above changes will result in a host of process and organisational changes that meet the change in needs from the market, from customer, and from colleagues.

4. Align the data management strategy

Data practices are at the core of any digital transformation. However, once a roadmap of customer or colleague process changes are becoming clear, it's vital that supporting data assets are fully reviewed and considered.

This should include a strategy to uplift quality, security and all the other elements around them as required. Many digital transformations fail because the work needed around data is not given due consideration early in the journey.



5. Focus on the right supporting technologies

Technology is at the forefront of enabling the changes required. The need for investment now has probably never been greater and there is no hiding place for digitally lagging businesses. Perhaps the value that investment can bring is now clearer for many boardrooms.

SaaS and cloud platform providers are likely to see an uptick in business as the flexibility and speed to implementation that they offer meets a growing digital demand.

Companies will be reviewing the capabilities and value offered from their end user devices and networks in the light of the move to home working. RPA providers are also likely to see areas where they can help to automate legacy processes as an interim step.

Data should be at the top of the priority list, as the corner stone to effectively automating any process.

6. Don't overlook culture

Culture has always been at the heart of delivering successful digital transformation. In the most general terms, this means organisational agility: the ability to collaborate, accept change, accept risk, and embrace different ways to deliver that potentially haven't changed in a long time.

However, now this must be taken in combination with a much wider societal shift brought about by Covid-19.

It may well be that the human focus and collective experience of the pandemic helps to foster fertile conditions for transformation, and companies that are able to capitalise on this will gain a boost to their transformation efforts.

Originally published at <https://www.consultancy.uk/news/26029/six-steps-to-include-in-digital-transformation-planning>

Rio Tinto consolidates Data with Palantir



Palantir Technologies has signed a multi-year enterprise agreement for its Foundry Platform with Rio Tinto, one of the world's leading mining and metals corporations.

Palantir's software will integrate raw data from a multitude of disparate sources into a representation of critical mining operations. Rio Tinto will be able to make decisions and take actions using a single source of truth that combines operational and transactional data. This data resource will be available, with the necessary security and privacy controls, to its frontline and office-based workers.

"This partnership is an important step in our digital transformation; enabling fast-paced, forward-looking decision making across our operations leading to improved results in safety, cost and production," says Fay Cranmer, Rio Tinto's CIO. "We are excited to work with Palantir in the collaborative delivery of digital products, with best-in-class data technology."

The new multi-year partnership with Rio Tinto builds on a number of successful data integration projects explored last year across various business units including: transforming Borates to a digital business across the value chain; connecting people with data in Rio Tinto's underground operations; and assisting the company with the safety and well-being of its employees during the COVID-19 pandemic.

"This is a significant industry partnership for us", says Shyam Sankar, COO of Palantir. "Our Foundry Platform has been used extensively to accelerate delivery and optimise value chains across a number of market sectors where safety matters."

www.palantir.com

iText signs on with Singapore ID Program

iText has been named as one of the 8 technology partners recommended by GovTech (Singapore) for a National Digital Identity (NDI) initiative. SingPass users can use the new "Sign with SingPass" feature to electronically sign contracts, agreements and other legal documentation.

This new feature will be progressively rolled out by the Government Technology Agency's wholly owned subsidiary, Assurity Trusted Solutions Pte Ltd (ATS), in collaboration with iText Software and 7 more partners: DocuSign,

Netrust, Adobe, OneSpan, Dedoco, Tessaract.io and Kofax.

Besides digitally signed PDFs, iText pdfHTML, generating images from PDFs with pdfRender, flattening dynamic forms with pdfXFA, or easy creation of PDFs based on templates using the low-code tool iText DITO.

As more businesses offer "Sign with SingPass", users can look forward to using digital signatures to complete transactions without the need to be physically present to sign PDF documents.

Today's SingPass has evolved to provide seamless and convenient access to over 1,000 digital services offered by some 250 government agencies and private organisations. There are now over 2.1 million users of the SingPass Mobile app since its launch.

Benedict Lee, Regional Manager, Asia Pacific for iText said, "Working together with GovTech, iText has developed an SDK and code examples to demonstrate the integration of an organisation's document workflow with the NDI Digital Signing Service to allow digital signing of PDF documents in high volumes.

"By using the (available for Java and .NET) to create and process ISO-, PDF documents, customers can interface with the SingPass Mobile app and utilise secure, digitally signed PDFs in a modern, digitalised document workflow, a necessity in automated document management. Ultimately, businesses can benefit from growing their business with the NDI SingPass digital signing integration."

[Learn more about Sign with SingPass](#)

IAG embeds AI to reduce claims times

IAG, Australia's largest general insurer, is using artificial intelligence (AI) to predict whether a motor vehicle is a total loss after a car accident, reducing insurance claims processing times from over three weeks to just a few days.

The technology, which combines AI with business process automation, has helped IAG achieve up to a two and a half week reduction in claims times for customers when their car has been written off in an accident, by removing the need for a vehicle to be towed to a repairer prior to being assessed as a total loss.

IAG Director of Analytics Hannah Sakai said predictive total loss, which was developed in-house, was created to help reduce the emotional impact of a car accident by providing customers with more clarity and certainty sooner in the claims experience.

"Our predictive total loss solution leverages machine learning to detect a potential total loss with more than 90% accuracy, using information provided by the customer when they make a claim on the phone with a consultant or online. The customer is notified of the potential total loss outcome via text message the following day, providing transparency upfront on the process and providing answers to commonly asked questions. "The predictive total loss model is one of many AI applications being developed by data scientists in IAG's AI Centre of Excellence. Using an internal team allows us to leverage our unique business knowledge to tailor the experience to our customers", Ms Sakai said.

The IAG AI Centre of Excellence plans to refine the model using customer photos of the vehicle damage and extending the methodology to predict motor claim liability to help automatically validate claims at the time of customer lodgement.



[CASE STUDY] A Winning Formula for combining AI with process automation

Deemed as one of the marvels of the 21st century, Artificial Intelligence (AI), is predicted to open a gateway of opportunities for new businesses. The reality is that smart companies are implementing AI in existing processes today to ensure they are well-positioned to deal with a threatening and hyper-competitive business landscape.

In 2019, growing Australian company Civium undertook a journey with solutions provider [Winning Formula](#) to deploy AI and robotic process automation (RPA) to deliver new levels of efficiency throughout the business, including in invoice processing, for its operations in Sydney, Melbourne, Brisbane and Canberra.

Since launching in Canberra, ACT in 2003, the Australian family-owned company has expanded from a successful Commercial and Residential Real Estate Agency to now also providing Residential and Commercial Property Management all down the east coast. As it grew to handle a growing volume of invoices, more than 150,000 per calendar year for thousands of properties under management, Civium found it was struggling with a legacy of manual processes in its financial operations.

There were individual approval processes for each state in Australia where Civium operates, which were further complicated by the need to incorporate external parties in the process. So, for instance a plumber submitting an invoice to repair a faulty tap in a kitchen at a block of flats would need to pass through a specified number of approvers in the Strata Body Corporate before reaching Civium for approval and payment.

Each invoice for a particular service needed to be identified as a particular General Ledger (GL) item and allocated to a specific property under management. This required 6-8 staff at an outsourced facility to perform manual matching by reading each line item on each invoice and interpreting which GL code it should be allocated to.

The vast majority of line items were plain text without any coding so traditional RPA tools would not have been able to automate this process as they cannot deal with unstructured data.

Another challenge was that GL items are different from one property under management to another. For instance, mowing the lawn could be allocated to 'Maintenance' GL for one building and 'Gardening' for another.

Civium had been managing with a custom-developed strata management solution but turned to Winning Formula in 2019 to develop a new way forward.

Civium CEO and founder Doug O'Mara said, "Being a reasonably small but innovative company, we had always invested in tech but never to the level we have over the last few years. This was the single largest investment our company has made in 20 years other than acquisitions.

"We had already embraced an OCR system for a number of years, which while on face value did a reasonable job it was in effect requiring us to do a number of QA checks that meant we lost a lot of the efficiencies we had been expecting.

"I understand we are the first company in Australia to have combined AI in this way with OCR and RPA for invoice processing, which is ground-breaking and testament to Winning Formula's capability in this area. Since we began in 2019 we have built out 35 digital processes that were previously done by individuals. The quality and accuracy of our accounting service in particular is now second to none."

The Winning Formula solution integrates ABBYY FlexiCapture with a range of Microsoft RPA, AI and workflow tools to provide complete end-to-end intelligent automation. After the invoice data (including line items) has been recognised by ABBYY FlexiCapture, the data is fed by robots to a purposely trained AI Natural Language Processing engine (utilising Microsoft NLP capabilities) to "understand" the plain text line items and "interpret" which GL code they should be allocated to.

Approval workflows are then initiated to gain required approvals from internal and external parties as per policies and regulations for each building and state. Digital approval workflows have been developed in Microsoft PowerAutomate.

Winning Formula describe themselves as "technology mixologists" tapping into best of breed Intelligent Automation platforms to build optimum solutions that are easy to maintain, deliver best possible ROI and a great experience to internal and external users.

Wassim Soliman, Managing Director - Winning Formula, said "Leveraging ABBYY's world-class capabilities in OCR/ICR/Doc Classification with Microsoft's strong Document Storage, Workflow and AI capabilities, together with streamlined processes, delivered a great, scalable solution for Civium."

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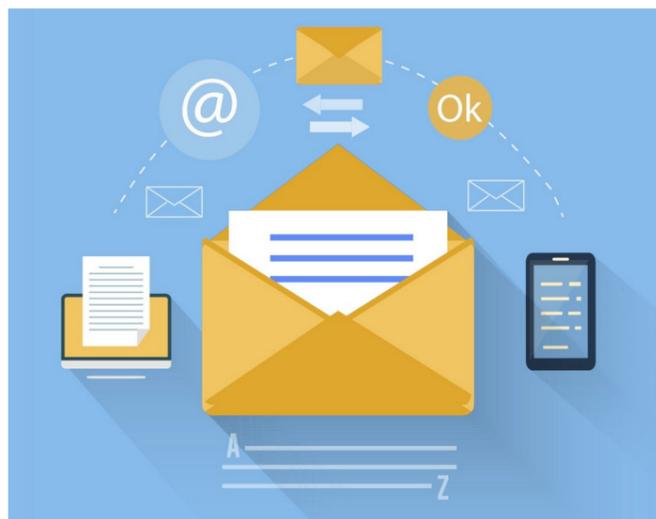
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Packaging email archives using PDF



Archiving email isn't easy or obvious. Commonly, solutions are vendor-specific and email clients are required; not an ideal solution for static records.

In 2019 the University of Illinois was awarded a grant by the Andrew W. Mellon Foundation to develop conversion criteria and requirements for archiving email into PDF containers. The final report, "A Specification for Using PDF to Package and Represent Email", is now available from the University of Illinois IDEALS Repository.

The report detailing the EA-PDF concept establishes high-level functional requirements for using ISO 32000 (PDF) technology as a model for packaging email for long-term preservation purposes. These requirements detail desirable functionality reflecting considerable input from stakeholders in digital preservation, government, education and industry communities.

PDF's ubiquity and acceptance, rich capabilities and open, well-documented specification is already supported by a global ecosystem of developers. PDF facilitates redaction, includes advanced digital signature technology, XMP metadata, semantic tagging, associated files, rich media, 3D and many other technologies that make it highly effective for many digital content archiving applications.

PDF's magic lies in its reliability and interoperability, so facilitating interoperability when using (and truly leveraging) PDF specifically for email archives turns out to be a reasonable application of the technology.

Conceptually, EA-PDF is no more complex than the underlying source email, but represents that complexity in a formally-defined manner, within the structures of the PDF container. MBOX, EML, and other formats are less well-defined formats than families of formats defined more by client implementations than by authoritative specifications.

PDF provides a means to represent these implementations in a normalized packaging model, regardless of the underlying source.

The EA-PDF concept integrates the capture of EML or MBOX content with PDF as a packaging, representation and distribution model for individual emails up to complete mailboxes.

Levelling the email archiving problem into the EA-PDF

framework makes "A Specification for Using PDF to Package and Represent Email" a thought-provoking take on leveraging the unique power of PDF to cut this Gordian knot.

Originally published at <https://www.pdfa.org/packaging-email-archives-using-pdf/>

Track your employees with AI and they will fight back: Gartner

Analyst firm Gartner, Inc. predicts that by 2023, more than one-in-ten workers will seek to trick artificial intelligence (AI) systems used to measure employee behaviour and productivity. Such systems have seen a significant uptick in use in the wake of the COVID-19 pandemic.

"Many businesses are making a permanent shift to full- or part-time remote work, which can be both costly and require cultural changes," said Whit Andrews, distinguished research vice president at Gartner.

"For management cultures that are accustomed to relying on direct observation of employee behaviour, remote work strengthens the mandate to digitally monitor worker activity, in some cases via AI.

"Just as we've seen with every technology aimed at restricting its users, workers will quickly discover the gaps in AI-based surveillance strategies. They may do so for a variety of reasons, such as in the interest of lower workloads, better pay or simply spite. Some may even see tricking AI-based monitoring tools as more of a game to be won than disrespecting a metric that management has a right to know."

Organisations are using AI-enabled systems to analyse worker behaviour in the same way that AI is used to understand shoppers, customers or members of the public. These tools provide basic activity logging with alerts, or in more sophisticated versions, can attempt to detect positive actions or misbehaviour through multivariable analysis.

Many employers use productivity monitoring systems despite a high percentage of workers finding such tools unappealing. Even prior to the pandemic, Gartner research showed that workers feared new technologies used to track and monitor work habits. As these tools become more prevalent, Gartner predicts that organisations will increasingly face workers who seek to evade and overwhelm them. Workers may seek out gaps where metrics do not capture activity, accountability is unclear, or the AI can be fooled by generating false or confusing data. Such activities have already been observed in digital-first organisations; for example, ride-share drivers sometimes work for two different services simultaneously as a way of maximising personal earnings.

"IT leaders who are considering deploying AI-enabled productivity monitoring tools should take a close look at the data sources, user experience design and the initial use case intended for these tools before investing," said Mr. Andrews.

"Determine whether the purpose and scope of data collection supports employees doing their best work. For those that do decide to invest, ensure that the technology is being implemented ethically by testing it against a key set of human-centric design principles."

New connections for smarter work

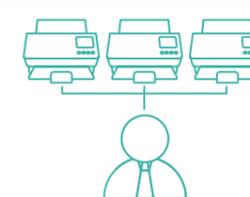
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CSIRO tool boosts safe data sharing

A new data privacy tool has been developed to help ensure key datasets – such as those tracking COVID-19 – can be publicly shared with an extra layer of security for sensitive personal information.

Developed as a collaboration between CSIRO's Data61, the digital specialist arm of Australia's national science agency, the NSW Government, the Australian Computer Society (ACS) and several other groups, the privacy tool assesses the risks to an individual's data within any dataset; allowing targeted and effective protection mechanisms to be put in place.

Traditionally, such assessments are undertaken by leading data and privacy experts who can now rely on computer models to validate this work.

Since 2020, CSIRO has explored ways of enhancing the tool in collaboration with the Cyber Security Cooperative Research Centre (CSCRC).

Known as Personal Information Factor (PIF) tool, the software uses a sophisticated data analytics algorithm to identify the risks that sensitive, de-identified and personal information within a dataset can be re-identified and matched to its owner.

The early version of the tool is already being used by the NSW Government to analyse datasets tracking the spread of COVID-19 in the state since March 2020 and apply appropriate levels of protection before this data is released as open data.

Dr Ian Oppermann is the NSW Government's Chief Data Scientist.

"There's no other piece of software like the PIF tool," Dr Oppermann said.

"It was developed through a long and very collaborative process involving many state, Commonwealth and industry colleagues. CSIRO's Data61 really brought it to life and made it useable.

"Every day, it helps us analyse the security and privacy risks of releasing de-identified datasets of people infected with COVID-19 in NSW and the testing cases for COVID-19, allowing us to minimise the re-identification risk before releasing to the public."

Dr Oppermann said COVID-19 had amplified public awareness of the need for data privacy.

"Given the very strong community interest in growing COVID-19 cases, we needed to release critical and timely information at a fine-grained level detailing when and where COVID-19 cases were identified," Dr Oppermann said.

"This also included information such as the likely cause of infection and, earlier in the pandemic, the

age range of people confirmed to be infected.

"We wanted the data to be as detailed and granular as possible, but we also needed to protect the privacy and identity of the individuals associated with those datasets."

Project lead researcher and Senior Research Scientist at CSIRO's Data61, Dr Sushmita Ruj, said new methods of data de-identification can provide enhanced levels of data privacy and ensure data involving personal information is protected.

"Having studied other privacy metrics, the team concluded a one-size-fits-all approach to estimating the re-identification risks of unique applications of data can be significantly improved upon," Dr Ruj said.

"The evolving approach to a PIF takes a tailored approach to each dataset by considering various attack scenarios used to de-identify information.

"The tool then assigns a PIF score to each set."

If the PIF is higher than a desired threshold, the program makes recommendations on how to design a more secure and safe framework to certify the dataset is safe to be publicly released.

The CSCRC's Research Director, Professor Helge Janicke, said privacy must be protected in balancing the need to share information.

"With PIF, you have a scale on which you can understand the risk, and that is something other tools don't provide," Professor Janicke said.

"Data analysis is well understood but how good the output is once shared is very difficult to understand.

"Hence, the metrics-based approach and analysis that underpins PIF is hugely valuable in achieving the ethical and responsible sharing of critical data, with this technology allowing data owners to fully assess the risks and residual impacts associated with data sharing."

The PIF tool is also being used to examine other data sets before public release in areas such as domestic violence data collected during the COVID-19 lockdown and public transport usage.

The tool will continue to be developed by CSIRO's Data61 and the CSCRC and is expected to be made available for wider public use by June 2022.

CSIRO would like to acknowledge and thank the Government of New South Wales and the Government of Western Australia and the Australian Computer Society (ACS) for providing datasets needed to test PIF and supporting the research, along with our partners in advancing the Cyber Security Cooperative Research Centre.

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[Case Study] Kennerley Childrens Homes



On the 7th of April 1869, The Hon. Alfred Kennerley, mayor and premier elect of Hobart (Tasmania) established Kennerley Boys Home and Industrial School. Alfred Kennerley was a community minded man who saw families' needs and he was committed to making a difference through education and assistance when they most needed it. The children and young boys that came to Kennerley did so at their parents' request, or when they became orphaned and had no one to care for them.

Times were tough and when families were struggling to provide for their children Kennerley Boys Home always helped out. The young men exiting Kennerley's care had trades, skills and were job ready knowing how important a good education was.

Today, more than 150 years later, Kennerley is still here because Tasmanian families still need help. Kennerley continues to be a vibrant contemporary private not-for-profit organisation run by a volunteer Board and by dedicated professional staff, foster carers and volunteers.

Over the many years ELO has supported various non-for-profit organisations as part of its Social Responsibility program. ELO, in partnership with its Tasmanian Business Partner, was introduced to Kennerley in 2019. Seeing the immense passion and dedication Kennerley had to helping the people of Tasmania, the ELO team knew the software would provide benefits, further improving Kennerley's impact on those who are in need.

Kennerley was facing issues with its electronic document storage systems, with the previous system having documents spread over 20 different PCs and servers. Out-of-date documents, duplicate files and more were all plaguing and hampering the crucial services that Kennerley Childrens Home provides.

In turn the previous system was not user friendly, which distracted social workers from their jobs and their charges. The act of working remotely itself was a highly complicated matter, where users had to take various bits of hardware with them, but even this



did not ensure that version control and compliance could be maintained.

Record-keeping challenges also existed due to the focus of social workers caring for their charges rather than devoting a lot of time dealing with their cumbersome legacy system.

The Aim

The aim of the project was simple. Provide an intuitive and easy to use records management system that allowed for proper version control, easy remote access and expand, not hinder, the critical work that Kennerley Childrens Homes was engaging in. While this aim started small, it soon grew in scope with the successful implementation of ELO. It now encompasses all aspects of document and record management at Kennerley. It has allowed staff unparalleled access to information no matter their location.

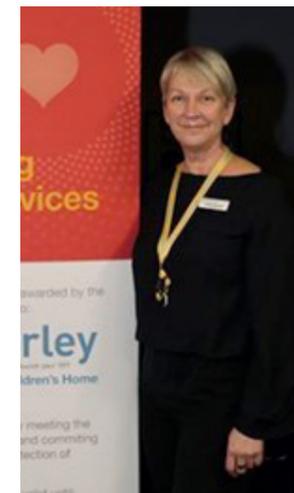
With the aim clearly in sight, ELO worked to provide a solution that would not only provide a software package, but tools to improve Kennerley's document, workflow and compliance challenges. The team from Kennerley and ELO were able to achieve a quick installation and deployment of the solution. Solving the core challenges has brought many different and additional perks to the organisation.

The ability to link documents and cases and also having full version control significantly improved and streamlined various processes. Being able to find accurate information quickly was very important, as people want to be able to access their records, and so finding this information smoothly has been very beneficial.

ELO's benefits to Kennerley became evident during our interview with Carol Baker, who coordinates information management. Carol is responsible for the records of nearly 100 current foster carers and nearly 120 children in Kennerley's care. Carol advised that: "ELO has allowed staff to continue to provide the highest level of support to children and foster carers; regulatory documentation (e.g. Police Checks) are not only easily accessible via a tablet when visiting a carer's home but also, this information is more secure as there is no longer a need for paper copies to be in circulation."

A great side-effect of introducing ELO is seen by reducing Kennerley's running costs such as reduced paper consumption. Carol Baker added that Kennerley has ordered significantly less paper due to ELO's capabilities of remote access and scanning. Carol said: "With ELO there is actually no need to

"I would and do recommend the ELO software, but also can recommend the company and the team to others and their organisations. Even those who are not techno savvy should try the product, as within no time, users were able to adapt to the software, and were already benefiting from it every day." - Andrea Sturges, General Manager, Kennerley Childrens Homes



print. You have all the information immediately and you can share it with a click of a button."

With the effectiveness of ELO clearly visible, there have also been several benefits that have improved the various teams, organisation wide.

Finding documents has become much easier for staff, as they can go to one central single source of truth and don't have to spend time thinking about how other users may have filed the information.

This was a worry at the start of the project, as users had limited technical understanding of computers. But due to its ease-of-use all users enjoyed using the software, which has increased user acceptance, willingness for good documentation and easy record keeping.

It also meant that Care Assessment forms were able to be filed remotely, which ensured that information flow was fast, auditable and complete. With ELO Remote, workers are able to complete these forms on tablets offsite and get the carers to sign any documentation.

A benefit that was fantastic to learn about, and that has greatly motivated the ELO team, is the emotional support that the solution has been able to provide. The work that Kennerley undertakes is very emotionally taxing on its staff.

Having the ability to do work remotely has given users the flexibility they need to stay strong. Andrea Sturges - General Manager at Kennerley - is hoping to bring in a 4 day at the office, one day at home as the standard, so that team members can take the time they need to deal with the emotional stress better. While this started with COVID, it will continue afterwards, as Andrea sees this as the future of work.

It is Andrea's strong belief that in the near future more workplaces will invest more on the importance of the wellbeing of their workers, and this will set those organisations above others. It also means workers will value their organisation far more than a simple salary raise would. And ELO will be there to help.

"Having documentation in a digital format also allows it to be shared across several folders, rather than having duplicate copies spread across our system. With the strong search engine provided by ELO, the fear of losing information has been eliminated, and we feel, we have a system that is flexible, versatile and robust enough to carry us into the future." -

Carol Baker, Information Management Coordinator

The Challenge

Issues with its electronic document storage systems, out-of-date documents, duplicate files and more were all plaguing and hampering the crucial services that Kennerley Childrens Homes provides.

The Aim

Provide an intuitive and easy to use records management system that allowed for proper version control, easy remote access and to expand the critical work that Kennerley is engaged with.

The Solution

- Improve document, workflow and compliance challenges
- Full version control on all files
- Enhance Search Capabilities across the whole repository
- Remote access on multiple devices
- Reduce overheads across the board

Modules

- ELO Records Management
- ELO Print & Archive
- ELO for Mobile
- ELO Web Client
- ELO Automation Services

Benefits

- Reduced search times for up to date documents increased user's efficiency
- Easy to use system meant that case workers were more likely to correctly use the system
- Simplification and automation of document filing
- Access ELO regardless of location meant the information flow was fast, auditable and complete
- Allow case workers to work from home and take emotional rest when they need it



Reducing the PTRS compliance burden

International technology and services company, Profectus, has leveraged global AI-driven analytics platform, Sisense, to help save Australian businesses hundreds of hours in compliance time for the newly enacted Payment Times Reporting Scheme (PTRS).

Effective as of January 1 this year, PTRS requires businesses and government enterprises with an annual total income of over \$AU100 million to biannually report on their payment terms and practices for their small business suppliers. These reports will then be made publicly available via the Department of Industry's PTRS website.

The Payment Times Reporting Scheme places considerable pressure on businesses to both surface data and report on payment times swiftly and publicly.

Profectus has partnered with Sisense to take a highly automated and data-driven approach to this PTRS compliance, in order to save businesses time and money by:

- Submitting the reports to the Department of Industry on the organisation's behalf,
- Setting up reporting for multiple entities,
- Gaining access to live remediation reporting via its Delta BI platform (powered by Sisense), and
- Providing visibility of progress against the PTRS metrics.

"Compliance legislation is a burden to Australian businesses and can be time and labour-intensive, often involving the use of manual spreadsheets. By using technology, AI, automation and data-driven approach, we are moving this burden into an opportunity for large organisations to start thinking about how they can improve their business operation, whilst supporting the vital cash flow of the small suppliers they work with," explains Robert Visentini, Chief Product Officer at

Profectus Group.

"This reporting would otherwise be quite onerous for organisations, particularly those who operate multiple entities.

Profectus is actively engaging with the Australian Government to discuss the report submission process, challenges in data collection and accuracy, and communicate to large organisations about upcoming timelines as the PTRS is rolled out.

For more information on the PTRS scheme visit https://www.profectusgroup.com/payment_times_reporting_scheme/

What information needs to be provided in the PTRS?

- Distribution of invoices paid to small businesses paid within 20 days, between 21-30 days, 31-60 days etc
- Percentage of total AP spend that is paid to small businesses
- The range of payment terms offered to small businesses
- Details of any specific payment arrangements with small businesses
- How supply chain finance is used

Important dates:

- 17 December 2020 – ability to register eligible entities for the PTRS, and gain access to the Small Business Identification tool via the Government's PTRS portal
- March 2021 – PTRS report format made available
- June 2021 – end of first reporting period (for organisations with financial year-end in January or June)
- 30 September 2021 – submission deadline for those organisations

iCognition achieves ISO27001 certification

Information Management and Governance (IMG) specialist, iCognition, has achieved full ISO27001:2013 Information Security Management certification. The recently awarded certification covers all information security aspects of the delivery, management and support of iCognition's Electronic Document and Records Management software as a service (EDRMSaaS). [EDRMSaaS.Cloud](#) is iCognition's highly secure, robust EDRMS cloud service delivered on Microsoft Azure Central.

In 2020 iCognition completed the transition of a number of clients to its [EDRMSaaS.Cloud](#) service. These include Tasmanian Department of Primary Industry, Parks, Water and the Environment, Perpetual Limited, The Geo Group Australia and Catholic Education Canberra/Goulburn. This is in addition to University of NSW extending their Micro Focus Content Manager cloud service for a fourth year.

"ISO27001 certification gives our customers complete confidence that we will manage their information securely in our cloud service", said

Nigel Carruthers-Taylor, iCognition Executive Director.

"The ISO27001 security standard guarantees that iCognition will apply rigorous security policies, processes, technology and resources in delivering our cloud service.

"Combined with the Australian Government certified Azure Central infrastructure, this means clients can trust us with their information and be assured we provide quality support and resources."

iCognition's cloud offering is continuously improved and is a government standard highly-secure and robust platform encrypted end-to-end, managed to the ISO27001 Information Security Management standard, and can be delivered with iCognition's optional innovations that provide additional value-for-money.

For more information about iCognition solutions and service offerings, email via <https://www.icognition.com.au/enquiry.aspx>



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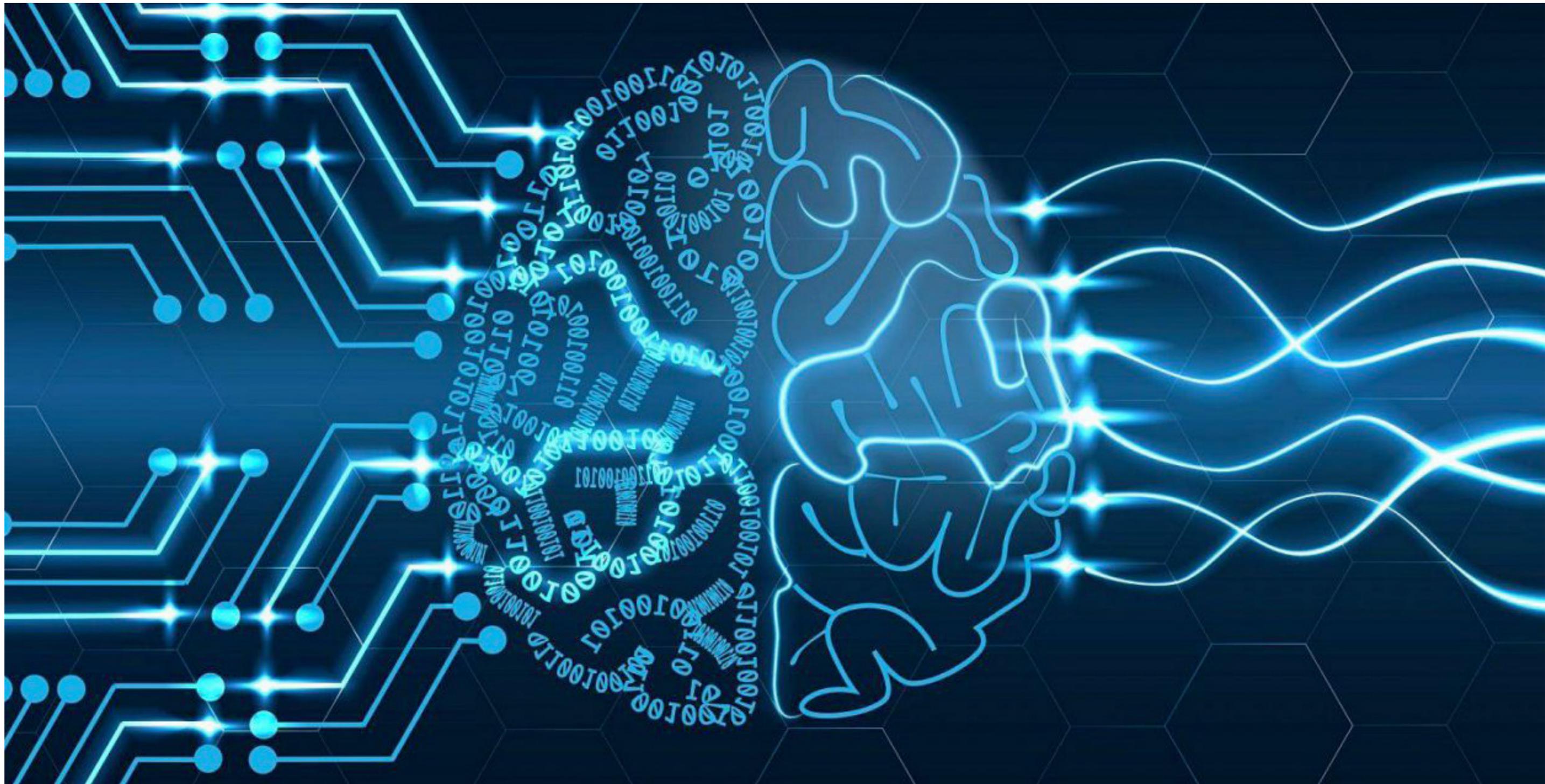
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Skilja unlocks the power of Intelligent Document Processing (IDP)

The year 2020 was a wakeup call for cloud adoption and digital transformation. Intelligent Document Processing, or IDP, is increasingly seen as a critical next step to increasing process automation and handling the huge amount of inflowing data. But what is IDP exactly? To learn more IDM spoke with Alexander Goerke, CEO and Founder of Skilja, a company developing essential technologies for understanding documents.

IDM: What is IDP and how does it differ from data capture, classification and RPA?

AG: Intelligent Document Processing is an extension of classical data capture technology. It aims to take documents that were created for human readers and make them intelligible to machines.

Typically, data capture has been used in the past to automate predefined document driven business processes using a variety of different technologies including OCR, Forms Recognition or Anchor based detection of keys in a document.

Data capture is applied to fixed forms and semi-

structured documents such as invoices and order confirmations to automate repetitive cognitive tasks. With the help of rules or machine learning, the patterns that allow humans to recognize entities in documents are identified so that the IDP software can repeat a task over and over again. We hesitate to call this artificial intelligence (AI) and prefer the term "cognitive technologies" as the software actually tries to mimic human understanding and learn from human input.

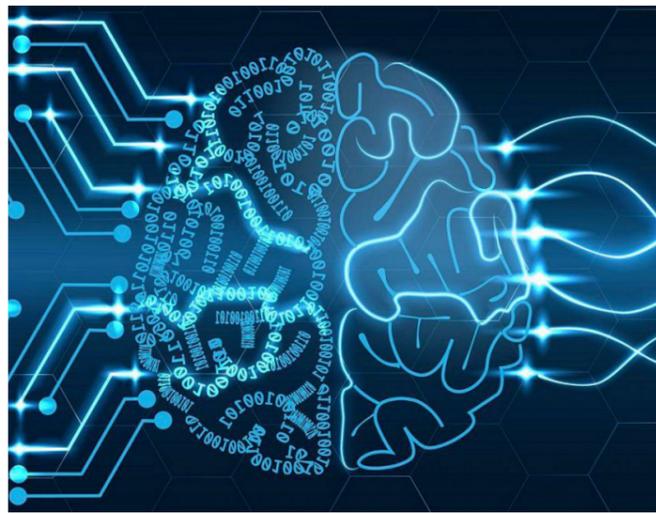
IDP is the next generation of data capture and is typically applied to all kind of documents, even totally unstructured contracts and correspondence, learning from human input how to understand content. In contrast to enterprise data capture in the past, IDP typically does not require dedicated setup and instead "learns" from the "human in the loop" and gets better over the time. The technologies that enable IDP include a variety of syntactic and semantic

analysis steps combined with statistical evaluation and deep learning neural networks that are used in a complex background validation and learning service to continuously create and enhance the knowledge needed for document understanding.

Classification is of course a vital part of this.

RPA on the other hand is a consumer of the results. RPA is performing tasks that can be codified (scripted) - often interfacing between two systems - and therefore rules-based. It sends documents for interpretation to an IDP server and then can use the structured output of IDP to make automated rules-based decisions or simply transfer the data into another system.

(Continued Over)



(Techniker Krankenkasse Public Insurance) in Hamburg that processes 600,000 documents every day with an automation rate of 87%. Think about the savings! Many banks are using it and we see a big demand in insurance claims management. Many insurers are now using IDP to provide no touch claims processing that uses automatic predictions based on the extracted data to say if a claim is valid or not.

IDM : What new capabilities do you expect the industry to deliver in the next 5 years?

AG: I expect that the adoption of IDP will grow vertically and horizontally. Vertically it will become a vital part of many business processes that are presently out of reach. The ongoing evolution of intelligent algorithms will also allow IDP to tackle complex problems with minimal setup that will go beyond the traditional high-volume process we see today. Online Machine Learning plays a vital role here as it allows you to start with basically no setup and let the system improve based on human feedback over time. Of course, a lot of precautions need to be taken so the system learns the correct things and does not deteriorate. There are many infamous examples of Bots that went south based on wrong training data. Machine learning systems require an elaborate infrastructure of checks and balances that silently work in the background to build incremental improvements. We have built this as a set of services that are used by a lot of customers with amazing success.

Technologically we expect that online learning with an elaborate quality checking infrastructure leads to even more machine learning and automation of setup. It does not really matter if neural networks, statistical analysis or semantic methods are used. What is vital is that the machine can detect and validate the correct patterns and forget the wrong ones. So, interestingly enough "sagacious forgetting" will be a major challenge to these semi-automatic bots in the future.

Download a Skilja Document Auto-Classification White Paper at <https://skilja.com/classification/>



After a lengthy career in the global document and information capture industry, Alexander Goerke founded Skilja (Icelandic for "to understand") in 2012. Skilja has built its own cloud-enabled document processing platform that incorporates unique machine learning and intelligent algorithms. Skilja also provides Data Classification and Extraction software that is utilised by other third party IDP solutions.

<https://www.linkedin.com/in/alexandergoerke/>

IDM: How does IDP accelerate value to processes?

AG: IDP is a vital part of scaling and speeding up processes that require human interaction to understand data in documents. Intelligent automation is the combination of IDP with RPA because it bridges the gap between unstructured data, human verification/validation activities and the structured data that is needed to automate processes. Not only are processes accelerated, they can also run round the clock and be scaled almost arbitrarily (in the cloud almost without additional cost). With IDP and RPA, even small tedious tasks on a desktop can now be automated. Even if only a few dozen surveys or time sheets need to be entered into a backend every day, that will still take up an hour each day of somebody's time. Nowadays with IDP it is easy to set up a system that will take this task over from an office worker and allow them to focus on other tasks.

IDM: There are many IDP solutions in the market today promoting proprietary machine learning models. How do you benchmark the performance of IDP engines?

AG: Humans are still the gold standard, so we want to mimic human understanding. IDP software aims to reproduce the data fields and indexes without having seen the documents before. The level of automatic recognition is described as "Recall" - the percentage of all fields that are automatically found and correctly recognized. The other side of the coin is the error rate, measured by "Precision", which indicates the accuracy of the system as a percentage of correctly recognized fields related to all recognized fields. Humans do make errors entering data, so in a project we adjust an IDP system to match the human error using recognition confidences. Typically, human error rates are about 1% so we allow that for the machine. This typically provides a "Recall" rate greater than 90, meaning 90% of all fields do not need to be read and touched by anybody. Modern IDP systems have built in benchmark tools that allow us to measure the quality of IDP against a ground truth sample.

IDM: Do you feel automated classification technology has now evolved to the level where regulated industry professionals can rely on it?

AG: Yes of course. Most of the projects we see are in the financial and insurance industry. All big public insurance companies in Germany use IDP to process their customer correspondence. Our largest customer is TK

What are the essential ingredients of Capture 2.0?



The teaming of advanced machine learning technologies with traditional OCR and Robotic Process Automation (RPA), is providing new possibilities for organisations overwhelmed with processing a digital deluge of messages and documents.

Frank Volckmar, Managing Director of TCG Australia and New Zealand, believes the possibilities unleashed by these new cutting-edge technologies have unleashed a new paradigm, variously described as 'Hyperautomation' or 'Capture 2.0'.

TCG Process utilises the Skilja classification engine in its intelligent document process automation platform, DocProStar.

Volckmar sees the rising use of mobile applications as a critical shift in way consumers wish to engage with many organisations which has paved the way for a shift to online processes.

"With financial services companies reducing their network of branches and eliminating customer engagement roles in favour of digital applications, loans and claims transactions, the volume of digital documentation has increased dramatically. This is both a challenge and an opportunity," said Volckmar.

"The confluence of high-performance classification, RPA and Web services technologies with proven validation methods and data capture is enabling organisations to respond faster and smarter to customers digitally. The fintechs have set the expectation with consumers and technology is now making it easier for others to transform.

"Adopting these IDP platforms is becoming a business imperative to win business and streamline costs. The ability to deliver a high quality, fast digital customer experience is becoming a defining criteria for many organisations."

Predicting that Hyperautomation would be one of

the Top Strategic Technology Trends for 2021, The Gartner Group noted that, "Many organizations are supported by a "patchwork" of technologies that are not lean, optimized, connected, clean or explicit. At the same time, the acceleration of digital business requires efficiency, speed and democratization. Organizations that don't focus on efficiency, efficacy and business agility will be left behind."

TCG Process is working with partners and BPOs in the region to utilise IDP solutions to digitise complex onboarding, application, loan, claims and mailroom processes for many organisations primarily in banking, insurance, healthcare and government.

<https://www.tcgprocess.com/en-en/contact/tcg-australia/>



Frank Volckmar, Managing Director of TCG Australia and New Zealand

Industry Profile: DocsCorp CEO and co-founder, Dean Sappey

Dean Sappey has overseen the growth of DocsCorp into a global provider of software and services for document professionals who use enterprise content management systems. IDM asked Dean to outline the path to developing a global brand with 500,000+ users located in the Americas, Europe, Asia Pacific, and beyond.

IDM: How did you come up with the idea for the company?

DS: pdfDocs, which we released in 2003, was all about creating PDFs and editing them, collating them and creating binders and closing books.

At the time, both co-founder Shane Barnett (CTO) and I, had our previous businesses acquired by a solution provider and we were working there as product managers. We had customers who were accountants and lawyers saying we want ways of turning all our documents into a collated set of PDF documents, which we could email to our clients rather than printing them out, which was the old-fashioned way.

So, we came up with this idea for a PDF product, and we pitched it to the management there, and they went 'Nah, no one will want that'. They were not going to spend the money on it.

So, we decided to leave and essentially workshop three or four different products that were all around allowing professionals, lawyers and accountants to create and work with documents using their tax or compliance products. They wanted to create a Word or Excel document and share it with their client without building a Web portal. So that's how we came up with the first product,

IDM: Many of the capabilities offered by DocsCorp products in PDF editing and document comparison are embedded in the standard Office suite from Microsoft and Adobe, which are widely deployed. How does an Australian start-up stay ahead in that race?

DS: Firstly, our products are designed specifically for lawyers and accountants. In Acrobat, there are many features that they don't need; for instance, functions for performing four colour separations on graphics. Lawyers and accountants need very tight integration between products and their document management system, where they store documents. The major vendors don't build that integration because it's too specific a market for them. We build workflows around our application that work better and are better integrated. Microsoft has a document comparison feature in Word, but it is inferior, it just doesn't get it right in many cases. Most law firms won't use Microsoft Word for contract comparison; they will use a specialist tool like ours that is robust and reliable and gets it right every time. They can't afford to miss a change between the two documents. So that's how we compete with Microsoft, we do it better. Depending on what country you are in,

compareDocs is either the No. 1 or No. 2 product for document comparison. In the case of Acrobat, the workflows and integration of pdfDocs are much better suited to people working in professional services.

IDM: DocsCorp has undertaken two acquisitions in the past 12 months, what is the strategy driving these acquisitions?

DS: While we kept building products, we also began looking at the other things we want to do, and there is only so much we can build at any one time so more recently we have started looking at acquiring other products.

We also have many government organisations and other sectors using our products, around 30% of our customers are outside of the legal and accounting industries. However, legal and accounting is still a major area of growth. Our acquisition strategy is to expand the platform of products we can provide to get further embedded in those organisations. Customers are increasingly saying to us they want a single vendor providing a whole suite of applications to help do everything relating to creating and managing their documents. We aim to provide all their document tools on a single toolbar.

The first one, veroDocs back in July 2020, was around template creation, allowing law firms to create a document template. It just asks the user simple questions and then creates a document personalised for the particular branch they are working in. Our most recent acquisition of Docuble allows law firms to restyle their documents to their specific style. Law firms all have their way of using styles, numbering schemes, and templates. For lawyers to do that themselves in Microsoft Word using styles is complex. It needs a specialist paralegal or secretary to do that, and nowadays lawyers don't have that. Our customers are also saying they want one vendor and one toolbar in all of their applications, one place to ring for support and one place to deal with licence renewals. So we have been looking at products to add to our existing suite of products that may have proven themselves in a particular country, but have not gone global. We have a worldwide network to do that.

IDM: Is the Microsoft Office suite still the standard for law firms and accountants?

DS: We've seen some interest in Google Docs and things like that, and even in Microsoft Office Online, but if you talk to anyone doing heavy-duty document work every day, they are using Office on a desktop PC, and they will continue to do so. They want our applications sitting inside that and reaching out to their document management system. Our clients will continue to use specialist document management products for a long time because Microsoft does not provide the necessary compliance and certification. Also, organisations with 50 or more staff need



"Rather than saying this is the way you can work, this is how you're going to use that software, Australian culture is more about saying 'you work the way you want to work, and we will listen and adapt'. How our software is used in the US is quite different from how it's used in the UK."



Work Smart

specialised document management products that suit their workflows. We do not see Microsoft focussing on those industries because they are too specific.

IDM: In 2020, cleanDocs was enhanced with AI. What are your thoughts on the potential for AI to handle many of the manual tasks in document management?

DS: cleanDocs is about making sure you don't accidentally email a document to the wrong person in addition to removing metadata. When you're about to email a document, it can intelligently look inside all of your previously sent items and understand whether you should be sending this. We're seeing this take off in government and many regulated industries where if documents are emailed to the wrong person it can be catastrophic. Most data breaches are accidental, and cleanDocs AI can prevent them from occurring. If you email a document to somebody, realise it's wrong, and then send an email saying 'Look, I just sent you the wrong document. Can you delete it?' That document will be read, guaranteed!

IDM: DocsCorp contentCrawler converts image-based documents in content repositories and document management systems to text-searchable PDF. Is this still a big problem for many organisations?

DS: The number of documents being created from some scanning process is increasing exponentially. Most document management systems do not have

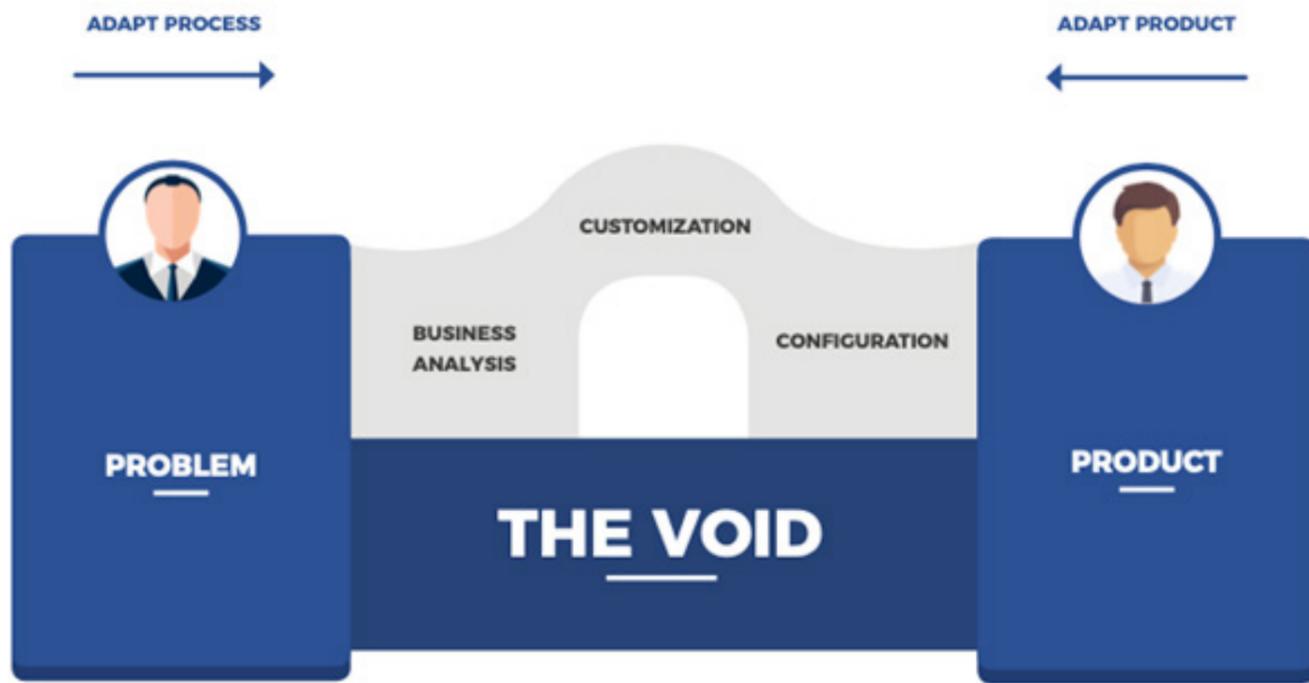
an inbuilt function to look through those documents and extract text. It's not just a problem for law firms and accountants - many government organisations and most banks in Australia have turned to contentCrawler to fix this. We have a cloud version of contentCrawler, which processed more than 2 trillion images this past year.

IDM: DocsCorp is just one example of an Australian software developer in the document productivity space that has succeeded internationally. Why do you think there are so many?

DS: I think many Australian businesses have started the hard way with venture capital money. They've started from the ground up, so there is a lot more passion from the people building the product. And very quickly, to be successful, you have to go international. Thus, they are much more open to accepting that different customers in different countries work differently. So rather than saying this is the way you can work, this is how you're going to use that software, Australian culture is more about saying 'you work the way you want to work, and we will listen and adapt'. How our software is used in the US is quite different from how it's used in the UK.

IDM: What advice would you give to other aspiring entrepreneurs?

DS: Just do it! But don't expect to be widely successful overnight. It will take many, many years of hard work. But if you're passionate and persist in improving your product, you'll be successful.



Why is your technology project failing?

By Gordon Taylor, Dinode

Late last year, the Queensland Audit Office released an excellent report into delivering successful technology projects. Based on current spending data, the Government of Queensland has \$A1.6 billion invested in around 116 existing active projects. Of those projects, 38% of them have requested additional funding increases, and 53% are currently operating on extended timelines.

In 2018, the McKinsey Center for Government did a survey of 3,000 public officials across 18 countries and found that 80 per cent of public sector transformations fail to meet their objectives.

What is it about technology projects that makes them so difficult to complete successfully?

Good Teams Deliver

As part of the QAO Report, the Auditor-General identified the following key success factors:

1. Projects are Aligned with Business Outcomes

"...Many technology projects in government are started because there is a need to avoid the cost of a failure in a legacy system (an old system that is no longer supported by its developer) ..."

QAO found that if the team that understands the business outcomes works actively and closely with the project team, the project had a greater chance of success. The people who understand the business problem and the legacy system should be the people who actively work on the solution.

2. The Team has the skills and capacity to match the challenge

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Technology Projects are high risk and often require specialist skills in advanced development, testing techniques, project management – project teams without adequate expertise in these chosen disciplines are more likely to fail.

3. Senior Leaders actively lead and challenge

Good hands-on leadership and active executive sponsorship are two hallmarks of successful projects.

4. Internal and External Teams work towards the same goals

If you're working with an external development agency, or an external software provider, you often end up with hybrid teams from both organizations, sometimes working in different countries. When the alignment of these two organizations is different, for whatever reason, then the project will tend to veer off-course. Consolidated, clear direction and effective use of incentive is critical in these situations.

5. Learnings are identified and acted on

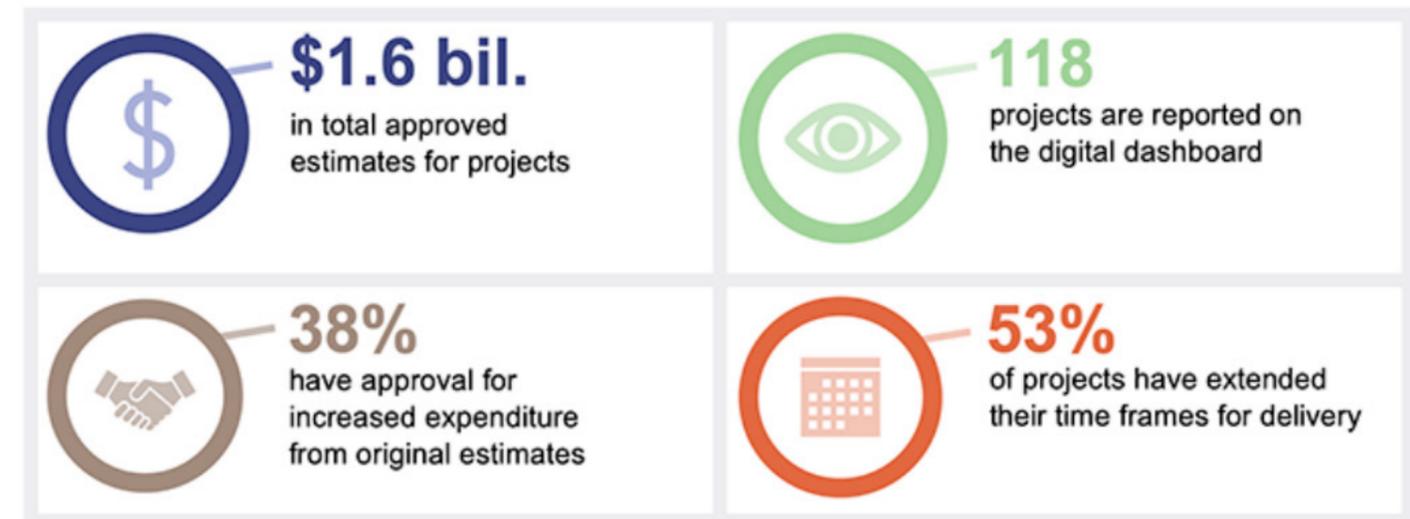
"It's only a stupid mistake if you make it twice", as the old saying goes, but too often the failures or successes of previous projects aren't captured or considered when undertaking technology projects.

These are all excellent observations – the strength and effectiveness of the team as a whole is crucial to success of any project. A great team will overcome even the most ardent challenge.

But there's more to it than just team dynamics. Most projects start with a statement something like:

"Either we build something from scratch, or we buy something that already does this."

This Build/Buy decision, more than any other, determines the kinds of problems that your technology project is going to encounter.



Source: Queensland Audit Office from the Queensland Digital Projects Dashboard.

Build

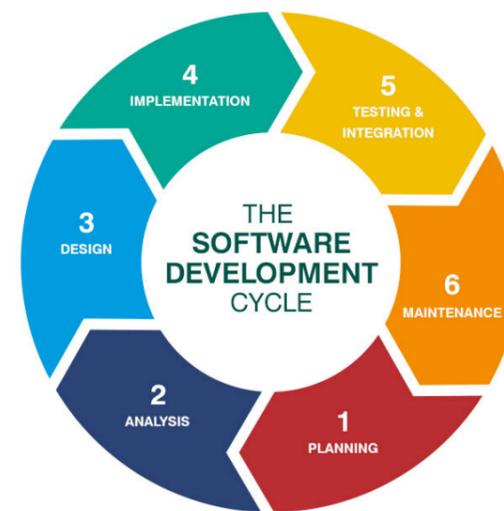
If you build, you face the risks of unknown estimates, complex dependencies, quality management.

You have the overhead of having to define, document and detail your business so that you can adequately explain it to a development team. You have to manage external stakeholders and delivery expectations.

Software Development Projects have a complex development cycle that depends on the team being acutely aware of everyone's responsibilities, and as such it can be quite brittle – failure to execute at any single phase generally affects all the others.

On the upside, you also have complete control over the project output.

If your requirements are particularly unique, you may have no other option than to build a dedicated solution.



Buy

Buying a solution can save you time and money and also offsets the responsibility for project risk.

If you buy, then you have a whole different set of

problems. Most importantly, you have to bridge the void between the way the software product you bought addresses the business problem, and the way your organization sees the problem. (See illustration above left.)

In our experience, it's really rare for these two things to line up exactly.

So now you have two ways across the divide – you can configure or customise on the software side, or you can modify your approach to the business to better match the product, which comes with a significant change overhead.

These unknown factors are the primary source of delays and budget overruns in a COTS Deployment.

At Dinode, we think that there is a better alternative to Build or Buy – Assemble.

We're making xMS to include all of the common building blocks that comprise enterprise software. We want a smart business analyst team to be able to put those together using their expertise and business knowledge to deliver the best of both the buy and build approaches to the organization.

By using a no-code platform like xMS to design and host the enterprise application that you need, you can leverage your internal business knowledge and experience, free yourself from external dependencies, and avoid chunks of legacy thinking creeping into the project from other systems, bringing more predictability and control into technology projects – which translates to better use of time and money.

Get in touch with us! We'd love to hear what your project challenges are.

<https://dinode.com/contact-us/>

Gordon Taylor started solving business problems as a fresh-faced trainee for the Australian Department of Defence. He then branched out into developing systems and software solutions for federal government before joining TOWER Software in 2000. His work with Records Management customers in the US and Australia led him to a leadership role with Hewlett Packard, where he managed the technical sales team for South Pacific.

[REVIEW] Kodak alaris S3100f scanner



Kodak Alaris has expanded its document capture portfolio with the launch of a new line of low-volume production scanners. IDM took a look at a model in the new S3000 series which provides the entry level into A3 scanning.

The model we previewed was the S3100f, where the f indicates integrated flatbed capability. This is a 100ppm scanner that is part of the Kodak Alaris push to take the document capture point to the start of a business process, rather than something that happens to documents after they have been dealt with.

Previously document capture may have been done at the end of a process as a means of keeping a record. The new scanners and software from Kodak Alaris are designed to provide an automated portal for integrating paper-based information into digital workflows and archives.

The S3000 series is the entry level for A3 scanning with the i4000 and i5000 series offering additional features for high volume workflows.

Differences with the previous model i3450 which it replaces become obvious when the scanner opens up and you notice it is now completely black inside. This is to provide better contrast for scanned documents to allow automatic splitting of multiple scanned documents.

The S3100f also includes a colour touchscreen control panel with buttons able to be customised for different users and network connectivity whereas the i3450 was USB only. This allows the S3100f to live on a network and provide shared scanning capabilities for a workgroup, as it has sufficient processing power on-board to not require connection to a host PC.

Many functions that previously required a user to return to the PC have been embedded in the S3100f so they can be completed using the control panel. This embedded capability is powered by the Kodak Perfect Page technology, which performs over 30

enhancements on every image that is captured during the scanning process.

The Capture Pro Limited Edition software included with the S3100f now offers the ability to export to SharePoint in addition to other cloud repositories.

There is increased feeder capacity with a 300-page input hopper and built-in image processing. This includes the ability to digitally stamp a document at the point of capture rather than in a post process, providing enhanced traceability. Configuring your document stamping options is a simple option function available within the scanner driver, so that users can get the most out of the scanner regardless of the downstream software used in the included Capture Pro Lite software.

Another new feature made possible by the embedded processor in the S3000 series scanners is barcode enhancement. So, if you scan a proof of delivery document for instance and ask the software to configure Kodak Capture Pro undertake a database lookup, if the barcode is not recognised, the user can rescan that particular page with additional it will stop the scanning to enable it to be rescanned with the barcode enhancement enabled.

The flatbed scanner is noticeably improved in the S3100f, particularly for book scanning with an improved swingout for thick books and capacity for book edge scanning.

Where you have multiple documents that you don't want to put through the rollers, just place them on the flatbed and let the S3000 series scanner automatically split each document, saving the time it would take to scan them individually. Capture Pro Lite will automatically split them into multiple documents.

The S3100f has been designed as an A3 workhorse and with its ability to live on a network and handle the needs of dozens of users it provides significantly lower cost of ownership than an MFP.

<https://www.alarisworld.com/en-au/solutions/document-scanners/departmental#section%201>

Box buys into e-Sigs

Box, Inc. has entered into an agreement to acquire SignRequest, a cloud-based electronic signature company. Box also previewed Box Sign, an e-signature capability that will be developed on SignRequest's technology and natively integrated into Box.

Box Sign is expected to be included in Box business and enterprise plans, enabling customers to modernize the way they work and digitize important processes, while ensuring their agreements can be securely managed and governed in the Box content cloud.

Google acquires DR firm

Google is acquiring backup and disaster recovery (DR) firm Actifio which offers an ability for users to protect virtual copies of data in its native format, manage these copies throughout their entire lifecycle, and use these copies for scenarios like development and test.

Actifio offers services to:

- Increase business availability by simplifying and accelerating backup and DR at scale, across cloud-native, and hybrid environments.
- Automatically back up and protect a variety of workloads, including enterprise databases like SAP HANA, Oracle, Microsoft SQL Server, PostgreSQL, and MySQL, as well as virtual machines (VMs) in VMware, Hyper-V, physical servers, and Google Compute Engine.

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

Onit NZ buyout to drive AI workflow

Onit, Inc., a provider of enterprise workflow solutions including enterprise legal management, contract lifecycle management and workflow automation, has acquired McCarthyFinch and its artificial intelligence platform that accelerates contract reviews and approvals by up to 70% and increases user productivity by more than 50%.

The company plans to further its innovation through AI by evolving its product offerings as well as the software provided by its legal operations management software subsidiary SimpleLegal.

The technology will become an integral component of Onit's new artificial intelligence platform **Precedent** and the company's first release on the platform will be **ReviewAI**.

"Our vision is to build AI into our workflow platform and every product across the Onit and SimpleLegal product portfolios," stated Eric M. Elfman, Onit CEO and co-founder.

"AI will have an active role in everything from enterprise legal management to legal spend management and contract lifecycle management, resulting in continuous efficiencies and cost savings for corporate legal departments."

Nick Whitehouse, McCarthyFinch's CEO and co-founder, is now the general manager of the newly rebranded Onit AI Center of Excellence. He is joined by vice president of legal, Jean Yang, who is now vice president.

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An Integrated Approach to Information Governance



By Sonya Sherman

Photo by Scott Graham on Unsplash

This article aims to generate discussion about strategies to improve information security and information sharing. It considers mechanisms to support people handling sensitive information (recognising the human factor as a key vulnerability in security programs); leveraging existing systems and frameworks to enhance interoperability; and encouraging knowledge sharing between IG professionals across different domains.

Now in its third iteration, the Email Protective Marking Standard (EPMS) is an Australian innovation to identify the sensitivity of content shared by email. It was through conversations with some of the co-authors of the original EPMS that the concept for this paper was formed [i]. As a technical specification recognised by diverse vendors, EPMS enables non-proprietary information exchange. A similar open standard for documents seems long overdue.

Both national security and crisis management require highly sensitive information to be securely shared between applications, individuals, organisations and jurisdictions. Automation can support people sharing sensitive documents, making their jobs easier and safer by reducing manual handling and the risk of errors. This could be achieved by enhancing existing capabilities and standards, drawing on frameworks from both information security and records management.

Open standards and technical specifications are essential for interoperability - eliminating vendor lock-in, technical dependence, legacy issues and digital preservation challenges. Existing standards describe the metadata required for managing documents, but don't specify how this metadata should travel with the document when it moves from one environment to another.

Geopolitics and COVID-19 bring renewed focus to cybersecurity

Cybersecurity is a priority for all organisations, and an especially hot topic in government right now.

Throughout 2020, pandemic response drove digital transformation at previously unseen (did somebody say "unprecedented") rates. Barriers and objections were swept aside to swiftly enable remote working and coordinated action. In one survey, 85% of CISOs admitted they had sacrificed cybersecurity during this transition. Both national security and crisis management require highly sensitive information to be securely shared between applications, individuals, organisations and jurisdictions. It's also well recognised that data, information and digital infrastructure are the keys to economic recovery.

This means, a growing volume of sensitive information is being exchanged through systems and processes that may have been hastily implemented - and are of ongoing importance.

In 2020, the Australian Government released a new cybersecurity strategy, drafted principles to protect technology supply chains and consulted on an enhanced regulatory framework and amendments to the Security of Critical Infrastructure Act 2018. It is also expected to re-establish the role of Minister for Cybersecurity, flagging the importance of this function at the highest levels.

The 'human element' impacts cybersecurity costs and risks

But security is not just about technology; it's about people too. According to Gartner, organisations around the world spent \$1 billion on cybersecurity awareness training last year and this shows no signs of slowing down.

Human error remains the second largest source of data breaches reported to the Office of the Australian Information Commissioner (OAIC) [ii]. Similar analysis from the UK shows an element of human error in up to 90% of notifiable breaches and it's the only cause that has continued to increase in frequency [iii].

The pandemic has also seen a surge of concerns around accidental or improper sharing of data, with 92% of organisations considering it a critical threat [iv].

This is hardly surprising when the leading factors influencing mistakes are stress, fatigue and distractions [v]. It's difficult to create a physical environment that supports concentration and focus when people are operating from home alongside partners, kids, housemates and pets.

Identifying and addressing staff capability gaps is a high priority. How can we better support people to safely use and exchange sensitive information, and reduce the likelihood of human errors?

The case for integrated information governance and interoperability

I think part of the answer can be found at the intersection between information security and records management, through enhancements to existing standards and capabilities - and sharing knowledge between skilled professionals.

Information governance provides a unified strategic framework to protect and optimise corporate information assets [vi]. Each element of information governance is focused on specific risks and benefits.

Organisations can gain the most when different elements work together. The frameworks and tools of different disciplines can also be leveraged to solve each other's challenges. This is why the National Archives recommends coordination through a Chief Information Governance Officer or Information Governance Committee.

Interoperability addresses the ability of systems and services that create, exchange and consume data to have clear, shared expectations for the contents, context and meaning of that data [vii].

An example: sharing sensitive or classified documents

If we focus on a particular use case, we can examine the challenges; identify useful standards or capabilities; and consider potential enhancements.

One example involves sharing documents which contain sensitive or classified information, between an agency in federal government and an agency in a state government.

(Continued Over)

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In this example, a document is stored in a secure corporate repository such as an electronic document and records management system (EDRMS). An officer at the “sender” agency shares a copy of the document as an attachment to an email. An officer at the “receiver” agency captures the email and attached document into their own corporate repository.

The document is moving through at least four different applications (2 email systems and 2 EDRMS); between jurisdictions with aligned, but not identical, regulatory requirements; and organisations with different information management frameworks and technology infrastructure.

This involves quite a bit of manual handling and human decision-making. It requires staff to have knowledge of policies and skills to apply them. It also relies on both agencies to interpret policies in the same way, to ensure sensitive information is handled consistently. This is fairly inefficient, and leaves a lot of points where mistakes can occur.

However, some parts of the process (i.e. the email transmission) are enabled through automation and interoperability. We can consider this as a model when we look at enhancement.

InfoSec and RM policies and standards

The key policies and standards that apply in this example include:

- the [Protective Security Policy Framework](#) (PSPF), which assists agencies to protect their people, information and physical assets. Under the PSPF, the goal of information security is to maintain the confidentiality, integrity and availability of official information. It establishes the rules for grading, labelling and handling sensitive and security classified information.
- the [Email Protective Marking Standard](#) (EPMS), which is provided in an Annex to the PSPF. It provides a standard format to apply protective markings to the internet message header extension and/or subject line of an email. This helps with construction and parsing by email gateways and servers, and allows for information handling based on the protective marking.
- the [Australian Government Recordkeeping Metadata Standard](#) (AGRkMS), which assists agencies to maintain reliable, meaningful and accessible records. The minimum metadata set identifies essential properties for management and use of business information and transfer between agencies.
- the [Digital Continuity 2020 Policy](#) (DC2020) and its successor [Building Trust in the Public Record](#), which comes into effect on 1 January, 2021. These policies establish requirements for managing Australian Government information assets (records, information and data).

These policies [reference](#) each other. They are designed to work together, and to support other types of access restrictions, such as personal privacy and legal privilege. The PSPF and EPMS require Australian Government agencies to apply the AGRkMS metadata properties.

According to DC2020, the minimum metadata set should be applied to all information handled by Australian Government agencies by 31 December 2020, to meet Principle 3: Information, systems and processes are interoperable.

The target carries over in Action 10 of Building Trust in the Public Record, which requires agencies to ensure

business systems, including whole-of-government systems, meet functional and minimum metadata requirements for information management.

At the end of 2019, just over 40% of agencies reported meeting this target [viii].

Policies and standards across jurisdictions

The policies and standards described above apply specifically to Australian Government agencies. However, state government agencies are required to handle documents received from the federal government in accordance with the PSPF (and EPMS). While each state will maintain their own information security policy, many have mapped their requirements to the PSPF to support consistent handling of classified material.

The AGRkMS is the basis of the Australasian standard AS/NZS 5478:2015 Recordkeeping Metadata Property Reference Set ([RMPRS](#)), which is broadly endorsed by government records authorities across Australian states and New Zealand. Each jurisdiction maintains a mapping to AS/NZS 5478, to enable interoperability.

The Australasian standard is also compatible with the international standard ISO 23081 Metadata for Records series.

There have been calls for regulatory coherence more broadly, across the APAC region - particularly in relation to privacy. Like regulatory coherence, technology standards provide clarity about how information is handled when it moves across boundaries and between systems - building business confidence and public trust.

Challenges and opportunities to enhance AGRkMS

Metadata provides the means to codify rules or policies in a machine-readable form, which can be used to drive automation. Automation can reduce manual handling and human decision-making, decreasing the risk of mistakes. The EPMS is a great example of how this works in practice:

- Emails are consistently marked: prominent labels visually flag sensitive content and prompt staff to handle appropriately;
- Message files include standard metadata: protective markings are machine readable so they can be handled consistently by both the sending and receiving systems, regardless of the software.

The AGRkMS does not specify the means of encoding metadata into the properties of a document.

Metadata may be applied to a document while it is under the control of a particular application - such as an EDRMS or Microsoft environment. While the document remains under the control of that application (either because it is stored in the repository or otherwise linked to the governance engine), the metadata can drive automation for handling and managing a document according to the rules.

But once a document is removed from that controlled environment, and shared or transferred to another application or organisation, the capability is lost. Metadata may be completely stripped out prior to transfer. Any remaining elements, apart from the title, are likely to be non-standard and may not be useable by other applications.

This is a missed opportunity, not only for security but also for digital working and broader records

management. If standard metadata was embedded (or bundled/encapsulated) and could “travel with” a document, any other system could use it to drive automation.

No matter which software was used to generate the document (e.g. Microsoft, Google, Adobe, image or media applications), it should be possible for the receiving system to read the metadata and act accordingly.

For this approach to succeed, metadata must be actionable, not merely descriptive. In our example, it could enable confirmation that a document has the same or lower security classification as the email to which it’s being attached. It could also support capture and filing into the receiver’s corporate repository, pre-populating metadata profiles. This could subsequently drive downgrading of security according to expiry rules and other benefits outlined in the next section.

Enhancing AGRkMS to address this gap would:

- reduce the risk of manual errors;
- reduce the overhead on staff to manually re-enter metadata; and
- truly enable interoperability between different systems that handle documents.
- Additional benefits for information security, information rights and records management

In terms of protective security, agencies must respect the rule that the originator classifies information. Information received from another agency cannot have the classification changed without the permission of the originating agency. This has proven difficult to manage in practice.

Agencies are also cautioned not to over-classify information, so that the costs of protection do not outweigh the consequences of a breach.

Embedded document metadata about Expiry Rules could be used to drive automation that correctly downgrades protective markings, or schedules documents for review, in the receiving system or organisation.

Similarly, other potential benefits of embedded document metadata could include:

- Persistent metadata about the Creator (originating agency or custodian), who may retain ongoing legal responsibilities for managing the document.
- Persistent metadata about other information rights or restrictions could drive automated application of access rules in the receiving system or organisation, supporting consistency in managing privacy and cultural sensitivity, legal or commercial confidentiality, copyright or intellectual property, public access (FOI) and publication.
- Metadata about the originating Disposal Class could drive the automated application of a particular disposal rule in the receiving system or organisation.
- Metadata about the originating Identifier, so this copy could always be matched or compared with any other instance of the document — for integrity checks, version control, ROT identification and disposal management.

Enabling documents to be consistently managed in any system reduces the risk of vendor lock-in, supports the management of confidentiality, integrity and accessibility over generations of technology or through machinery-of-government changes.

Enabling more and different systems to support information security requirements, aligns with Australia’s Cyber Security Strategy 2020 — providing for a “hub model” rather than a single “honey pot” and layered approach to cyber threat sharing [ix].

(Continued Over)



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Where could it apply? How could it be used? Leveraging existing capability

There's a variety of software tools, common in many agencies, which could make use of embedded metadata to drive automation - supporting staff, improving efficiency and reducing risk of errors.

Many solutions will integrate with email tools to provide automated email capture -automatically filing messages stored in a particular inbox. These tools could potentially make use of embedded document metadata to capture a more detailed document profile in the corporate repository.

Specialised document classification tools can add highly visible labels and protective markings to the document content, as well as classification tags in the document properties. This could be driven more automatically, with standardised metadata supplied by file analysis tools or EDRMS using AGRkMS to enable secure sharing and interoperability.

File analysis tools can scan, map and manage documents stored in various locations. They may analyse and index documents to create a profile based on metadata and content. These tools are often used to identify documents containing personal information, so they can be managed according to privacy requirements; or to locate redundant, obsolete and trivial information (ROT) for disposal. If file analysis tools could report according to AGRkMS, they could potentially standardise metadata in the document properties and complete any missing elements.

Most agencies have some form of EDRMS. Their sensitive, high risk or high value documents generally make it into these systems, although there is plenty of document-based information stored in other locations.

EDRMS are "governance engines" with robust capabilities to manage records and maintain them in a tightly bound relationship with contextual metadata and audit trails of activity. Challenges occur when a single document is removed (or copied) from the repository to be shared with a system or organisation that does not have access or integration with the repository. Metadata may not follow the document, especially if it has been inherited from a parent folder/container.

Most EDRMS have capabilities that could potentially be repurposed or enhanced to make metadata available to other systems, when documents are shared outside the repository.

For example, they may provide a general export tool for system upgrades or migration. This is designed for transferring large volumes of documents, so may need some reconfiguration to be suitable for single documents.

Similarly, many EDRMS are certified to output records as a **VERS Encapsulated Object** (VEO) for transferring archival records to the Public Record Office Victoria. This process wraps a record up with the metadata and audit trail — which might be handy. It also converts the document to a preservation format (PDF), which may not be appropriate when sharing documents for active business use...

Other channels, not only email

There was already a significant shift happening in digital communication, but COVID-19 gave it a massive boost. The use of email was decreasing in some sectors, due in part to security concerns and in part to technological evolution.

Workplace changes accelerated the uptake of tools like Slack, Microsoft Teams, Google Docs, Monday and other

platforms with integrated chat, videoconferencing and file sharing. Sensitive and high value documents continue to be shared through these channels. Like email they are methods of transmission. They have the same needs for protective marking, labelling and metadata that enables proper handling and management. Embedded document metadata could be used by these systems too.

Can't I just encrypt everything I send?

As a concept, encryption seems great, in terms of applying permissions that follow a file no matter where it goes. Quite frankly that sounds like a dream come true, for an InfoSec or RM professional. However, it's often a proprietary approach which can restrict interoperability.

Encryption has been generally **discouraged** for many years by records managers, amid visions of self-destructing emails. It's not considered a long-term option for protecting information because it introduces a lot of **risks** for accessibility - impacting transparency and accountability. You can't get value out of information you can't access. Encryption is a heavy-duty solution that is best reserved for the most sensitive information. It's not something to throw at all your data stores. It has to be carefully implemented.

Conclusions and next steps

An integrated and multidisciplinary attitude to information governance helps us tackle the challenges of an evolving regulatory and technological landscape.

Geopolitics and COVID-19 have increased the need to share sensitive information and changed the way we work, bringing renewed focus to cybersecurity.

Human error remains a significant source of risk, despite heavy investments in awareness training. Automation

could help by reducing decision-making, manual handling and re-keying of data.

Automation is driven by metadata, which makes rules and policies machine readable. A standardised approach allows data and information to be managed consistently as it moves from one system or environment to another. A good example is the Email Protective Marking Standard (EPMS), which enables protective markings to be applied in the internet message header extension of an email.

The Australian Government Recordkeeping Metadata Standard (AGRkMS) offers a good foundation for documents. It needs to include an agreed mechanism for embedding metadata into document properties - similar to the EPMS. This would support secure sharing, reduce administrative overhead and provide a range of other benefits through improved interoperability.

Further Reading

For an introduction to the interplay between Information Security and Privacy, I can recommend this **White Paper** prepared by Salinger Privacy for Janusnet.

Sonya Sherman is Founder and Principal at ZEN Information.



Notes and References

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

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- Purchasing: electronic processing and delivery of supply chain documents.

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Tel: 02 9460 0406
Email: eloinfo@elodigital.com.au
Web: www.elo.com/en-au

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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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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.

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Email: info@icognition.com.au
Web: www.icognition.com.au

Contact: dom.mammoliti@icognition.com.au

Information Management and Governance (IMG) specialist, iCognition Pty Ltd, helps our clients to maximise the value of their information assets, while minimising cost and risk. We use an integrated Information Management and Governance approach that combines the disciplines of data, records, and information management to value, manage, control and harness information across the enterprise. iCognition's Electronic Document and Records Management System-as-a-Service (EDRMSaaS) represents 20 years of iCognition experience. It is a proven, secure and trusted Software-as-a-Service offering for Content Manager. It can also include iCognition's award-winning RM Workspace for secure web-based end-user access and collaboration, Office365RMBot for fast and easy information governance of Office 365 information, RM Workflow to deliver easy-to-use Content Manager workflows, and RM Public View for publishing and sharing to non-Content Manager users.

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

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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 PScapture, Flow, Ratchet-X RPA, Doc Mgt and FileBound.

PScapture is an innovative document capture platform engineered to combine automation, efficiency, stability and Enterprise-class scalability. PScapture provides unmatched integration with just about any ECM or ERP platform [e.g. SharePoint, Xero, Trim, Objective etc.] and allows the utmost in flexibility for deployment in large or small organisations.

Ratchet-X is a mid-market Robotic Process Automation solution that provides attended or unattended Bots for the automaton of enterprise work.

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

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APPS & APPLIANCES

Yext site search takes in unstructured data

Yext is upgrading its Answers platform for Web sites with the "Orion" update to its search algorithm due out on March 17. This will add advanced natural language processing (NLP) to answer complex questions against unstructured, long-form documents.

The extractive QA algorithm adds a powerful dimension to Yext's site search solution. For example, when someone asks a specific question, such as a customer searching a retailer's site for how to assemble one of their products, extractive QA scans a business's webpages, blog posts, help articles, or product manuals to find the most relevant word, sentence, or paragraph, then delivers a direct answer in the form of a rich snippet at the top of the results page.

This is distinct from traditional keyword search, which relies on only a single algorithm to match the query's keywords with the document that contains the most mentions of the keywords, then delivers the end user a list of links to click through.

<https://www.yext.com/products/answers/algorithm>

PSIGEN unveils PSICapture 7.7

PSIGEN has released PSICapture 7.7, the latest version of its document capture software featuring a variety of new and enhanced capabilities for faster processing of invoices and other documents that once required a high degree of data entry.

The latest release dramatically reduces software setup time through automated forms creation and validation.

As advanced capture software, PSICapture handles more than simple conversion of paper to digital and extraction of data from documents.

With optical and intelligent character recognition (OCR/ICR) technology and the newest version of the PSIGEN-developed Accelerated Classification Engine (ACE), PSICapture 7.7 captures and analyses documents before storing them in the cloud.

Designed to meet all the needs of an organization, PSICapture effortlessly integrates with any scanning device and over 60 different enterprise content management (ECM) and database systems.

Deploying PSICapture 7.7 is faster and easier, taking under 60 minutes to install and begin training it to process invoices.

PSICapture 7.7 brings performance modifications to the Accelerated Classification Engine (ACE) including automatic creation of zone profiles and accelerated classification configuration options within indexing modules.

Users can now manually reposition classification forms on the global classification list using the "Move To..." command, as well as a new ability to group

classification rules into sets.

The PSICapture 7.7 ACE enables Knowledge Workers to import never-before-seen documents and simply verify the automatic classification that ACE has completed during the workflow.

PSICapture 7.7 reduces the time needed to create and validate new vendor invoices and decreases the time to extract data by 99%. To put it another way, the time needed to create and validate these vendors has been reduced from over 20 minutes to less than 60 seconds because there are fewer required steps, pop-outs and data entry.

The software can extract data from physical documents - including constrained handwriting - digital files, incoming faxes, email, and more, converting each document into a searchable PDF before routing it to a cloud-based digital repository of your choosing.

For more information contact distributor Upflow at <https://upflow.com.au/contact-us/>

Lexalytics adds OCR Error Correction Tool

Lexalytics has launched a patent-pending error correction tool for text data from optical character recognition (OCR) systems.

Built in partnership with one of the world's leading RPA vendors and leveraging Lexalytics' natural language processing (NLP) platform and proprietary machine learning tools, the company's OCR error correction system can automatically detect and rectify common mistakes made by OCR, driving word error rates to less than one percent. This improves the reliability and utility of analysis performed on OCR data down the line and lowers non-compliance risk for the firms that use these tools.

A great deal of business-critical information is contained in images of physical text, such as scanned paper documents or smartphone snapshots of invoices, contracts, newsprint, applications, bills and loans, among other materials.

OCR software converts these images of text into electronic text, making it available for computers to "read" for all of the processing tasks that modern enterprises conduct. However, OCR software often misrecognizes characters and words, which can lead to costly downstream application problems requiring time-intensive, manual correction.

Lexalytics' patent-pending OCR error correction solution combines pixel position analysis for character errors, along with specialized dictionaries built into Lexalytics' Saliency text analytics engine to choose the most likely correction.

The next stage of development will add contextual language models and machine learning techniques to further improve accuracy.

The OCR correction module is available as an add-on component to the Lexalytics' core NLP Saliency engine.

<http://success.lexalytics.com/ocr>



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When it comes to collecting payments from customers, efficiency is key. That's where Esker comes in. By automating what can be automated in the AR process via our AI-driven solution, your team is free to focus on the activities that really matter to the business - customer relationship building and optimising cashflow.



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Improve CX

Utilise customer-friendly tools such as intelligent collections & dispute management.

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Managing multiple payment sources and formats can be a real pain for AR teams trying to allocate cash in a timely and effective manner. Esker's AI engine automates the manually intensive process of matching payments received from all incoming payment information sources so your team can focus on higher value tasks and control cash flow in real time.

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- Enhance visibility on cash likely to be received in near future and your total receivables
- Speed up deductions and/or dispute identification

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<https://www.esker.com.au/solutions/order-cash/accounts-receivable/>

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ReadSoft Online and Coupa in P2P play

Kofax has integrated with Coupa Software to help enterprises deepen operational efficiencies as they digitally transform their spend management processes. Integrating Kofax ReadSoft Online with Coupa Business Spend Management (BSM) Platform, organisations can transform invoice processing and payment processes with automation.

For instance, they can leverage document intelligence and machine learning from Kofax to extract data from invoices spanning multiple formats and languages, and then route extracted data into downstream spend management processes managed by Coupa – significantly reducing invoice processing time and overhead. The native integration between Kofax ReadSoft Online and Coupa, certified as a CoupaLink solution, significantly reduces complexity and accelerates adoption.

The procure-to-pay lifecycle has traditionally been laden with manual, paper-based processes for capturing, matching, approving and archiving supplier invoices. Although these processes lend themselves to automation, only 10 percent of accounts payable leaders describe their departments as being fully automated, with few or no manual tasks. Such a highly manual state of operations limits efficiency and ability to drive enterprise value.

In contrast, highly automated organizations can reduce invoice processing time by as much as 80 percent compared to peers with little or no automation. Furthermore, strategic investments in automation technology can shift the procure-to-pay team from being a reactive and back-office transactional function into a data-driven and proactive resource providing insights moving the business forward.

Salesforce Health Adds Document Automation

Salesforce has announced that it will leverage Amazon Web Services (AWS) for machine learning document automation in its healthcare cloud offering. The new technology for healthcare and life sciences organization will increase digitization in management processes and minimize administrative burdens, reduce potential costly errors, and improve the overall patient experience, the company said.

The technology product, called Intelligent Document Automation (IDA), is designed for use with another new Salesforce tool called the Intelligence Form Reader, powered by Amazon Textract.

The Intelligence Form Reader taps into optical character recognition (OCR) to help increase accuracy of health document workflows, from processing patient referrals to patient services program enrolment, all on one platform.

Amit Khanna, VP of Health Cloud at Salesforce, said,

“The healthcare and life sciences industries continue to rely largely on legacy systems as well as faxes and paper documents to manage patient records and communication such as enrolling patients in care programs, patient referrals and intake. With that comes a set of operational challenges, such as receiving documents across multiple channels and manually entering and re-entering information into disparate applications like PDF editors and electronic health records.

“This often makes it difficult to find the right document for the right patient when it is needed quickly. This can also make day-to-day business processes, such as enrolling patients in a care program, managing the patient referral and intake processes, or verifying prior patient authorizations, disjointed and time-consuming. When inefficiencies like these occur, they can lead to potential patient care risks, lost revenue and a frustrating experience for employees and patients.”

Healthcare and life science organization personnel will be able to receive, process and track all patient and plan member forms in one place, eliminating the need to toggle back and forth from multiple screens.

<https://www.salesforce.com/products/health-cloud/overview/>

Semantik Invoice on Power Automate

Ephesoft has announced that its Semantik Invoice solution is now available on the Power Automate platform, Microsoft’s cloud-based suite of tools that provides integrations and business process automation.

Semantik Invoice one-click configuration allows any type of business user to easily integrate intelligent invoice processing into their automation workflows without code and deploy in minutes.

In the past, this would require custom code and long project times.

The Semantik Invoice connector serves as a bridge to over 400 applications that are on part of the Microsoft Power Automate platform, including all leading ERP, RPA, workflow and content management systems.

Semantik Invoice customers can deploy the solution in less than 5 minutes and rapidly integrate with any Power Automate app without any coding.

The Semantik Invoice connector is free to Power Automate users; services require a Semantik Invoice license or subscription. All Microsoft apps and systems customers have licenses available. Many of Ephesoft’s partner ecosystem of channel, technology, alliance, global consultancies and systems integrators already subscribe to Microsoft. The new offering will expand their offerings and solution options to customers.

https://flow.microsoft.com/en-us/connectors/shared_ephesoftsemantikforinvoices/ephesoft-semantik-for-invoices/

FineScanner 8 puts more AI on your phone

ABBYY promises the AI smarts in the new release of FineScanner 8 will enable the app to become your personal smartphone archivist. FineScanner will not only scan and store your documents but now can now automatically sort all of your photos into seven different document types, help you find specific photos using the search feature, and precisely measure your documents’ size using augmented reality.

ABBYY’s first-generation AI gallery automatically scanned your smartphone’s photo archive for documents with text. The latest FineScanner version boasts its own open-source machine learning library called ABBYY NeoML.

Thanks to neural networking, FineScanner is now able to automatically sort the photos in your gallery into the following 7 document types: A4, Books, Business cards, IDs, Handwritten, Receipts, Other.

The latest update will not only let FineScanner detect photos with text but will also classify them into different types. This means that you will be able to find the correct picture without having to scroll extensively through your gallery.

“Training” the neural network involved studying tens of thousands of photographs provided by a multitude of ABBYY employees. Artificial intelligence, like any diligent student, requires a wealth of knowledge to learn from.

As part of this process, ABBYY developers meticulously marked out each provided photo by hand. This was how the AI was “taught” the difference between books and A4 documents, business cards and ID’s, and so on.

It was decided to implement seven distinct sections for the most popular document types uploaded to FineScanner. This data was obtained by means of a questionnaire answered by ABBYY users.

According to testing results, the accuracy of classification is approximately 90 – 95%. But it depends on the quality of photos in your gallery.

ABBYY has also implemented a new text search feature. Now, all you have to do is input some text from the appropriate photo into the search bar and FineScanner will find that photo. This means that as long as you remember the text on your photo, you won’t even have to scroll through your gallery – simply enter the text into the search bar and FineScanner will display the search results and highlight the detected keywords.

You can also search through documents from a specific category (e.g. A4) by navigating to the appropriate document category folder and searching there. Doing so will restrict your search to that specific document type.

FineScanner needs to recognize the text on your gallery photos in advance in order to immediately display the results for later searches. This process is completely confidential and localized to your



smartphone - no data will be sent online whatsoever, so rest assured your data is secure.

However, first-time recognition will take a while. All in all, FineScanner will require anywhere from 5 to 20 minutes to sort and recognize your whole gallery (depending on your device hardware and number of photos). According to ABBYY research, more than half of all FineScanner users send the documents they create to their e-mail or messenger apps, which they do by either saving the documents on their PC or by printing them out.

In previous FineScanner versions, printing a document straight from the app would stretch out the image over the entire page, which was just not good enough. In the new iOS version of FineScanner, ABBYY has added a feature that allows you to measure the size of your documents using augmented reality. This tool will let you determine the size of your particular document (e.g. passport, driver’s license, business card) in order to correctly scale the document onto your printing paper.

FineScanner for Android or iOS is free to download.

Parascript unveils FormXtra.AI 8.0

Parascript has included new machine learning capabilities in FormXtra.AI 8.0, the latest version of its Intelligent Document Processing (IDP) platform.

Using new deep learning recognition (in addition to transcribing large blocks of handwritten information such as those in comments fields of all types of forms), Version 8.0 adds the power of NLP to transcribe entire pages of handwritten information - reading similar to a human with results that demonstrate the best performance in the industry.

Previous releases used results of page-level classification to derive document boundaries. With 8.0, separation is improved by using deep learning neural networks to review multiple page features including image, temporal context and page sections to identify logical document boundaries. The novel application of multiple areas of context means FormXtra.AI can automatically separate files into documents even where separation of two documents is required within a single page.

Complex semi-structured and unstructured documents often have important data that exists as a block or paragraph of text making it difficult to locate and extract all of the needed information without erroneously missing some portions of the text or including other unnecessary sections. With FormXtra.AI 8.0, a new sentence and paragraph context is added that simplifies these situations.

Using only labels such as "address," the surrounding areas can be analysed, and the entire address data can be located or all the data within specific paragraphs based on section titles can be located and extracted.

Parascript has added the ability for Smart Learning to automatically detect if a field is mostly static on a form or if it is randomly placed as in a semi-structured or unstructured document, lending much more adaptability and high-fidelity support of the variations of complex document-based information.

For those who want to add their own rules in addition to the auto-generated ones, FormXtra.AI 8.0 provides a user experience that makes blending the results of deep learning classifiers with additional rules a simple process.

In practice, these expanded capabilities have significant impact on complex IDP workflows. Examples of this can be seen in both mortgage automation and in healthcare insurance automation.

Loan Processing Optimization

Mortgage lenders can significantly accelerate their loan onboarding process. Using Parascript software, they can immediately validate the documents submitted by borrowers and ensure that a complete loan package complies with any number of stacking orders. The ability to verify the presence or absence of all the mandatory documents saves downstream process time.

In addition, lenders have a new automation option so that they can easily extract all the necessary information from these packages, validate the data and pass it downstream to all their applications without delays.

FormXtra.AI significantly reduces document processing times with high accuracy — simultaneously reducing the cost of quality control and avoiding the errors introduced by manual processes so that more documents can be processed each day.

Insurance: Moving Toward Interoperability

Using Parascript Smart Learning, FormXtra.AI can be trained on any document from medical charts to claims. The software identifies key characteristics of each individual medical record.

Different algorithms are often employed that evaluate various attributes such as presence of graphical information (e.g., logos), textual data (e.g., facility names and addresses), and even spatial information such as the distance between different dates on a page and use of specific language related to those dates.

All these attributes are then analysed to identify the most reliable way to identify and separate one document from another. Once separated, data extraction can then be employed with the final step being to employ Intelligent Capture to further identify specific patterns in the text.

In addition to accurately accessing and rapidly moving data through the enterprise systems, this data can reveal various problems and conditions not only with a single patient, but across a patient population.

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

ProntoForms adds new workflow capabilities

Low-code application platform ProntoForms has added a new Teamwork function that facilitates collaboration by allowing work-in-progress forms to be submitted and made available to other mobile users. These users can then continue executing the service event in a traceable way.

With ProntoForms Teamwork, technicians have a contextual view of what was completed by previous contributors. This ensures that productivity and quality is maintained - no matter how often projects are paused or switch hands.

Status and progress details are no longer blind spots for team leaders as work-in-progress forms can now be easily tracked, resulting in better service delivery and clearer customer communication.

Finally, ProntoForms Teamwork enhances ProntoForms' strong compliance and audit tracing with new, more precise insight into past service events with knowledge of which technician did what throughout the service process. By tracking

accountability across the organization, field teams can maintain a high-level of effectiveness and accuracy to meet stringent compliance requirements and generate standardized and credible reporting. ProntoForms Teamwork does this through a combination of capabilities:

- Drafted forms can be submitted to the cloud, ignoring constraints like required fields.
- Drafts can be submitted multiple times before a complete, fully validated record is sent to the ProntoForms cloud.
- Forms work across multiple device platforms (iOS, Android, W10).
- A version of the record is created with every submission, with technician tracking on each question to determine who answered what and when.
- A new option to generate interim report documents (PDF/Word) and route them through data destinations.
- Integration with work order management systems through a combination of mobile app-to-app and cloud-based data destinations.

Together, these capabilities enable organizations to more effectively complete field work with multiple layers of complexity and variability. Work that requires several contributors of various skill levels and expertise is now more efficient to execute.

<https://www.prontoforms.com>

Contract Intelligence with improved search

Cortical.io has announced a new release of its Contract Intelligence software. Utilising a patented natural language understanding (NLU) approach based on [semantic folding theory](#), the software analyses the content of large quantities of documents with a degree of accuracy that is difficult to achieve with manual labour or other automation tools.

It automatically and accurately searches, extracts, classifies and compares key information from agreements, contracts, and other unstructured documents like policies and financial reports. The Cortical.io Contract Intelligence solution understands the meaning of whole sentences and concepts, instead of just keywords.

"Other vendors offer contract review and analysis software, but are limited to pre-defined contract types. Cortical.io offers the capability to easily customize the extraction and classification to any type of document and to the specific corporate requirements with little training data," said Cortical.io COO Thomas Reinemer.

"Because it is meaning-based, the solution reaches higher levels of accuracy even when extracting whole sentences and paragraphs which makes it very reliable and provides efficiency and savings to our customers."

Cortical.io's newest Contract Intelligence version capabilities include high-fidelity rendering of documents, improved extraction capabilities and advanced search (i.e. the ability to perform range queries that allow you to search for numerical and date ranges).

Benefits include:

- Improved operational efficiency and money saved by reducing extraction and review time by up to 80%
- Faster turnaround by reducing extraction and review time
- Higher accuracy that reduces the cost of improperly reviewed documents (for example, coverage gaps in insurance policies, risks of not monitoring important provisions)

Pricing is based on annual volume of documents.

<https://www.cortical.io/solutions/contract-intelligence/>

AI-enhanced Ediscovery and Document Review

Lighthouse, a US developer of technology-enabled legal services, has announced the launch of Lighthouse Prism, a new in-house technology that uses AI and machine learning to radically improve document review legal processes.

Lighthouse Prism deploys big data analytics along with expert insights and unified workflow consulting to deliver scalable, lightning-speed ediscovery and document review, with the proven ability to save thousands of hours in review time and over \$US1 million in review costs on a single matter.

"Prism empowers organizations to reap even more value from the painstaking process of document review, illuminating connections and highlighting trends lying beneath the surface across their dockets," said E.J. Bastien, Director of Discovery Programs at Microsoft.

Lighthouse claims the current reality for many legal teams is inefficient and inconsistent document and privilege review that is expensive and time consuming.

Leveraging AI-powered analysis of text, metadata, and prior attorney work product, Lighthouse Prism identifies and removes duplicate data, makes recommendations to consistently code documents across matters, and provides valuable ediscovery insights to organizations while lowering risks and reducing time and costs.

A proof of concept conducted with a multinational pharmaceutical company demonstrated Lighthouse Prism's ability to remove 350,000 documents from review and reduce 15,000 hours of legal review, representing a savings of over \$US1 million in review costs with a 34-percent reduction on a single matter.

<https://lighthouseglobal.com/>

ibml launches Cloud Capture platform

ibml has announced the launch of a cloud-native SaaS platform which enables enterprises to intelligently capture, process and manage content from any source using an on-demand scalable 'pay for what you need' pricing model based on document volumes and features used.

The new ibml Cloud Capture platform is designed to provide document process automation in one single modern unified environment, enabling customers to accelerate digital transformation by simplifying data capture from numerous business systems. Flexibility is also provided by enabling remote work to happen in a secure environment.

ibml promotes Cloud Capture as a way for enterprises to escape from the historical lock-in of traditional capture and ECM systems characterised by high total cost of ownership with content and metadata mixed with proprietary APIs and databases.

The company promises Cloud Capture takes days to implement, customers own their data, no proprietary formats are required, and integration is therefore seamless with any line of business application. The platform helps drive digital transformation by handling all types of forms and documents including unstructured, semi-structured and structured content and allowing scalability as required.

Susheel John, ibml's vice president of marketing and strategy, explains, "This could be because of the seasonal nature of a business, a specific discrete campaign or in response to the economic climate. With a Cloud Native system like ibml Cloud Capture, there's no IT infrastructure requirement, no complex software updates, licencing limitations or integration challenges and customer instances can be scaled on demand when more compute and storage is required thereby generating faster ROI."

ibml Cloud Capture also addresses other challenges associated with data capture such as manual processes leading to data inaccuracies which can result in missed SLAs, possible financial penalties and – worst case - even customer loss.

ibml Cloud Capture is a standalone capture solution meaning it is scanner agnostic and supports hardware from other OEMs that offer industry standard TWAIN drivers. It also enables organizations to automate document handling processes using the built-in machine learning and Robotic Process Automation technologies within the platform.

ibml Cloud Capture comprises three core services to make deploying information capture and management – using the cloud – quick and easy:

- **Capture services.** Any information from any source – emails, faxes, online forms, scanned data – can be captured, ingested, classified and data extracted using machine learning. The ibml Cloud Capture system 'learns' based on content handled and historical tagging to make this a super-fast, accurate and reliable process, reducing the need for human intervention.

- **Process services.** Robotic Process Automation [RPA] - one of the fastest growing areas in the global enterprise software market - is used within ibml Cloud Capture to automate the mundane, repetitive and error prone tasks involved with data entry typically done by humans. RPA also aids the integration of legacy business systems - and getting data into them - without the need for complex APIs to be written as well as for driving and integrating with BPM tools.

- **Content services.** Integral to ibml Cloud Capture are the content management features which allow the secure storage and retrieval of any content in a Microsoft repository such as SharePoint or Azure Blob storage.

Where firms use Microsoft Azure, Microsoft 365 or SharePoint - which most organizations now do - ibml Cloud Capture leverages this investment and connects seamlessly providing the ability to search, find and view straight from ibml Cloud Capture. This allows documents to be retrieved quickly based on tagged document data. It also enables users to effortlessly sort and filter document data and dynamically edit and share it with others. ibml Cloud Capture can also integrate with other legacy ECM systems.

Martin Birch, President and CEO of ibml said, "ibml Cloud Capture has been architected so that all the data and documents reside on the customers own on-premise or cloud infrastructure and only pass through the ibml platform for processing, which ensures our customers data is always secure and that they have complete control."

ibml Cloud Capture is available today based on a 'pay for what you need' annual subscription model given the volume of documents processed and the features used within the platform.

<https://www.ibml.com/products/software/ibml-cloud-capture/>

callas software offers PDF toolset for free

callas software, a provider of automated PDF quality assurance and archiving solutions, has added eight free tools to the desktop versions of its products pdfaPilot and pdfToolbox. These tools provide users with detailed insights into PDF files, including their internal structure, the fonts and metadata used, and any DPart or tagging structures in place.

They can even extract barcodes and QR codes, and the "test mode" makes it possible to validate pdfToolbox profiles.

"Our new tools provide experienced users and developers with a wide range of information about PDF files that make them easier to process," explained Dietrich von Seggern, Managing Director at callas software. "We invite interested parties to download free test versions of pdfaPilot Desktop and pdfToolbox Desktop."

The tools are:

- **Explore PDF** - This function provides an insight into the internal structure of a file, offering a variety of views that reveal features like the content stream or resources like fonts, ICC profiles and more. Among other applications, the tool is useful for hunting down invalid PDF files.

- **Explore Fonts** - Complementing "Explore PDF", this tool lets users analyze embedded fonts, including

their internal encoding or glyphs.

- **Explore Metadata** - This tool can be used to output or export both the metadata within a PDF document and the metadata related to any images the document contains.

- **Explore Layers** - The layer explorer shows a list of all layers within the document, as well as their visibility setting. It also supports metadata in line with the ISO standard on processing steps.

- **Explore Tagging** - This tool visualizes a file's internal tagging structure and elements like headings, paragraphs or image captions.

- **Explore DPart** - This viewer identifies all DPart information that applies to pages or page regions, making it easier to set up automatic DPart-based processes.

- **Extract Barcode** - By analysing barcodes and QR codes, this tool delivers both the encoded data and any parameters that are relevant for printing, such as bar width reduction and module width.

- **Test Mode** - This tool lets users test, improve and export any pdfToolbox profile using any test file. However, if the user does not have a license, the output PDF file will no longer be available once Test Mode is closed.

Those interested in learning more can download the test versions of pdfaPilot and pdfToolbox from callas software's website.

<https://www.callassoftware.com/en/>

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upflow.com.au/PSICapture



Outbound document management for SMBs

Quadient has announced the general availability of Quadient Impress version 1.2, an upgrade of the multichannel outbound document management platform that automates the customer communication workflow for small and medium businesses (SMBs).

Quadient Impress version 1.2 includes architecture upgrades throughout the cloud-based platform that speed the task of preparing and sending customer communications on-site or remotely with greater scalability and enhanced security.

Among the upgraded features, a notable improvement is the expansion of Quadient Impress Distribute that enables users to send digital communications through SMS/text, Impress Portal (a customized branded, secure web portal) and a new, tracked email service.

Additional upgrades include:

- Better visibility – User-friendly dynamic dashboards that provide greater visibility into details on the status of customer communications;
- User empowerment capabilities – The ability to assign specific roles that allow access to certain communication jobs and various delivery channels;
- Stronger control – The ability to set approval requirements for specific jobs before they are distributed;
- Accountability options – The creation of cost centres from a drop-down menu that makes it easy to charge back to specific departments the costs associated with sending communications to customers; and
- Reusability – Central storage for communication assets, such as logos and email templates.

<https://www.quadient.com/en-AU/>

Fastman Now Available on SAP App Center

Fastman has announced that three of its flagship products are now available for online purchase on SAP App Center, the digital marketplace for SAP partner offerings.

These products are designed for businesses using SAP Extended Enterprise Content Management (SAP Extended ECM) by OpenText that are interested in the efficient management of their business content and information.

Fastman solutions work with SAP ECM by OpenText for SAP S/4HANA, SAP Extended ECM by OpenText, add-on for capital projects and operations, and SAP SuccessFactors Extended ECM by OpenText.

Fastman's offerings include:

- Fastman Permissions Management Suite for SAP Extended ECM by OpenText - Managing

permissions for access to information and content from SAP Extended ECM by OpenText is an important component in the information access of an electronic document management system. Fastman Permissions Management Suite helps companies in managing access with confidence, identifying, addressing, and doing audits on potential information leaks that could otherwise damage their business.

■ Fastman Data Transformation Hub for SAP Extended ECM by OpenText - It enables businesses to automate long and drawn-out data management activities such as record management, data migration, content updates, and move without the risk and tedium associated with manual processes. Fastman Data Transformation Hub is a flexible and cost-effective API to import and bulk update files and metadata, managing moves, and updates for enterprise content.

■ Fastman Digital Signature Connector for SAP Extended ECM by OpenText - This advanced digital signing solution will streamline your validation and approval processes directly within the SAP Extended ECM by OpenText user interface; you can sign and approve documents remotely and from anywhere within your repository in just a few clicks. Fastman is a DocuSign Silver Partner and the Fastman Digital Signature Connector is an off-the-shelf extension providing advanced capability to DocuSign content from SAP Extended ECM by OpenText in the cloud or on-premise.

<https://www.sapappcenter.com/en/search/Fastman>

Tackle Vision promises document understanding

Tackle Ai has announced Tackle Vision, promising a revolutionary method for full document data detection within the Tackle Ai artificial intelligence platform. Tackle Vision is a new way to detect all types of dynamic data found on unstructured documents.

The company says Tackle Vision offers businesses with massive amounts of unstructured documents a system to quickly and accurately extract this data better than ever done before.

“The development of Tackle Vision has been a large undertaking for the Tackle Ai team but we believe it is something that will change the artificial intelligence and data detection industries. Tackle Vision works in conjunction with our other proprietary neural networks which separates this system from everything else on the market,” said Sergio Suarez Jr., CTO, and Co-Founder of Tackle Ai.

“Tackle Vision is so much more than just a new optical character recognition (OCR) tool. Tackle Vision can fully understand everything that is found on a document, not just letters and numerical-based characters.

“Our new system will know if a document has been

signed or not, if the document has any press stamps or other unique markings added, and it will identify if any handwritten notes are within the document along with what the note says. Tackle Vision is truly able to understand and identify all parts of a document just like a human would be able to do so with their eyes.”

Features and benefits of Tackle Vision include:

- Up to 35% more accurate than the traditional methods of OCR and ICR
- No need for zoning of documents
- The ability to detect dynamic data on any type of unstructured document, even on documents that Tackle Vision has never ‘seen’ or been trained on before
- The overall time to introduce and process a new document can be optimized by up to 1,200% compared to the traditional methods of OCR and ICR

A commercialized version of Tackle Vision is available now and additional development will continue on the system to further improve its data detection, speed, and accuracy.

<http://www.tackleai.com>

Free DPart metadata viewer for Acrobat

callas software, a provider of automated PDF quality assurance and archiving solutions, has released callas pdfDPartner, an Adobe Acrobat plugin used to view DPart metadata in PDF documents.

The viewer identifies all DPart information that relates to pages or page regions within a PDF, making it easier to set up automatic DPart-based processes. The plugin is available to download for free from callas software's website.

“DPart metadata was originally specified for the PDF/VT standard, which is used for variable printing,” explained Dietrich von Seggern, Managing Director at callas software.

“It is now also defined as part of the PDF 2.0 standard. DPart metadata makes it possible to divide PDF files consisting of multiple parts into data sets, and then to process such files automatically.

“One typical example would be PDF files containing multiple invoices addressed to various recipients, with varying page counts.”

When developing DPart-compliant software and processes, it is essential to be able to analyze the metadata interactively.

No viewer capable of performing this task previously existed, but callas software is convinced of the potential for page-based automated PDF processing, so it developed this Adobe Acrobat plugin which supports all PDF files containing DPart structures. The DPart metadata can even be exported to a JSON file for further analysis and workflow modelling.

Download it from www.callassoftware.com for free.

ProcessMaker adds Formstack integration

ProcessMaker has announced a new integration with Formstack which allows Formstack Forms to be utilized out-of-the-box inside ProcessMaker Process Applications. The new integration is designed to benefit Formstack users that want to build sophisticated workflow applications using their Formstack Forms, and ProcessMaker users that may prefer to use native Formstack Forms for the user interface in ProcessMaker applications.

Enterprise organizations use hundreds to thousands of forms: travel authorization request forms, employee onboarding/offboarding forms, change request forms, purchase order forms, credit request forms - the list goes on.

Most standalone web forms are perfect for collecting data and perhaps pushing it to another system. However, many organizations use forms as part of larger workflows that span systems (such as SAP and Salesforce) and people across the organization that need to review and/or approve forms.

Furthermore, some forms need to be handled in a time-sensitive matter based on Service Level Agreements (SLAs) and generate automatic escalations if those SLAs are not met.

The new integration between Formstack and ProcessMaker brings the full power of the ProcessMaker workflow engine to the Formstack ecosystem.

<https://www.formstack.com/integrations/processmaker>

Contract comparison in compareDocs Cloud

DocMinder from Word-Tech, which automates contract submittal, markup, and approval processes, now integrates with compareDocs Cloud. This will allow DocMinder users to compare multiple versions of documents and manage changes as part of a more efficient approval process.

DocMinder provides Contract and Project Managers with automatic oversight of business procedures, from task assignment to drag-and-drop workflows, team checklists, through to project completion.

Users can send documents out for review, automatically track their progress, and review the updated document upon return. compareDocs Cloud will automatically mark up any changes. Users can accept/reject changes and update all parties of the changes in an easy-to-read Comparison Report.

DocMinder integrates with compareDocs Cloud through an API. It is a highly scalable RESTful API designed to support volume comparisons for large enterprises. Developers can embed it into their applications using their preferred technology and can connect to it from anywhere.

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

APPS & APPLIANCES

SAP adds Low-Code/No-Code Tools

ERP giant SAP has announced new low-code/no-code tools and three complementary and integrated process automation tools, which address different skill levels and automation scenarios.

SAP Cloud Platform Workflow Management allows developers and business experts to gain end-to-end process visibility, and to configure and automate enterprise workflows in a low-code approach. SAP Cloud Platform Workflow Management includes new predefined content packages and integration with Experience Management solutions from SAP and Qualtrics, combining operational and experience data. The SAP Ruum solution allows business users with no coding skills to create departmental processes in hours instead of days and weeks. About 50 SAP customers and partners, including German chemical company Evonik Industries AG, U.S. company Varian Medical Systems Inc. and Norwegian furniture maker Ekornes Ltd., have already joined the beta program for SAP Ruum.

"With SAP Ruum, Ekornes was able to model the process in about an hour, without requiring a lengthy project with resources from our central team," said James Fogarty, an Ekornes business operations analyst.

SAP Intelligent Robotic Process Automation (RPA) 2.0 technology targets developers looking to automate repetitive, manual tasks with software bots. SAP Intelligent RPA includes prebuilt bot templates to drive efficiencies with SAP S/4HANA and 12 lines of business. Beginning January 2021, SAP plans to include a limited edition of SAP Intelligent RPA in every SAP S/4HANA Cloud subscription.

SAP in 2021 plans to offer developers a free tier model for SAP Cloud Platform, the integration and extension solution for SAP Business Technology Platform. The free tier model will provide users access to learn, develop and implement integrations and extensions in one account. It removes current time restrictions and allows users to transfer projects to production without the need to rebuild content. As an intermediary step toward the free tier model, SAP recently extended its current SAP Cloud Platform trial offering from three to 12 months.

"SAP Business Technology Platform is key for our customers to integrate and extend their SAP applications and to enable future business," said Juergen Mueller, chief technology officer and member of the SAP Executive Board.

"As the cornerstone of SAP's own transformation and accelerated shift to the cloud, it helps to provide value to customers with a seamless technology experience, a robust ecosystem and greater development efficiency. The ongoing innovation to SAP Business Technology Platform underscores our commitment to the developer community and the entire ecosystem of customers and partners, and shows we are not only listening but also acting on what we hear."

Appian moves into Hyperautomation

Appian has announced the latest version of the Low-code Automation Platform which aims to unify robotic process automation (RPA), artificial intelligence (AI), and process automation. This is accomplished through Appian's patented SAIL technology, allowing users to compose and unite all components of an enterprise application, from back-end integrations to interface. The latest version also enhances Appian's out-of-the-box AI-enabled Intelligent Document Processing (IDP). IDP saves thousands of person-hours per year by eliminating manual form and business document intake, using AI to convert unstructured data into structured data without human intervention.

The latest release also leverages Appian's Data Anywhere architecture to unite the entire modern workforce of bots, AI, and people with enterprise data - without requiring any data migration.

Forrester predicts that by the end of 2021, 75% of application development will use low-code platforms, up from 44% in 2020.

"Through the course of 2020, the urgency for fast and powerful process automation became undeniable as organization struggled with the distributed workforces, broken processes, and inaccessible data brought by the COVID-19 pandemic," said Michael Beckley, Founder and Chief Technology Officer at Appian. "Our new platform release delivers the unified automation technologies and the development speed that define the new world of hyperautomation. The result is smarter, faster, more resilient companies."

New enhancements in the latest release include:

- Rapid process and task automation
- Record processes and turn them into bots fast
- Create bots that interact with websites and cloud services easily in low-code
- Form and paper automation with native intelligent document processing (IDP)
- Use AI to classify and extract data from documents without sending data to the cloud
- Integrate and build applications without migrating data
- Quickly build unified data views with no-code integrations that now support web services
- Cache data from connected sources to improve app performance
- 360-degree application health dashboard for developers
- Centrally monitor application performance and security alerts
- Identify application design issues and gain intelligent design improvement recommendations

A free trial is available at <https://www.appian.com/platform/free-trial/>.

Control Email Workflows from the Cloud

Maintaining full control over the multifaceted email communication channel, with all its intricacies, is becoming more complex every day. This not only applies to the high-performance routing required within company networks. Critical business issues such as process automation are also becoming increasingly difficult to cover with standardized solutions. Companies need more control over incoming email traffic, ideally before the messages are delivered to the company's own infrastructure. To meet this challenge, Munich-based cloud services provider Retarus has developed the new Predelivery Logic service.

Retarus Predelivery Logic analyses emails in accordance with customer-defined specific rule sets, redirects and optimizes them if necessary, and only then forwards them to the company's infrastructure. The service allows IT managers to control, organize, redirect, or adapt all incoming email traffic based on rules they have defined themselves.

These rules, each consisting of conditions and actions, can be combined in flexible ways to enable a virtually unlimited number of operational scenarios, irrespective of whether the company is running its own email infrastructure on premises or using a cloud service.

Retarus Predelivery Logic makes it possible to specify

how emails should be processed, based on their content or language. This means that messages sent to the support team or contact centre can be presorted automatically and routed to the correct department in the appropriate country.

Similarly, the service makes it possible to process emails automatically in accordance with the rule sets that have been put in place, such as to rewrite email addresses or to add keywords to subject lines. Retarus Predelivery Logic provides substantially more functionality than a basic policy engine and enables the automation of critical business processes.

"These days, when we speak to our large enterprise customers in the course of ongoing projects, the feedback they give us leaves no doubt: overcoming the challenges posed by [email's] ever-increasing complexity, requires an intelligent, flexible approach. Especially for the migration of their email communication into the cloud," says Martin Hager, founder and CEO of Retarus.

"Businesses want to have more control over inbound email traffic as early in the process as possible. Ideally, they would like to apply rules even before the messages are delivered to their own infrastructure. Once the email is on the company's own servers, applications or even in the users' inboxes, it is often too late to put many of their policies and guidelines into practice."

<https://www.retarus.com>

Driving Digital Transformation in the New Zealand Workplace.

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upsol.co.nz



Tape still leads the way for backup and archive

By Eric Polet, Spectra Logic

Today, we are on the cusp of a data storage and management revolution. Whilst organizations are looking to increase agility via the optimization of data management for rapid retrieval, remote collaboration and eventual monetization to drive greater business value, they are concurrently grappling with the inherent challenges of massive data growth and the complexity of legacy systems.

Since up to 80% of data is typically stored on the wrong tier of storage, greater data control and IT efficiencies are achieved by cost-effectively storing and protecting data on the most suitable tier for the long-term. Therefore, choosing the right storage solution (or balance of solutions) for both active and inactive data is vital, and must be decided upon by weighing various economic, performance, accessibility and protection capabilities of each solution.

Despite some outdated perceptions, tape technology is a key player in fulfilling all of these criteria when it comes to storing inactive data. Tape has proven to be the cost leader in backup and archive for years and that is not changing anytime soon. With significant capacity advancements with every new tape generation, the cost per gigabyte of tape storage continues to decrease, meaning even rapidly growing environments where data growth often outpaces budgets can harness the advantages of tape for backup and archive. Here are some major reasons why implementing tape technology as a part of an overall data storage strategy for backup and archive should be considered:

Cheaper than cloud

One of the most important factors when deciding on a storage option is the total cost of ownership (TCO). Tape's TCO is fairly predictable, with the greatest expense being the initial tape library. So how does tape technology compare to some of the cloud-based archiving options on the market today? The reality is that all on-premise storage is more affordable than cloud storage for long-term use. Cloud's greatest cost advantage is that it is billed monthly as an operational expense, which translates into a very low cost of acquisition when compared to the greater upfront investment required to purchase tape hardware.

The key to a comprehensive cost analysis is to evaluate the total solution, how long data needs to be kept and how much data will be stored over time. When data capacity is high and moderate retention periods are in place, the cost of cloud quickly adds up. It is not the storing of data per se that is expensive on the cloud, but rather the high cost to move it and access it (egress charges).

Tape's greater capacity roadmap



The economies of tape become evident when it comes to scale. With the majority of digital assets consisting of inactive files, the costs for organizations to keep spinning disk running to store that data are high. Tape serves as a virtually infinite and highly economical storage repository for large, unstructured data. In our big data world, tape outpaces disk, with significant financial advantages in storing data for long periods of time.

For example, disk drives have reached maximum capacity, providing 99 square inches of recordable space per drive. To achieve greater storage capacity, disk manufacturers have been forced to create new methods of recording (shingled, heat, helium filled), but limitations are still a major hurdle.

As an alternative, LTO (Linear Tape-Open) is an adaptable and scalable industry standard open tape format that helps address the ever-increasing demands of data protection. LTO delivers secure and reliable long-term archival data storage at substantially lower cost than disk, flash or cloud, especially when factoring in considerations such as retrieval, power and cooling - making it a vital part of today's storage infrastructure.

The latest ninth generation of LTO exceeds the per-cartridge capacity of its LTO-8 predecessor by 50 percent with 18TB native capacity. The most recent LTO roadmap lays out LTO technology's predicted future per-cartridge capacities, with LTO-10 achieving up to 36TB native; LTO-11 up to 72TB native, and LTO-12 up to 144TB native, demonstrating that users

will benefit from the lowest cost per gigabyte for tape storage.

As each future generation of tape technology is released, customers can expect continual storage capacity increases. Despite growing data sets, tape technology design enables end users to either maintain a similar footprint or possibly shrink the footprint by upgrading to new tape generations.

Tape storage hits exabyte milestone

As of September 2020, the boundaries of tape technology have been further advanced with the news that by leveraging LTO-9 tape technology, the world's largest tape library storage system now stores an industry-first exabyte (one million terabytes) of uncompressed data. With LTO-9 tape technology, and a maximum of 144 drives in this system, up to 207.4TB (518TB compressed) of data can be transferred per hour. This provides optimum storage density, scalability, reliability and affordability in the smallest footprint of any enterprise-class tape library.

Unsurpassed longevity and durability

Hard disk drives traditionally have a life of three to five years. Bare disk drives could last for even shorter periods with their unpredictability, and if they are stored outside of any kind of data monitoring system, the data could be inaccessible without the end user knowing it. When stored properly, tape media can last up to 30 years. Tape-based storage offers superior durability over traditional disk-based storage and most any modern storage medium. Furthermore, tape cartridges can be ejected and transported to any location in the world for safe keeping or disaster recovery.

Depending upon its size and an organization's individual goals, tape can be leveraged to complement other storage media such as disk, object storage or cloud for a more cost-effective, manageable and secure storage strategy to suit requirements.

Significant technology advancements have been made in terms of tape's data retrieval speed and the ability to seek and read multiple files. The backup and archiving of immense volumes of digital assets is an enormous undertaking, so the deployment of tape for data-hungry industries such as high performance computing, scientific research, media and entertainment, cloud storage, education, healthcare, finance and traditional IT, has been purposefully chosen as not only the most reliable medium, but also the fastest.

Despite some perceptions, tape can transfer data at remarkably rapid rates, outpacing disk - while being highly scalable. And tape performance can be enhanced through expansion frames and the seamless installation of tape library upgrades.

For example, a 24-drive tape library can write 60TB of data per hour (or 1PB in less than a day / 10PB per week), whereas with cloud, there are limitations in terms of the control and flexibility of archiving speed. How fast data can be downloaded is reliant upon an organization's bandwidth. 60TB of data archived to the cloud with a 1GB per second bandwidth would

take six days or with the more typical 250 MB per second connection, it could take about 25 days to transfer that data to the cloud. The recall and restore times from cloud can be an extensive process.

Protection from cyberattacks

Most tape cartridges typically reside in robotic tape library slots or in manually accessed media storage racks, meaning they are online only when the tape cartridge is mounted on the drive. The offline nature of tape inherently defines the "tape air gap" and has become a critical component of a robust data protection strategy to confront cybercrime, such as ransomware - rampant in these days of COVID.

An air gap is an electronically disconnected or isolated copy of data that prevents cybercrime from attacking an organization's backup, archive or other data. Without an electronic connection or pathway to tape (or any other type of offline media), files stored on tape cannot be hacked, encrypted, or deleted, meaning organizations do not have to pay hefty bitcoin ransoms.

Background migration

Two common points raised against tape technology is the migration process to new tape generations and the perception that tape has limited backwards compatibility. To put these claims into perspective, firstly, while migrating to new tape technology is something that can benefit customers dealing with growing data sets, there is no requirement to migrate data to the newest tape technology as soon as it is made available.

Migrations should happen when it is best for the organization, be it for capacity reasons, to save money by improving density, performance increases or other feature changes. LTO tape technology can be supported through to the LTO-4 generation, which was released in 2007. If this same data was stored on disk, it would have had to be migrated two to four times by now given the three to five-year life of HDDs. With support of LTO-4, this data on tape still would not have to be migrated.

Moreover, new generations of tape technology can be purchased and implemented without data migration. The new tapes can simply be placed into a new library partition to which all new data can be written; any older data needing to be restored can be accessed with the older drives. In a backup environment, the older drives and media will expire with no migration necessary. In an archive environment, migrations are not required, but have become much easier with the assistance of other software and hardware packages.

So, given the many benefits of tape and its noteworthy advancements, it is high time outmoded perceptions were brought up to date. As we rapidly shift into a future where increasing numbers of organizations are seeking to utilize data as an economic asset, robust storage capabilities need to be put in place. And as a flexible, reliable, high-performing, safe and cost-effective long-term data storage solution, tape is the perfect contender for providing a solid foundation in helping organizations to achieve this goal.

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