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APRIL-MAY 2021

NAA'S DEATH
BY A THOUSAND
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REASONS CAPTURE
TECHNOLOGY IS
DRIVING DIGITAL
TRANSFORMATION



How to establish good information management policies

The Four Lies Destroying Records Management

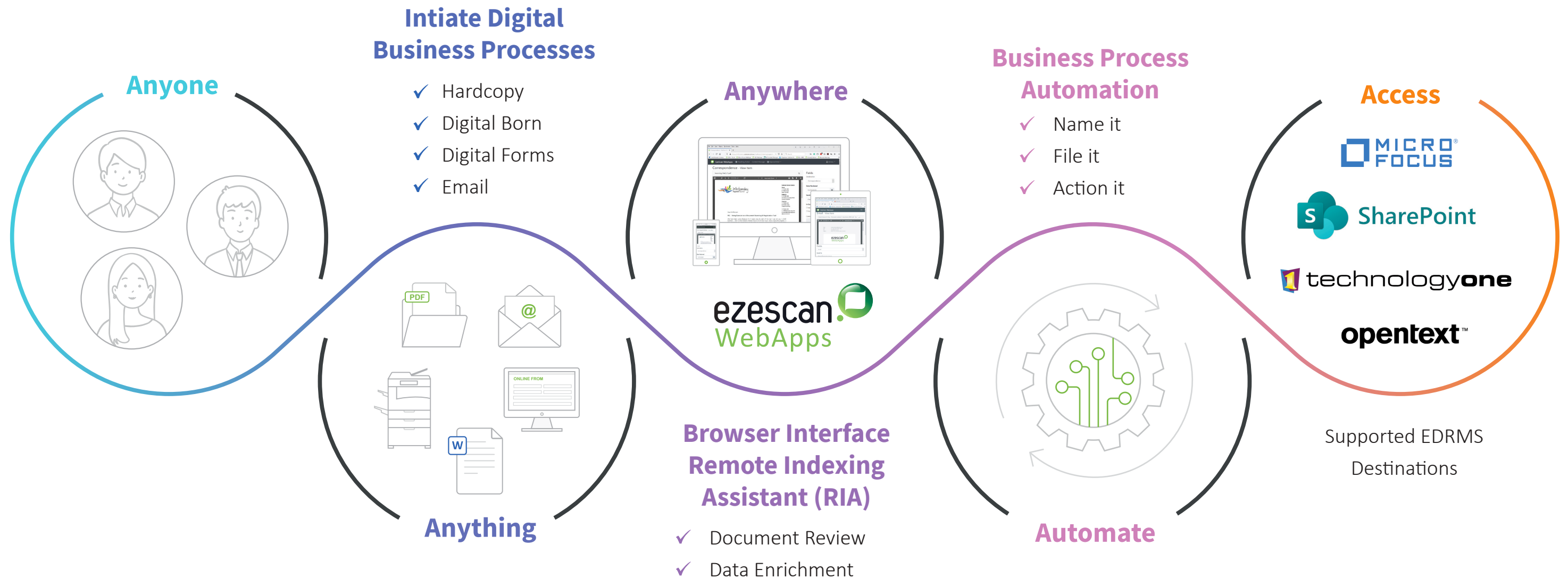
A safer way to manage the information explosion in Teams

Top Security &
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Report

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Automation

A new approach to records capture



Automatically align information capture with your business processes

Litera acquires DocsCorp

US legal technology developer Litera has announced the acquisition of Australia's DocsCorp and its suite of software and services for document professionals who use enterprise content management systems.

Both Litera and DocsCorp have developed legal workflow and workspace technology. But each also provides unique products for document drafting and management. For example, DocsCorp provides PDF editing and electronic binder creation, while Litera provides proofreading, litigation and transaction tools.

Since launching more than 25 years ago as Microsystems, Litera has grown through a series of regular acquisitions that have expanded its software suite for drafting, proofreading, comparing, repairing and cleaning documents in the legal and life sciences industries.

"We are very pleased to announce this important acquisition for Litera. DocsCorp is a business with a proven track record in the development of integrated solutions for the legal sector," said Avaneesh Marwaha, CEO of Litera. "We constantly listen to our clients to understand their needs and they expect us to drive digital transformation for legal teams through a comprehensive, unified desktop experience. This acquisition delivers on that expectation."

"The combination of Litera and DocsCorp joins two highly respected brands in the industry to deliver a robust suite of document drafting capabilities within one organization," said Dean Sappey, DocsCorp CEO and Co-Founder. "This transaction extends Litera's range of software technologies, enhancing its offering to the benefit of customers."

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

Insentra adds Archive360

Managed and Professional Services provider Insentra will distribute Archive360's Archive2Azure platform exclusively across A/NZ adding to its growing ISV portfolio which already includes IGEL, Nulia and Torsion Information Security.

"Archive360 is seeing growing demand for its products from organisations across the A/NZ region," said

Insentra CEO, Ronnie Altit. "Leveraging Insentra's proven archive migration experience, our knowledge of the Microsoft ecosystem and Azure, plus our 100% channel only model makes us a logical choice to distribute their Archive2Azure solution," he said.

Archive360's PaaS platform is trusted by organisations around the world to securely migrate their digital data to the cloud, and responsibly manage it for today's regulatory, legal and business intelligence obligations.

Users achieve this by applying context around the search, classification, and analysis of structured and unstructured data - including files, videos, audio, CRM, ERP, emails/electronic communication, social media - while maintaining full control over security, privacy, access, and compliance.

"The Archive360 and Insentra partnership is a powerful combination allowing us to drive greater business impact for our partners and their customers in Australia and New Zealand," said Bob Desteno, CEO of Archive360.

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

M-Files acquires Hubshare

M-Files has acquired the French company Hubshare - which also has offices in Sydney and Hong Kong - to strengthen external content sharing and collaboration.

Hubshare offers a secure digital workplace portal that enhances user and client engagement through collaborative working, secure file sharing, and project management.

"The Hubshare acquisition helps us deliver a unique digital client experience and better serve knowledge worker industries such as professional services, where information sharing and external collaboration are critical requirements," said Antti Nivala, founder and CEO at M-Files.

While the M-Files user experience is optimized for streamlining internal document management processes, the new Hubshare hub in M-Files provides key information such as documents, people, processes, discussions and more to external users, such as clients, via a branded portal.

<https://www.m-files.com/>



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DTA launches new Cloud Marketplace

The Digital Transformation Authority (DTA) has launched a new Cloud Marketplace for Australian Commonwealth government agencies that includes more than 300 providers. The Cloud Marketplace replaces the Cloud Services Panel, which expired on 31 March 2021. The DTA says its Cloud Consulting category lets buyers access cloud-based professional services using a simple rate-card system that gives buyers greater flexibility in how those services are used. The Cloud Services category includes various ICT capabilities offered under 'as a service' delivery models. To promote a common approach and ease of access, descriptions of cloud services align with the International Standard ISO/IEC 17788. The list of solution providers and software suppliers includes a number that specialise in information and records management:

- AVEVA;
- I cognition;
- Information;
- Objective Corporation;
- Prometix;
- Recordpoint Software;
- Technology One; and
- The Citadel Group.

Buyers can access the new Cloud Marketplace, as well as our other panels and marketplaces, through the DTA's [ICT Procurement Portal](#).

EncompaaS welcomes ISO/IEC certification

Australian software developer EncompaaS and global provider of a cloud-based compliance platform automating governance of on-premises, cloud and application information repositories, has welcomed its certification to the ISO/IEC 27001:2013 standard.

This specifies the requirements for establishing, implementing, maintaining and continually improving an information security management system within the context of the organization. It also includes requirements for the assessment and treatment of information security risks.

"The EncompaaS team have successfully completed the rigorous assessment requirements to gain this certification, proof of our commitment to delivering a world class and secure cloud-based compliance platform for Government and Regulated Industries", said Jesse Todd, CEO.

David Gould, Chief Customer Officer at EncompaaS, said, "Crossing the ISO 27001 bridge is an important step for us, but more important, gives our customers the piece of mind that we have their security interests in mind as they begin to roll out EncompaaS to discover, analyse and manage content and conversations in Teams and other repositories where mission critical business content is stored.

For more information contact enquiries@encompaaS.cloud

Civica and Zipporah unite for A/NZ councils

Civica, which offers the cloud-optimised enterprise solution, Authority, to a large number of councils in Australia and New Zealand, is working with Zipporah to integrate the facilities bookings platform Impact+.

Councils using Authority and Impact+ bookings management will receive the benefits of a single solution that includes management of complex charging structures and bookings with multiple dependencies.

Zipporah's Impact+, a multi-site browser-based solution with accessibility for all types of users, both internal and external, offers real-time visibility of bookings, variable charging levels and document upload options. Impact+ also offers a depth of functional control, and is designed with user-experience in mind.

Automation Anywhere teams with Google Cloud

Google Cloud has partnered with Automation Anywhere to enable customers to enable intelligent automation capabilities to automate repetitive business tasks for thousands of applications without needing an API. The move comes after Microsoft, IBM and Amazon sealed strategic acquisitions and partnerships to introduce intelligent automation tools in their respective stacks.

With this partnership, Automation Anywhere's Automation 360 platform will be available on Google Cloud, and the two companies will mutually develop AI- and RPA-powered solutions.

Through this collaboration, Google Cloud will also integrate Automation Anywhere's RPA capabilities with services such as Apigee, Appsheet, and AI Platform, enabling customers to scale the application of automation with API management, low- or no-code development, or the development of ML workflows.

IANZ & e-ImageData

Imaging Australia New Zealand (IANZ) has announced a partnership with e-ImageData Corporation to provide the company's cutting-edge microfilm scanners to its customers throughout Australia and New Zealand that utilize archival scanning.

IANZ provides imaging and digitisation procurement solutions and microfilm conversion services. In addition, via its partners, IANZ is able to offer book scanning equipment and high-speed document scanning equipment, servicing both Australia and New Zealand.

"We are thrilled to be working alongside e-ImageData to provide our clients across Australia and the New Zealand region with a powerful microfilm tool. From our initial conversations, we could clearly see similarities in our customer base and the industries with which we serve, it was a unanimous decision," said Mark Petts, Imaging Australia New Zealand Managing Director.

e-ImageData's patented ScanPro product line offers versatile and affordable microfilm scanning, that can deliver both fast lookups and high-performance conversion scanning for all film types. The ScanPro ships with a 3-year factory warranty

<https://ianz.com.au/>

ABBYY Launches No-Code Platform Vantage 2 and AI Marketplace

ABBYY has announced the launch of Vantage 2, a low-code/no-code platform that delivers cognitive skills for RPA robots, automation systems, chatbots, and mobile solutions, enabling organizations to gain insights from documents and content.

The company believes a shortage of IT resources and inadequate worker skills **are the main challenges** of adopting Intelligent Document Processing – a foundational step in digital transformation.

This highlights the need for low-code platforms that enable a wider range of business users to contribute to transformation initiatives (democratization of automation).

ABBYY Vantage 2 is a cloud-native platform for Intelligent Document Processing built on microservices and packaged into containers orchestrated by Kubernetes.

Its cloud-first architecture and low-code/no-code interface are designed to make AI-enabled skills (robot capabilities, similar to Amazon Alexa skills) easy to adopt and consume within the enterprise.

The company has also launched ABBYY Marketplace, an open marketplace where organizations can discover, try, and purchase reusable AI skills to accelerate their automation initiatives, while partners can build and publish skills to automate all types of content-centric processes.

Blue Prism, Cognigy, EXL, Kryon, Micro Focus, NICE, Pegasystems, PwC, and RoboRana are already integrating Vantage 2 with their platforms.

Out-of-the-box connectors developed by ABBYY are available for Alteryx, Blue Prism, and UiPath.

ABBYY Vantage 2 empowers citizen developers to have more control within intelligent automation initiatives.

The platform drives change across the entire organization by enabling business users to digitize operations faster without complete reliance on IT: with Vantage, they can derive critical insights from documents on a large scale.

Through empowering individual users, Vantage allows business leaders to accelerate automation strategies, improve customer experience, lower risk, and increase productivity.

The new ABBYY Marketplace provides an extensive online collection of reusable technology assets including cognitive skills for classification of documents and data extraction, ready-to-go process flows, and pre-built connectors.

With more enterprises interested in the try-and-buy method, the Marketplace offers pre-trained skills

for all types of documents like invoices, purchase orders, receipts, loan documents, insurance claims, bills of lading, and more. ABBYY partners also can contribute new skills and other technology assets to the Marketplace or utilize ready-to-deploy assets to speed up automation projects.

"We see a new kind of business user within enterprises today, looking for a faster way to consume and leverage data contained within documents.

"Their goals can be achieved through AI-enabled, easily consumable, ready-to-use technology we call skills," added Bruce Orcutt, SVP Product Marketing at ABBYY.

"Vantage 2 delivers a completely redesigned user experience that revolutionizes the way AI-enabled skills are created, trained, and published. The fast learning curve that comes with the platform makes it easy to apply the technology across many business functions and automation systems.

"Additionally, users will find many pre-trained skills in the ABBYY Marketplace that enable popular RPA tools, BPM systems, and conversational AI chatbots, to understand the most complex documents.

"Vantage 2 and the Marketplace are designed to unlock opportunities for true business transformation."

The Vantage 2 is designed to connect seamlessly with other intelligent automation platforms, like RPA or BPM, and line of business applications, including ERP systems.

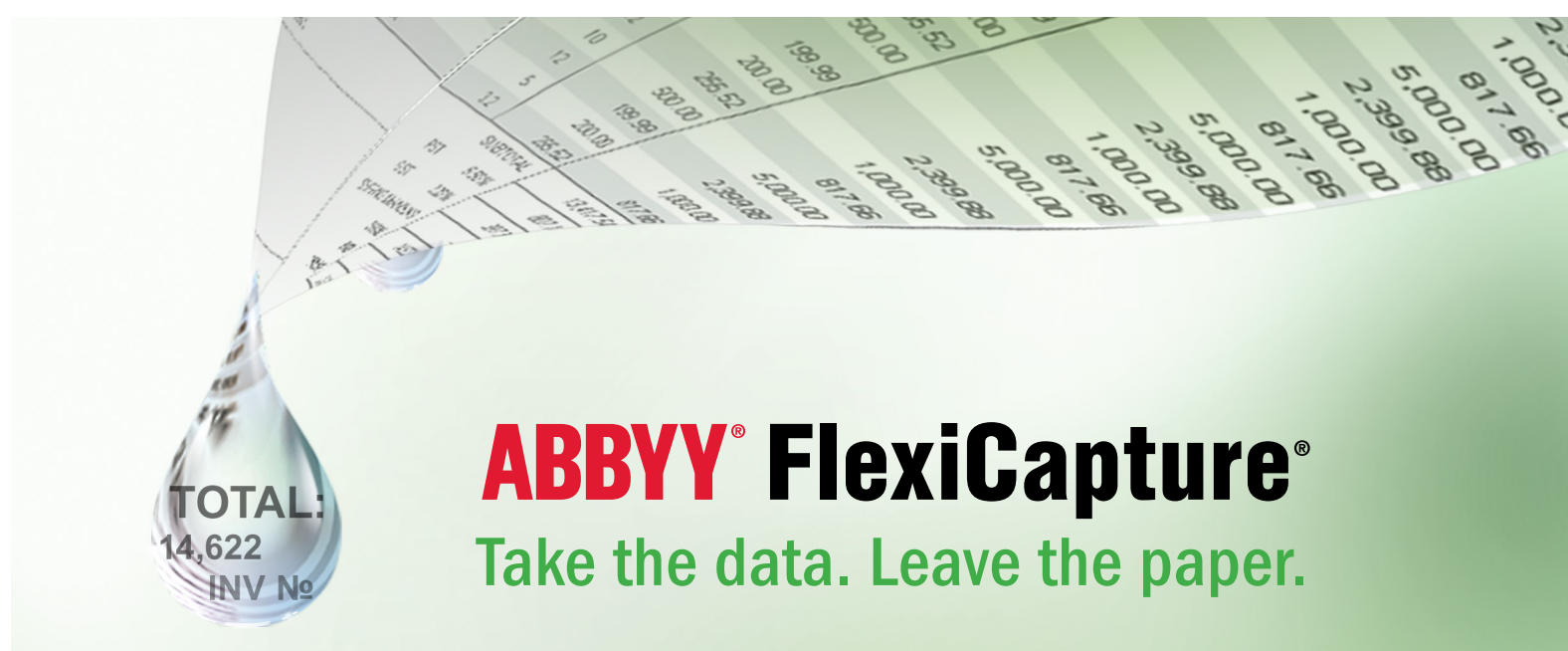
Vantage powers a new breed of software to understand and process documents in the same way that humans do. Its combination of pre-trained neural networks and online machine learning delivers the recognition of unstructured data quickly adapting to changing input and generating an accurate, reliable result.

ABBYY Vantage 2 is available now to early adopter customers and partners. It can be purchased directly through ABBYY or via a global network of partners including RPA vendors, strategic system integrators, and consulting firms.

To learn more about ABBYY Vantage 2, visit www.abby.com/vantage.

To learn more about ABBYY Marketplace, visit www.abby.com/marketplace

ABBYY's full suite of Digital Intelligence solutions can be found at www.abby.com/solutions/digital-intelligence.



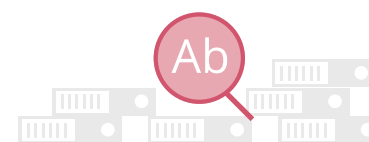
ABBYY® FlexiCapture®
Take the data. Leave the paper.

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



Mobile Capture

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



Document Archiving

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



Accounts Payable Automation

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



Mailroom Automation

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



Document Classification

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



Forms Processing

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

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

A safer way to manage the information explosion in Microsoft Teams

By Sean Burgess

I don't think many will disagree when I say that the last 12 months have been a challenge for everyone, both personally and professionally. Whether it be managing a new working from home environment, no face-to-face meetings or interaction, home schooling or ripping up and re-writing IT strategies, it's been a huge learning curve.

A client said to me this week that a lot of their time in early 2020 was spent emptying the shelves of laptops in a well-known high street computer retailer to enable their staff to work from home.

I shuddered at the challenges the business will have faced to ensure everyone was secure and compliant in such an outlier of a time. However, it seems like we're all running towards the final hurdle now, although from the conversations I'm having with organisations there is a huge lean towards a hybrid workforce from now on, which will bring its own challenges around information explosion.

I decided during the lockdown that I was going to make my life a little tougher... Firstly, our second son joined us right in the middle of the first lockdown and now we've decided to move house.

I was on the phone last week with a telco organisation, planning a smooth transition of our internet connectivity to the new house. During the setup we got on to how customer service representatives are handling high volumes of differing engagements when not in the office.

The representative I spoke to was talking to me about how of course she misses the buzz, the camaraderie and the fun of being in an office, but also described how they were having to adapt their work to communicate through Microsoft Teams and the organisation was seeing a huge increase in the sharing of information and content.

This is challenging for a number of reasons, not only that responses can take longer with customers and managing those expectations, but how can a business keep control of the information that is being shared within those Teams conversations and channels?

Thousands of calls per day, a plethora of documents, some sensitive, some perhaps not so much, but organisations are going to need to stretch that Data Governance strategy and place the microscope above their Teams environment to ensure that information is where it should be, especially when Teams usage is being used for back end discussion outside of customer service tools. And that's not to mention SharePoint, OneDrive and other collaboration platforms, where content may have been on premise and moved to the cloud, without any real governance attached.

This reflects the conversations I'm having every day - "Teams is the Wild West right now" and "OneDrive is beginning to cause us a big problem, we don't know what's in it" are two quotes that stick in my

mind. It's every sector too, from financial services to pharmaceuticals, customers are concerned about how to manage this explosion of information. As of October 2020, there are now **115 million active daily users** of Teams and in Q3 2020, Microsoft 365 users around the world generated more than **30 billion collaboration minutes** in a single day.

Like any issue, a rip in your jeans or a drip in the bathroom, there's no perfect time to fix, but the sooner you act to solve that problem, the less the damage. Putting stringent document policies in place for M365 content now will work to prevent serious information and governance headaches down the line, but the big challenge is that the burden of managing the lifecycle of documents shouldn't lie with the end user.

Individuals should be able to focus on their day-to-day role without the concern within leadership teams that the data end users are creating and handling could cause a compliance challenge to the business - or worse they are totally oblivious to the risks.

A great idea would be to federate the governance of information sources, allowing an organisation to centrally manage policies through a single pane of glass. That would enable the business to classify and manage information in place (if required) with a single tool, creating a frictionless approach to managing records.

That's where EncompaaS can help. Our SaaS compliance platform provides intelligent, automated governance across content sources and application services, provisioned and discovered in hours.

By creating a bridge from on-premise applications to cloud (and cloud to cloud), EncompaaS allows you to Discover the who, what, when, where and why of your content, Understand the risks to the business and the opportunities for improvement, as well as Manage and Execute classification and retention policies.

This gives leaders the peace of mind that they have the knowledge of where their data lives, the confidence that they have the correct policies in place using AI and Machine Learning techniques and the ability to report findings and progress to senior stakeholders or regulators. Autoclassification enables existing records and governance staff to supervise many business systems, knowing record-keeping and regulatory obligations are automatically enforced.

With an estimate that **80% of information within an organisation is now unstructured** and Microsoft Teams users now touching 115 million, the time to apply governance and management to Teams content is now.

Automatically apply policies to protect information during its lifecycle, report and prove to regulators that your plan is operationalised, transparent and always 'on', avoid risks and fines and reduce change management for staff, by removing the governance burden. With EncompaaS, your critical information is classified, managed and enriched..... Let's get more from Teams without the risk!

Sean Burgess is an Account Executive at EncompaaS - De-risking digital strategies with expertise in Content Management, Information Governance and Automation.



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.



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3 signs you should consider incorporating crowdsourced data entry

by **Torsten Malchow, ScaleHub**

For all the incredible technological leaps and bounds we've made in the past few decades, we haven't been able to bypass the need to transfer information from a document, image, or video to a software system. The task of data entry remains a thorn in the side of any organisation that solves business challenges with technology.

The reason data entry is such a stubborn challenge is that it can, for the most part, be automated, but it still requires human intervention.

Manual data entry is slow and prone to errors, and automated methods such as OCR consume employee time and attention to resolve exceptions. Sound familiar?

This is precisely why more and more organisations are turning to crowdsourcing for data entry.

By combining the best of human ingenuity and technology, a crowdsourcing solution can offer accuracy, speed, and data privacy that other data entry methods have not reached.

Today, the best of technology is artificial intelligence (AI), and it can be applied throughout the crowdsourcing process to incorporate human work in the most effective way possible.

Wondering if crowdsourcing could solve your data entry woes? Here are three signs your organisation should

consider incorporating crowdsourced data entry:

1. Bad data is a big deal

All businesses collect data of some kind, and more and more organisations are putting that collected data to use.

In a [2019 Deloitte survey](#), 49% of respondents reported that data helps them make better decisions, 16% said it better enables key strategic initiatives, and 10% said it helps them improve relationships with customers and business partners.

But if you've ever performed or overseen data entry work, you know very well how many errors make their way in. We touched on this [in a recent blog post](#), but the impact of bad data on the bottom line is real ([Gartner](#) found that the average annual cost of poor data quality to an organisation is \$US15 million).

Think of the implications of bad data for a medical prescription processor, for example, or a BPO with service-level agreements for data accuracy.

The right crowdsourcing solution will plug AI in along the data entry process in the steps where errors are typically introduced.

To prepare data that will be sent to the crowd, for example, we can apply AI to an incoming document to understand a) what kind of a document it is: (Receipt? Invoice? Insurance claim? Prescription?).

And then b) what specific information to take from that document.

Using AI for data preparation in this way ensures crowd contributors only receive correctly classified and extracted information.

2. Your automation rates aren't where you want them to be

Automated document or business case classification, automated data extraction, RPA, OCR - solutions such as these have changed a lot about the way businesses process documents.

Yet each has its limitations; for example, the need for employee involvement for exception handling or to train algorithms.

These limitations often hold organisations back from an even mostly automated operation, as well as from the scalability that automation was supposed to deliver.

The truth is that there are tasks that we simply need people for, or for which the best possible way to do the task is by an employee.

So, instead of focusing on full automation as the holy grail, it's better to focus on accuracy and speed/scale. If you can find a solution that delivers both, then what does automation rate matter?

Rather than trying to take people out of the equation, a solution like ScaleHub uses AI to better automate the steps of a process that can be automated, and to organise the "human work" in a way that ensures scalability and accuracy (in the case of ScaleHub, that accuracy rate is above 99%).

3. Your data volumes fluctuate, and you can't quickly scale

It's simple math. Whether you manage data entry 100% manually or with the help of an automation solution, people must be involved in some capacity.

If the volume of your data fluctuates for any reason, you have to either hire or divert resources in order to get the data processed in a timely fashion.

This is where crowdsourcing truly shines. Snippetting - cutting a document into individual pieces of data and removing the data from context - is key to the remarkable turnaround crowdsourcing can offer.

When one document (or image or video) becomes a collection of snippets, those snippets can be sent out to crowd contributors simultaneously.

In other words, rather than one person working his or her way through a document, crowdsourcing deploys individual pieces of a document to numerous crowd contributors, who simultaneously key in what they see in the snippet using an intuitive web interface.

This is how crowdsourcing solutions such as ScaleHub have brought truly limitless scalability to data entry.

At ScaleHub, we harness the power of crowdsourcing and put it to tasks like data entry with a crowd network of 2.3 million people.

Watch this [short video](#) to learn more about how crowdsourcing data entry works.

[Torsten Malchow](#) is Chief Revenue Officer at ScaleHub <https://www.scalehub.com/>

Fusion makes Content Manager integration simple

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

Now you can with **Fusion** an integration engine specifically for Content Manager that makes it easier to connect your business systems.

- Simplify integration management
- Improve user experience with automation
- Reduce risk by capturing critical content

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EzeScan CLOUD offers affordable invoice data capture for Technology One CiA

EzeScan has introduced a specialised Invoice Data Capture Solution, that provides 'out of the box' native integration with TechnologyOne Financials CiA, designed to take the hard work out of accounts payable processing.

Now available as a SaaS offering in the EzeScan CLOUD, (in addition to private cloud or on-premise deployment) this provides an option for fast deployment with an affordable monthly subscription, without the software, hardware or management headaches. The solution is PEPPOL-enabled and will also support e-invoicing.

EzeScan CLOUD is operating in the Amazon Web Services (AWS) cloud.

EzeScan Support & Services Manager Fabian De Angelis said, "Developing a proper SaaS offering that exploits all of the sophisticated capabilities embedded in AWS required extensive research & development from our team. This ensures that security (which is our number one priority) is fully covered by deploying as many of the AWS capabilities.

"The good news is that from all of this work, all we need is access to an Office365 inbox and connectivity to the TechnologyOne environment and we can have an invoice automation platform up and running within 45 minutes. The solution also provides further integration using TechnologyOne CiA "web services". Whilst an optional module from TechnologyOne it can provide customers with much more automation.

"Invoices that arrive email attachments are processed straight through to the sophisticated workflow capabilities into TechnologyOne CiA. EzeScan software also provides the ability to split multiple invoices that arrive as a single PDF and even combine supporting information attachment with its corresponding invoice.

"In today's world most invoices are born digital and arrive directly from a customer's ERP system, although we can implement an EzeScan client on-premise if required to scan paper invoices. For really low volumes of hardcopy invoices a multifunction device with scan to email will also do the job," said De Angelis.

Pricing options for the SaaS offering begin at \$A500 per month for less than 5000 invoices a year.

EzeScan smart capture technology allows EzeScan to automatically detect values from any location on an invoice. These values can be validated against TechnologyOne to ensure data integrity is maintained and exceptions are flagged.

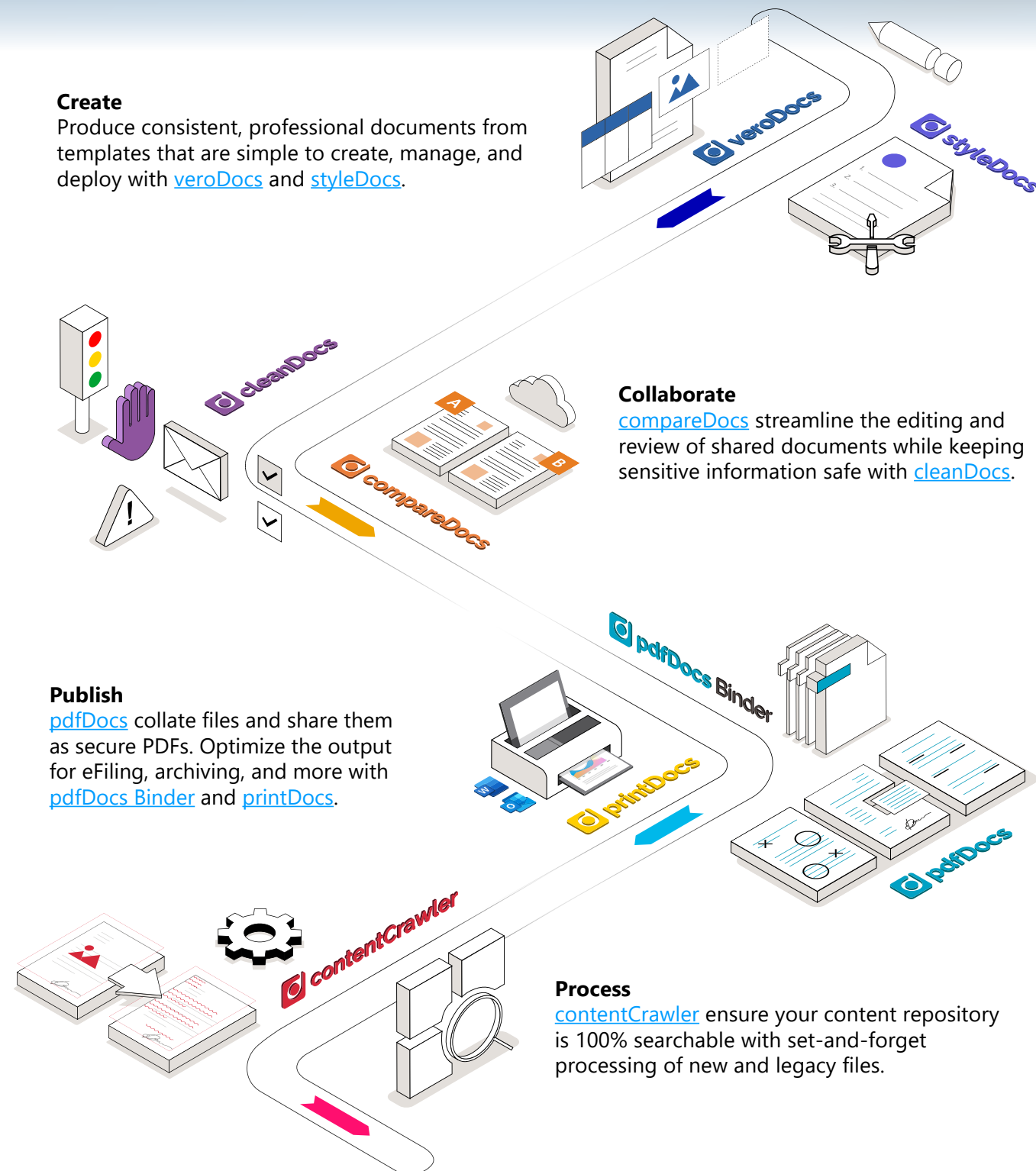
Automation includes the capture of emailed invoices from Office 365 mailboxes, invoice scanning, data capture, validation and upload to TechnologyOne.

Features of EzeScan CLOUD include:

- Automatically capture and process invoices from multiple sources including email, E-Invoice or scanned hardcopy, directly to TechnologyOne.
- Multiple exception rules are able to be applied, e.g. Invalid supplier, invalid or no order number, duplicate invoice, bank details mismatch, invoice not addressed to the business.
- Process support order, non-order, credit notes and sundry transactions.
- Upload invoices as document file transactions in TechnologyOne with the PDF linked.
- Submit invoices via a webform with supporting documentation reporting, including what was imported, processed and operator activity.

For further information about EzeScan CLOUD contact EzeScan T: 1300 EZESCAN (1300 393 722) E: sales@ezescan.com.au W: www.ezescan.com.au

Your document journey starts and ends with the right software.



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NAA's death by a thousand cuts

The National Archives of Australia (NAA) is facing substantial challenges primarily caused by shrinking financial resources over the past 5 years, according to a major review submitted to the Attorney-General in January 2020, which has just been publicly released. The government has said it is considering the report which found there has been there has been a 16% staff reduction at the NAA between 2014-15 and 2019-20.

David Tune AO PSM undertook the review, also known as the Tune Review, which has recommended "increased investment to address important areas such as IT and cyber-security upgrades to stay contemporary in the digital age, to digitise and preserve important records, to ensure quicker access for the release of records to the public and, with agencies to enable policy development, better decision-making and better service delivery."

The review supports additional funding for the NAA, with priority given to the 5th Generation Digital Archive and an ongoing boost to the digitisation of records.

The report also recommends the establishment of a new Government Information Management Model (GIMM), with the NAA having responsibility for information management across Australian Government agencies.

Analysis by consultant firm Deloitte has suggested this proposal would save the government around \$A142 million through "efficiencies in information management staff (after taking account of redundancy costs)" and \$A48 million in overall storage savings through the earlier sentencing of physical records.

The Tune Report concludes that while the NAA's mandate to set and enforce information standards across government is clear, the authority requires

greater clarity.

"To enable these outcomes, the *Archives Act 1983* needs updating, with adoption of a new National Archives Bill. The Act is pre-digital and requires modernisation to meet the rapid and ever-evolving challenges of the digital world, support the transformation of government and government business, and achieve efficiencies both for the National Archives and across all Australian Government agencies."

The deterioration of many physical records held in the NAA's archive is highlighted as an issue of immediate concern with the report noting that many records will be lost if action is not taken.

"As such, the National Archives could potentially be in breach of Part 5 Section 24 of the Act due to unauthorised loss of records."

Other major issues noted by the report include:

- The inability to respond to requests for records within the period defined in the Act.
- A requirement for stronger cyber security measures
- The need for a secure 5th Generation Digital Archive (5thGDA) for Australian Government information estimated to require \$A93.8 million over four years.

The review received 104 submissions, with authorisation received to make public and publish 86 submissions on the review's web pages at <https://www.naa.gov.au/about-us/tune-review/public-submissions-tune-review>.

The other 18 submissions were received with requests for confidentiality, including four submissions received from government agencies involved in declassification and release of their records.

The report notes "Funding and resourcing levels of the National Archives was the single greatest concern identified, with submissions noting the flow-on effects on the functions and resulting reductions in National

Archives staffing.

"Access to records, including backlogs and delays, and need for greater description of records was the next most significant issue for users."

The Tune report found that the information management environment in Australian federal government is "fractured and duplicated, with a focus on data as a separate concept to information and records."

"Since 2013 five out of seven royal commissions have highlighted poor information management practice across government and the private sector. One-quarter of all Commonwealth Ombudsman investigations in 2018 found information management was deficient and did not support good decision making.

"The Australian National Audit Office (ANAO) identified information management deficiencies in more than a third of all audits undertaken in 2016-17 alone."

The report sheets home much of the blame for these failings to the "laborious task" of developing records authorities for the creation and disposal of information which must be done by agencies themselves.

It highlights the current information management arrangement which involves a complicated information flow with numerous manual processes, limited connectivity and access backlogs. It is further characterised by:

- Increasing volume of record creation
- Manual transfer of records
- Lack of sentencing completed by agencies
- Multiple ingestion points
- Unnecessary storage of records; and
- Description and transference often overlooked by government entities.

"The National Archives is working with the private sector through the Australian Government's Business Research and Innovation Initiative, to develop a new solution to records authorities using Artificial Intelligence and machine learning, for "automating complex determinations for Australian Government Information".

It is anticipated this will enable improved processes for developing and maintaining RAs."

A proposal to implement a new Government Information Management Model (GIMM) would radically alter the current structure of current government record-keeping practices.

"Under the model, around 63 per cent (approximately the largest 20 agencies) of the 1,000 staff employed by agencies on records and information management (source: National Archives Check-Up PLUS surveys), would transfer to National Archives to undertake these functions in line with the Archives standards, policies and legislative requirements.

These staff would largely remain in their existing agencies but be employees of the NAA. Whole-of-government efficiencies would be achieved through economies of scale, with the new approach phased in over a number of years. In addition, the new model is expected to lead to significantly better records management practices across government.

"A further benefit is that these staff could focus on the earlier sentencing of records (as appropriate), thereby addressing concerns about timing between the creation of records and the decisions related to their retention, which increases unnecessary storage costs."

The report found the NAA suffers a skills gap in the areas of data analytics, understanding data structures and formats, ability to select and apply appropriate technological solutions, knowledge of e-discovery, and digital forensics.

"The lack of these skills poses risks for archival functions such as transferring digital records from agencies, examining digital records for sensitive information, and selecting the best delivery channels for digital data."

It notes that recruiting people with digital skills is difficult because the National Archives must compete with other agencies with higher pay rates.

As well as Australian state and territory archives and records authorities, the Tune review consulted with international bodies such as the National Archives of the United Kingdom and US National Archives and Records Administration (NARA).

"The National Archives of Australia in comparison with its peers, was found to be dealing with common challenges including in the areas of transition from paper to digital, digital information policies, and agency digital transformation.

"Funding pressures, storage capacity, demand for digitisation, preservation of at-risk collections, and declassification challenges were also in common with the experiences in the UK and the US. Both institutions have also experienced budget reductions and loss of staff."

The full report is available at <https://www.ag.gov.au/rights-and-protections/publications/tune-review>



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OF AUSTRALIA

58 percent of Data Backups are Failing: Report

Data protection challenges are undermining organizations' abilities to execute Digital Transformation (DX) initiatives globally, according to the Veeam Data Protection Report 2021, which has found that 58% of backups fail, leaving data unprotected.

The report found that against the backdrop of COVID-19 and ensuing economic uncertainty, which 40% of CXOs cite as the biggest threat to their organization's DX in the next 12 months, inadequate data protection and the challenges to business continuity posed by the pandemic are hindering organizations' initiatives to transform.

More than 3,000 IT decision makers at global enterprises were surveyed to understand their approaches to data protection and data management. The study examines how organizations expect to be prepared for the IT challenges they face, including reacting to demand changes and interruptions in service, global influences (such as COVID-19), and more aspirational goals of IT modernization and DX.

"Over the past 12 months, CXOs across the globe have faced a unique set of challenges around how to ensure data remains protected in a highly diverse, operational landscape," said Danny Allan, Chief Technology Officer and Senior Vice President of Product Strategy at Veeam.

"In response to the pandemic, we have seen organizations accelerate DX initiatives by years and months in order to stay in business. However, the way data is managed and protected continues to undermine them. Businesses are being held back by legacy IT and outdated data protection capabilities, as well as the time and money invested in responding to the most urgent challenges posed by COVID-19. Until these inadequacies are addressed, genuine transformation will continue to evade organizations."

Respondents stated that their data protection capabilities are unable to keep pace with the DX demands of their organization, posing a threat to business continuity, potentially leading to severe consequences for both business reputation and performance.

Despite the integral role backup plays in modern data protection, 14% of all data is not backed up at all and 58% of recoveries fail, leaving businesses' data unprotected and irretrievable in the event of an outage by cyberattack.

Furthermore, unexpected outages are common, with 95% of organizations experiencing them in the last 12 months; and with one in four servers having at least one unexpected outage in the prior

year, the impact of downtime and data loss is experienced all too frequently. Crucially, businesses are seeing this hit their bottom line, with more than half of CXOs saying this can lead to a loss of confidence towards their organization from customers, employees, and stakeholders.

"There are two main reasons for the lack of backup and restore success: Backups are ending with errors or are overrunning the allocated backup window, and secondly, restorations are failing to deliver their required SLAs," said Allan.

"Simply put, if a backup fails, the data remains unprotected, which is a huge concern for businesses given that the impacts of data loss and unplanned downtime span from customer backlash to reduced corporate share prices. Further compounding this challenge is the fact that the digital threat landscape is evolving at an exponential rate.

"The result is an unquestionable gap between the data protection capabilities of businesses versus their DX needs. It is urgent that this shortfall is addressed given the pressure on organizations to accelerate their use of cloud-based technologies to serve customers in the digital economy."

CXOs are aware of the need to adopt a cloud-first approach and change the way IT is delivered in response to the digital acceleration brought about by COVID-19. Many have already done so, with 91% increasing their cloud services usage in the first months of the pandemic, and the majority will continue to do so, with 60% planning to add more cloud services to their IT delivery strategy.

However, while businesses recognize the need to accelerate their DX journeys over the next 12 months, 40% acknowledge that economic uncertainty poses a threat to their DX initiatives.

As organizations increasingly adopt modern IT services at rapid pace, inadequate data protection capabilities and resources will lead to DX initiatives faltering, even failing. CXOs already feel the impact, with 30% admitting that their DX initiatives have slowed or halted in the past 12 months.

The impediments to transformation are multi-faceted, including IT teams being too focused on maintaining operations during the pandemic (53%), a dependency on legacy IT systems (51%) and a lack of IT staff skills to implement new technology (49%).

Veeam commissioned market research company Vanson Bourne to conduct a survey of 3,000 IT decision makers (at organizations with more than 1,000 employees) from 28 countries.

<https://www.veeam.com/wp-2021-data-protection-trends.html>



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How QBE Leveraged AI To Transform Claims Operations with CLARA Analytics

By David Bacon, General Manager, QBE

Australia is home to a well-developed [workers' compensation system](#). Each state determines the design of its scheme, with some being privately underwritten by insurers and others being state-run schemes. Claims across territories vary by industry, injury and complexity. As such, insurers need systems that can enable quality, efficient handling of claims to facilitate the health of injured parties and get them back to work as quickly as possible.

Approximately three years ago, QBE's Australia Pacific division, like many other insurers, was running what we would describe as a "process-compliant business" when it came to workers' comp claims. Leadership wanted to do more to eliminate manual processes and take advantage of claims adjusters' expertise to get the best result for customers and their employees. They knew technology was the key.

Three Core Issues

QBE had long valued the principle of getting the right claim to the right claims adjuster based on areas of expertise. But to spot complexities early, claims teams engaged in what I refer to as our manual triage system. Expert adjusters did a cursory look at claims as soon as they were lodged in order to identify potential risks based on very simple criteria — was the employee missing work. Simply put, we needed a better way to get claims routed and assessed from the earliest stages.

Our leadership team also wanted to figure out how to lighten adjuster caseload. As is common across the industry, adjusters may handle as many as 70-80 claims at a time. With this volume, it was incredibly difficult to spot the more complex or problematic claims, the ones that require the most attention. QBE was seeking a tool that could surface this information quickly and easily.

Additionally, the team was committed to identifying a better way to conduct quality reviews. Instead of manually selecting which claims to examine, which is very time-consuming, we wanted to add artificial intelligence to the mix.

AI Intrigue

As QBE prepared to set its strategic initiatives for the next few years, data analytics was prioritized. With more detailed information, adjusters and leadership could make better decisions about how to route claims, what required attention, and how to ensure efficient, positive resolution.

At first, we considered building a solution in-house but quickly realized that it would take a considerable amount of time and staff resources to construct a system that mapped to our priorities. We started engaging with many of the big data and analytics consultancies, hopeful that they would be able to help. They didn't fit the bill either. In my time with them, all they were able to show me was that they were interested in billing day rate work and that they might be able to solve a very narrow slice of a problem in a way that tends not to be scalable or actionable.

I knew there had to be a better way. In the summer of 2017, I happened to run across an article about CLARA Analytics and how it was applying machine learning to

workers' comp claims. The approach, which leverages artificial intelligence (AI) to identify claim issues and keep them from escalating while helping to close simple claims faster, made sense, but would it prove to be all talk?

As soon as I examined how the models worked and how the software visualizes workload allocation, I recognized that it was the way we wanted to run our business, and they had a sizeable lead over what QBE could build themselves in terms of accuracy.

Clear Benefits

The first step of our collaboration was to install CLARA Claims software at QBE. While some employees were initially a little wary, it was essential to have a clean, easy-to-use interface that made the software seem less intimidating. The accuracy of its models not only saved countless hours of manual work but made decision-making significantly easier.

Once we started to peel away some of the changes and got past people's reluctance to AI, they started to understand how an AI system could make their jobs easier. Then they became motivated by it, which is quite lovely to see and beneficial for our organization, customers and injured workers.

The financial benefits associated with an adoption of such software have been significant. The initial reports estimate that product integration will easily deliver a 5:1 return on investment, which is a conservative estimate, particularly as this ratio applies to QBE's workers' comp portfolio.

QBE has been able to implement a more focused approach to quality assurance. Gone are the random selections of claims. Instead, we take the lead from this new system, which provides a much higher level of confidence that the review team is looking into the claims that need it most.

It is our belief that quality assurance shouldn't be driven by art; it should be driven by analytics, which is exactly what we've been able to accomplish together.

In addition to the new-found efficiencies and claim insights, we have enjoyed the competitive differentiation provided to our sales team. They love being able to showcase how QBE uses industry-leading technology to improve claims operations at multiple levels.

Our partnership has allowed us to enhance the software's capabilities to create significant advancements for our industry. For example, several months ago, both companies started collecting perception data from each injured person's claim, such as how they feel about their recovery. Today, we are able to collect and analyse that information at scale.

People have been talking about psychosocial flags for injury recovery for more than 20 years, and no one has solved it until now. We have been able to do this because we've worked closely together as a team. Taking in extra data points and using them in a different way or thinking about a problem from another perspective has been key to making better decisions about how to route claims, what required attention, and how to ensure an efficient, positive resolution.

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Over half of Banking Royal Commission recommendations not yet implemented

Australian banks are fast-tracking the implementation of customer engagement strategies to make up for lost time, as over 50% of the recommendations made by the Royal Banking Commission had not yet been implemented as of early 2021. This finding was revealed in the second edition of the Fintech and Digital Banking 2025 (Asia Pacific) IDC InfoBrief, commissioned by Backbase.

Digital banking fitness has been the key factor in the resiliency of financial institutions and being able to recover from pandemic-related setbacks. The InfoBrief highlighted that digital banks across Asia Pacific (APAC) enjoyed three times the growth in customer bases in 2020/2019, compared to traditional banks. Incumbent banks have also had to accommodate at least a 50% growth in the quantity of digital customer transactions and interactions. It is expected that organizations will reinvigorate digital transformation initiatives and undertake a comprehensive realignment of customer engagement projects.

Incumbents and new entrants alike will be jockeying for market share, and will look to compete on the basis of being digital-first. While the APAC banking landscape saw the departure of some neo banks and fintechs due to COVID-19 challenges, we will still see 100 new challengers across the region by 2025, according to IDC.

With new challengers presenting stronger post-pandemic propositions, there will be at least two digital banks in every APAC market that will pose a significant challenge to incumbents. That said, 80% of banking assets in Australia will still be owned by the Big 4. While some challengers saw earlier market share wins, these successes were not sustained.

Some fintechs that had gained sufficient size by 2019 also found success, gaining more market share than expected. Fintech categories that have typically shown success include payments, wealth advisory, alternative data, lending platforms, and account origination.

Traditional banks double down on digital

Meanwhile, traditional banks are increasingly focused on responding to changing consumer behaviours. By 2025, 20% of customers' retail transactions are expected to be conducted through mobile, with 90% of Australia customers "open" to mobile transactions. Indeed, digital banks across APAC saw three times the growth in their customer bases compared to traditional banks in 2020/2019.

Innovation initiatives are expected to re-accelerate in 2021 and will most likely have a higher chance

of success as banks restructure their agile and DevOps teams. 50% of Tier 1 banks already have agile frameworks in place. Investments in digital channels have paid off: banks have growing strength to acquire new customers, expand share of wallet, and push more products.

44% of the top 250 banks in APAC will leverage platforms with componentised modernization and API-enablement. Technology spending on governance, risk, and compliance saw double-digit growth in 2020/2019, while other areas of investment lagged behind.

Growth priorities for 2025

One result of the economic downturn is a more humanistic type of customer centricity, as banks needed to communicate with customers in empathetic, trustworthy and reliable ways that are complemented by digital innovations.

There has been an increased integration of human agents into customer engagement strategies, as contact centres saw surges in usage. The latest edition of Fintech and Digital Banking 2025 (APAC) found that 60% of banks in Asia Pacific will leverage artificial intelligence (AI) or machine learning (ML) technologies for data-driven decisions, compared to 48% from the previous year. In Australia, the use of AI for customer management is expected to increase revenue in retail banks by 20%, and in wealth management by 15%.

A back-to-basics trend has also overtaken the need for new revenue sources. Banks in Australia – including challengers and incumbents – will focus on the basics of origination and servicing on core products such as deposits and loans. Similarly, banks across the APAC region will be focusing on digitalizing their core business of lending with some focus, subsequently, on deposits.

New capabilities will be acquired from fintech partners: IDC predicts by the middle of 2021, 50% of lending decisions in retail banking will be supported by fintech propositions, underscoring accelerating bank-fintech collaboration.

Regional Vice President for Backbase, Australia & New Zealand, Malcolm Macnaughtan, said: "It is clear from this report that the shockwaves sent by COVID-19 throughout the banking and fintech landscape in Australia and the wider APAC region will continue to be felt for years to come. Australian banks will need to develop modern architectural foundations that enable them to aggregate customer data to develop hyper-personalized customer experiences."

This study, based on IDC Financial Insights' review of digital banking strategies of 65 banks from key Asia/Pacific markets, was conducted in 4Q2020-1Q2021.

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How to do more with your existing tech to boost productivity at home

By Caitlin Burns, DocsCorp Content Manager

One of the best ways to be more productive is to take advantage of the technology already at your fingertips. Because it's easy to fall into a routine with technology and use it the way you always have, it's easy to miss new or improved features added to the application over time. Unless we understand how different features can help us today, we're unlikely to learn how to use them.

In 2021, we're working from home, in the office, or both. Remote working is not without its challenges. Fortunately, [your existing technology can help with that](#), too. Read on to learn more.

Embrace the workhorse that is your PDF editor

Your PDF editor is a multi-purpose tool with dozens of time-saving features. Sure, you're already using it to convert Office documents into PDF. But it can do so much more.

Paperless editing and review

Digitally editing a PDF means you skip the time-consuming steps of printing and scanning a hard copy you've marked up. It also eliminates the time collaborators might spend deciphering small or hurried handwriting.

There are multiple tools in your PDF editor that make paperless review and collaboration more efficient.

You can type comments or notes in the document. Or strikeout the existing text and write your suggestion next to it. Highlight sections that need to be reworded or moved and easily add new pages or remove others. You can even edit the text in a scanned document using your PDF editor to recognise the text.

Digital signatures

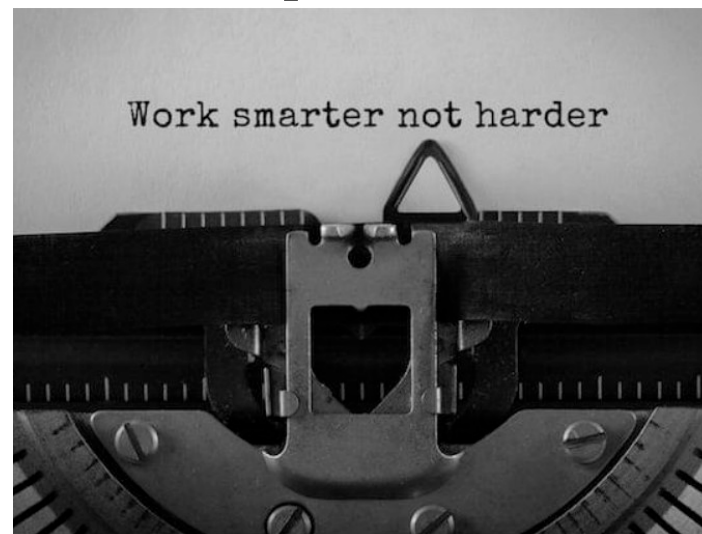
Many of us are used to the clunky process of printing out a document, signing it, and scanning it at the office. Even if you have access to a multi-function device at home, there is a more efficient way of doing this.

Your PDF editor [simplifies the use of digital signatures](#). Create a stamp using a photo of your signature and apply it to a document (or collection of documents). Or, add a certificate and sign a digital signature field in one step.

Need to collect a signature rather than add one? When your PDF editor [integrates with digital signature services like DocuSign](#), you can send one or multiple PDFs straight to the platform, ready to be emailed to the signer.

Use tools like Microsoft Teams for more than video calls

It's easy to lose sight of the big picture when working separately from your team. Without clear and constant communication, there is a risk team members will double up on work, miss important deadlines, or unknowingly cause project delays, not realising the next stage couldn't start until their work was delivered.



Video calls require everyone to be available at the same time. And there's a limit to how many you can have in one day while still being productive.

My colleague, Alex, who works with a team of software engineers, uses Teams channels and threads, rather than video calls, to stay productive while working on multiple projects from home.

Channels are where his team members add their daily updates to a single thread. This level of visibility is necessary because of the many moving parts of software development work. They need a record they can quickly refer to in case of unexpected issues.

Keeping colleagues in the loop helps them prioritise and keep projects on track. In my team of marketers, the graphic designer might update a thread with news that a new infographic template is nearly finished. In that case, the copywriter knows she needs to be ready to drop the text in soon.

Regularly update the software applications you use most

Software providers are pivoting to remote, agile working as quickly as you are by updating their products to meet changing needs. Regularly updating your desktop applications, like your PDF editor, ensures you're taking advantage of these new features.

How can you know when new updates contain important fixes and features that will help you be more productive?

One way is to follow your software providers on Twitter and LinkedIn, where they'll post about new updates. Or you can set up a Google alert for the application and 'update,' so the news doesn't get lost on your feed or in your inbox.

If you work in a large enterprise where software updates are managed by the IT department, you could let them know about an important update, so they can prioritise it accordingly.

These are just a few examples of using tools already in your arsenal to boost productivity. Don't be afraid to ask your IT department, or the software vendors themselves, for help finding new ways these applications can make your life easier.

Link4 e-Invoicing for Geoscience Australia.

Geoscience Australia has chosen Link4 as e-Invoicing Access Point provider to help meet the ATO's mandate of having e-Invoicing in place by 30 June 2021.

Geoscience Australia is Australia's pre-eminent public sector geoscience organisation. They are the nation's trusted advisor on the geology and geography of Australia. They apply science and technology to describe and understand the Earth for the benefit of Australia.

"Our team continues to deliver on our promise to make e-Invoicing as easy to access as possible", stated Andrew Bennett, head of Business Development at Link4. "We know e-Invoicing is a new concept for many, but it doesn't need to be daunting. We can help anyone through the process."

Link4 is an approved Peppol Access Point in Australia and is listed on the Peppol e-Invoicing panel for use by federal, state and local government agencies.

"We have thousands of businesses actively using Link4 today", noted Sam Hassan, CTO at Link4. "It's great to see so many Government Departments activating e-Invoicing as well"

APRIL International selects Ephesoft

APRIL International in Asia, a leading global insurance managing general underwriter, has selected Ephesoft to automate its claims and hospital invoices processing. APRIL provides and designs insurance solutions to make sure people are covered for private healthcare expenses anywhere in the world.

The Ephesoft Transact platform will be used to capture, classify, extract, validate and export data through APIs integrating into several internal analytics solutions, without any change to the personal data protection processes. This will ensure that APRIL is able to offer the best policies and coverage available to its customers anywhere in Asia at the best price.

"We are always looking for better, more efficient ways to help our customers thrive. Using leading technologies, like Ephesoft, will allow us to move faster while also ensuring accuracy with accessible, clean data for us to use downstream," said Romain Di Meglio, CEO of APRIL Asia Pacific. "We have a single goal of servicing our customers as best as possible."

With customer centricity top of mind, APRIL turned to Ephesoft to expedite and automate its insurance claims and hospital invoices, which were kept in disparate data sources in different countries and in multiple languages. Ephesoft technology supports many languages – APRIL will use English, Chinese and Thai – to help streamline their document processing. Using Ephesoft Transact, they can now centralize and standardize their data.

"At Ephesoft, we share the same goals as APRIL of creating the best customer experience possible with innovative solutions delivering efficiency, accuracy, productivity and compliance," said Ike Kavas, founder and CEO of Ephesoft. "It's even more important to automate processes during this global pandemic, and make it easier for customers to access services and products quickly, and safely. We're thrilled to help APRIL

and welcome them to Ephesoft."

The entire process makes it easier and faster for APRIL to accurately create the best insurance packages in the market, which is an enormous task to manage manually. Many traditional insurance providers are still processing and creating packages using manual processes, which will lead to potential market share loss. Ephesoft Transact allows providers to remain agile and keep up with an ever-changing insurance environment as well as customer expectations.

APRIL will launch Ephesoft in its Hong Kong headquarters, and plans to expand its use of Ephesoft into its other offices in Singapore, Vietnam, Indonesia, Thailand, France and the UK in the future.

Preservation of Imperial History

The UK's Imperial War Museums (IWM) has deployed Spectra StorCycle Storage Lifecycle Management Software to enhance its existing storage infrastructure, which supports its audio-visual and exhibitions departments to preserve invaluable data, including thousands of films, videotapes, audio recordings and photographs that would otherwise disintegrate and be lost forever were they not digitised.

StorCycle software is being used to manage a large amount of unstructured data that resides on expensive SAN and NAS storage outside of IWM's existing DAMS (digital asset management system) platform.

IWM has five sites across the UK, IWM London, IWM North, IWM Duxford, Churchill War Rooms and HMS Belfast, and is home to approximately 750,000 digital assets, representing a total of 1.5PB of data as uncompressed files. This volume is constantly growing, with new scans in the Museums' film collection generating an additional 10TB of data per month, and its videotape scanning project expected to create more than 900TB of data over the next four years.

A Spectra customer since 2009, IWM has implemented a large-scale data archiving solution to reliably preserve and manage its substantial digital archive pertaining to UK and Commonwealth wartime history. IWM's current archive infrastructure consists of two Spectra T950 Tape Libraries, one with LTO-7 tape media and drives, and one with IBM TS1150 tape media and drives, along with a Spectra BlackPearl Converged Storage System, BlackPearl Object Storage Disk and BlackPearl NAS solution.

IWM is on track to realise significant long-term cost savings by deploying Spectra StorCycle Storage Lifecycle Management Software to optimise their primary storage capacity through the offloading of inactive data to the Museums' archive infrastructure.

Spectra StorCycle identifies and moves inactive data to a Perpetual Tier of storage, consisting of object storage disk and tape. StorCycle scans the IWM departments' primary storage for media file types older than two years and larger than 1GB, and automatically moves them to the IWM archive, maximising capacity on the primary storage system.

"When we set out on our search to find a storage solution capable of preserving Imperial War Museums' substantial digital archive, there were specific criteria on which we were not willing to compromise," explained Ian Crawford, chief information officer, IWM.

Tackling the Insurance Industry's Unique Automation Challenges

Insurance companies were among the earliest adopters of the first wave of digital transformation - simply because their whole business is processing information from documents. Erwin Schwarzl, a senior executive at TCG Process, outlines why some of the world's largest insurers have adopted TCG Process DocProStar as a flexible Digital Assembly Line to efficiently deal with the demanding processing requirements of the insurance business.

Though the need for process automation can be similar in large organizations, there are unique challenges insurance companies face. What are those factors that drive the importance of automation in this industry?

ES: Insurance companies are among some of the biggest business-to-consumer companies in the world. If you have lots of clients, you have lots of communication. These clients interact with you in whatever way they feel like: paper, fax, email, social media, chat tools, ... and they still call. But no matter how they send in the information, the data must be processed the same way with the same rules and regulations. Customers expect their insurance company to be up to date on all communication when the insured calls, texts or emails. Insurance companies can no longer say "it'll take a week until I can review that communication or document"... they need access to all incoming information very quickly.

Even with all of this customer communication, many insurance companies still leverage antiquated, poorly-integrated legacy systems to manage client dossiers and risk. Often customer documents provide information which is key to regulatory compliance and proper risk assessment. A lag in processing time, however, can dull the customer experience and mean a competitor garners the sale.

And this isn't a one-time customer communication event. There are multiple correspondence points throughout the customer lifecycle in insurance. Some types of insurance require annual paperwork, regardless of whether or not a claim is ever filed.

Additionally, fraud prevention is a huge goal for all



Erwin Schwarzl, TCG Process

insurers, on both the claims and sales sides of the business. This is often why a client finds the TCG platform to be a good fit: Based on the client's business rules, TCG can enable fact-checking processes, helping companies to automatically identify suspicious networks and parties conspiring to maximize insurance claim payouts.

Which day-to-day insurance operations and processes are typically still the most manual and in need of automation?

ES: No matter the type of insurance provider, you always have these two parallel, but equally complex, processes running daily: sales and claims. Often, both have processes in need of automation. By far the most manual processing challenge facing insurance companies today is the claims process.

The number one challenge in claims is document logistics; you must ensure all documents that belong to a case come together for the claim to be processed.

To take it a step further, in addition to collecting and securing documents, insurance companies work hard on fraud prevention. The content on the document must be validated.

And when these manual processes encounter a seasonal or unexpected spike in incoming documents, as is the case when we experience natural disasters like hurricanes or fires, the need for automation becomes



even more obvious.

What is the typical entry point to automation? Is there a process in insurance that is the most common for customers to start with? Or does it just depend on what has the most internal value?

ES: It really depends where the pain is the biggest. Many of these companies already have some type of document management solution in place today ... but older solutions struggle to keep up with the need to be flexible and respond to changing requirements. Therefore, sometimes the entry point is a semi-automated process that the customer knows could be improved.

Also, as I mentioned before, insurance companies regularly run into workload challenges and this could be the process that drives the initial deployment. Insurance is a seasonal business. In Europe, automotive insurers renew all policies at the end of the year; the same can be said for US health insurance plans' open enrolment period.

This means that in the months of November, December and January these companies are dealing with much higher incoming communication load per day. Without automation, you need more people who must be trained in order to follow the proper processes, and to ensure an excellent customer experience. Our solution automates the process, rules, and validations which then lowers the need for seasonal personnel while remaining compliant with risk assessment and company policy.

ROI is always part of the discussion as to what comes next: Are we losing insurance customers because of turnaround time? Which process is very costly, if we move it how much money will we save in labour or IT infrastructure cost, for example?

When we can, we advise customers not to tackle the largest and most complex process challenge initially. The best practice is to start with something a bit simpler in order to build the organization's experience with the TCG platform. This helps our team understand the systems landscape and technologies, and together we determine how to best fit them together.

Sometimes, however, this is not possible, and they decide to jump in with both feet. At this point, we help them to break the project down into measurable pieces, or phases. This allows you to see ROI at every

checkpoint and offers measurable results for the length of the project.

How has the move to the cloud impacted the insurance market?

ES: The cloud has allowed insurers to reduce IT infrastructure costs. I mentioned the seasonal nature of the business ... With cloud infrastructure, insurance companies can turn around an enormous number of documents during peak processing times without having the hardware needed for that kind of speed sitting around for the low volume months. IT can scale up services to accommodate exactly what is needed, when it is needed.

It also offers the insurance organization the opportunity to outsource management of the automation tool. This often will lead

to quicker deployments, which means a quicker ROI. IT no longer needs to spend time setting up resources and infrastructure in advance of project kickoff.

What do you think is the next major trend in business process automation that people should be paying attention to today?

ES: I'd have to say the most interesting trend for our market is those that offer gains in contextual or semantic understanding.

And this is important, because there are not enough people around to do this manual work. Why should you have people that type data from a sheet of paper into a computer - or from one window of a computer into another? It addresses the ongoing, global need for data privacy as well. When we incorporate predictive technologies like AI and bots with traditional tech like character recognition in a process automation platform, we limit human interaction with sensitive data. And this is key to keeping your data yours.

What type of insurance companies have you worked with on document and data process automation?

ES: So many different types depending on where I was in the world! I've worked with the very large, BlueCross BlueShield-style insurance companies in the US, down to small providers, like the composite insurers here in Europe (most of whom have consolidated into big organizations). Today, we work with composite insurers, government-regulated public health insurance, and private health insurance alike.

Our first TCG Germany project focused on insurance contract documentation. We entered into a huge project with a large, international life insurance company; they wanted to create a digital process for agents selling financial products.

Of course, a huge benefit was the ease of document and information logistics, but the emotional driver for the organization was employee compensation.

Because many insurance agents are brokers, it's important for them to see how productive they have been; this is their livelihood. If an insurance company takes two months to deliver earnings information, it can mean decreased motivation and sales impact for important brokers.

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



Australian small businesses stuck in digital dark ages: CPA

Australian small businesses are less likely to invest in, use, earn from or offer customers the use of digital technologies than their Asia-Pacific counterparts, according to CPA Australia, the professional accounting organisation. CPA Australia surveyed 4,227 businesses in 11 markets about their operations and plans. Australian small businesses won the “wooden spoon” for digital transformation:

- Least likely to begin or increase online sales during COVID-19 – Australia
- Least likely to use social media for business – Australia
- Least likely to invest in technology in 2020 – Australia
- Least likely to profit from their investment in technology - Australia
- Least likely to review cyber-security in past six months – Australia

In addition, Australian small businesses were the second least likely to earn revenue from online sales and third least likely to offer customers the choice of digital payment technologies.

CPA Australia Chief Executive Officer Andrew Hunter labelled the results disappointing, saying; “Other markets made major in-roads on digital transformation during the pandemic. Clearly, Australian small businesses need more help than they’re getting to leave the digital dark ages behind.”

Unsurprisingly, most businesses in the region reported that COVID-19 had a major impact on their business. However, the consequences appear to have been felt slightly more strongly in Australia.

Only 22.3 per cent of Australian small businesses grew last year – the second lowest result of any market surveyed. Only 8.3 per cent of Australian small businesses added employees – the lowest result.

Despite the impact of COVID-19, 36.1 per cent of Australian small businesses reported they made no “major change” in response to the pandemic, the highest result of any market surveyed. They did not, for example, access government support, negotiate rent reductions or loan holidays, delay taxation payments or reduce capital expenditure.

Given that many Australian small businesses overlooked these relatively simple actions, it is unsurprising that more complex digital transformation did not occur. However, the consequences are profound.

Hunter said, “There is a clear link between innovation and performance. Our survey shows that growing businesses are more likely to use new technologies, e-commerce and social media. These are areas in which Australian small businesses performed poorly.”

“This digital divide will make Australia’s road to economic recovery longer and tougher than it needs to be. If Australian small businesses don’t transform, sales will go to more innovative competitors overseas.”

Australian small businesses expect to fare better in 2021, however, they may still underperform other Asia-Pacific businesses. Only 41.4 per cent of Australian small businesses expect to grow this year compared

with the survey average of 60.8 per cent. Thirteen per cent expect to increase employees numbers, compared with the survey average of 35 per cent.

Failure to innovate is likely to continue to hold Australian businesses back. Only 6.7 per cent of Australian small businesses say they will introduce a product, process or service that is unique to their market or the world in 2021, compared with 23 per cent in other markets.

Hunter urged the government to show greater support for digital transformation, “While businesses should play an active role in digital transformation, the government needs to play a bigger role in helping businesses manage this change.”

“Ad hoc financial support for digital transformation isn’t sufficient. There needs to be a significant commitment of public funding to help Australian small businesses transform.”

On the question of how much is needed to fund digital transformation, Hunter said “Given how far behind Australian businesses are, the level of investment needed to bridge the digital divide is quite substantial. For example, last year Singapore announced an AU\$325 million program to support local businesses with digital transformation.”

Download [CPA Australia Asia-Pacific Small Business Survey 2020-2021](#).

Mark43 signs deal with NSW Police

The 18,000-user New South Wales Police Force (NSWPF) has become the first international customer for the US firm Mark43’s single-platform Records Management System (RMS) and Computer Aided Dispatch (CAD) platform. Mark43 will provide and implement the call-taking, dispatch, records, investigations, and forensics components of the new Integrated Policing Operations System (IPOS) for NSWPF. After the rigorous process of choosing a vendor, NSWPF has selected Mark43 to institute transformational change across the force and bring a modularized solution that will create process efficiency for users, reduce data entry time, decrease incident response times, and improve officer safety through real-time field monitoring and in-time information.

As one of the largest police forces in the world, NSWPF’s approximately 18,000 sworn officers will leverage Mark43’s technology to make operations more efficient across the state of New South Wales. NSWPF is Australia’s oldest and largest police organization providing community-based policing to a population of nearly 8 million people in the state of New South Wales. With more than 400 stations, NSWPF also serves a wide range of ethnic communities that speak over 30 languages.

“Ensuring the safety of the community of New South Wales is our top priority,” said Deputy Commissioner Corporate Services, Mal Lanyon.

“In partnership with Mark43, NSW Police Force is equipping our frontline police with the best digital technology and capabilities available in the world to prevent, disrupt and respond to crime and serve the needs of our community,” said Lanyon.

<https://www.mark43.com/>

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AP Automation Solved in Five Easy Pieces

Is it just another buzzword or is AP Automation really the secret to healing the main pain points in your accounting department? And how can you be assured of a fast Return on Investment (ROI)?

At ELO we believe there is no 'one size fits all' solution, so we have developed five different AP Automation packages to fit a range of different business scenarios.

For example, many small and medium businesses (SMBs) don't have the volume of incoming invoices per year to justify the expense of full automation. But they can be greatly assisted with a solution that answers these common cries for help:

- Where is my document?
- Why hasn't it been approved?
- Who should approve it?
- How can I easily compare the purchase order with the invoice?

Whereas for larger companies, who perhaps don't want to add new staff, their priorities will be instead to look at optimisation of their overheads and/or pre-empting growth using AP Automation.

To cover all these scenarios, ELO has developed five different solution packages:

1. AP Facilitation

This fast to deploy product is often live in less than 5 days. It provides AP staff with the power to just click on the values of the invoice and have data automatically transferred to the respective metadata fields in ELO. Once two or three sets of data have been added, system is able to file the invoice into ELO and begin an approval workflow automatically.

2. Business Solution Invoice - Click & Tag

Again, the user simply clicks on required fields on the invoice to add data. However, some fields now serve as Unique Identifiers (UID) which trigger an automated database look up. For example, one could click on a purchase order number and almost all fields will be populated by the system and the invoice will be filed in ELO. Business Solution Invoice - C&T can be deployed in 10 to 15 days excluding external database lookups.

Our free Analytics tool provides AP staff with a meaningful dashboard, outlining the status and values of all invoices.

3. Business Solution Invoice - Smart Input

The Smart Input solution increases the level of automation significantly. Every invoice that is put into ELO will undergo a full OCR process. Words and data are extracted and compared with datasets from lookup databases. All values that match will be transferred to the respective metadata fields in ELO. Upon clicking OK, the invoice will be filed in the system, a workflow starts and after all approvals are completed, the dataset can be made available for the ERP system for payment.

Analytics and the Dashboard provide a live status report at any time. The software

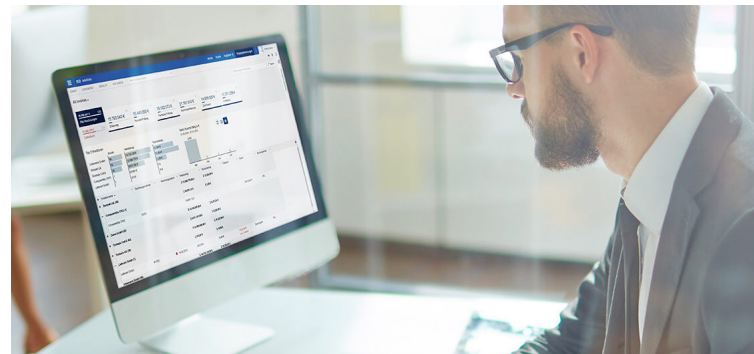
1. AP Facilitation

2. Business Solution Invoice - Click & Tag

3. Business Solution Invoice - Smart Input

4. Business Solution Invoice - Header & Footer

5. Business Solution Invoice - Line Item



for the Smart Input functionality is provided free of charge. So, if you know the majority of your suppliers and you only need to know the "from", the "to" and the "how much" for processing your invoices, this product is the best and most cost-effective way forward.

All data is extracted automatically!

4. Business Solution Invoice - Header & Footer

This solution is aimed at companies that may not always know their suppliers upfront. Companies that often have more than 2,000 to 3,000 invoices per month and want a high level of automation. The ELO DocXtractor uses intelligent search engines to recognise content from an image and "makes assumptions" on what it could be. Then, the

DocXtractor compares those assumptions with databases and auto-populates the respective fields in the metadata forms. AP staff can opt in to verify the data before workflow processes start.

Most importantly, the system learns from inputs received from AP Verifier personnel.

Every change, every confirmation makes the system smarter for the next batch of invoices.

5. Business Solution Invoice - Line Item

The combination of the ELO ECM Suite and the DocXtractor Line Item module is one of the best AP Full-Automation products in the market. With neural databases for fast learning, embedded workflow engine and a sophisticated verifier tool, the majority of keystrokes are avoided.

This system, mainly used in larger entities, recognises the content of invoices, compares the values down to the line item level with various databases and if matching with a purchase order, could automate the entire accounts payable process - potentially without human intervention.

Item No.	Description	Quantity	Unit of Measure	Unit Price	Amount
2000	PO BUBBLE 300mmx300mm	1	ROLL	69.95	69.95
1000	CUBING LAY BUBBLEFORM	1	EACH	15.00	15.00
				Total AHD Incl. GST	84.95
				Total AHD Incl. GST	99.95

Line Item recognition allows the correct allocation of goods and services that have been received to the correct General Ledger code. Following the learning period, in excess of 90% of all keystrokes could be automated.

In Summary:

Whether you are a small company, a medium company or a large entity, ELO has the right product/solution to solve your Accounts Payable pain points.

All we need to ask you is, be aware of your challenges and select a system that can grow.

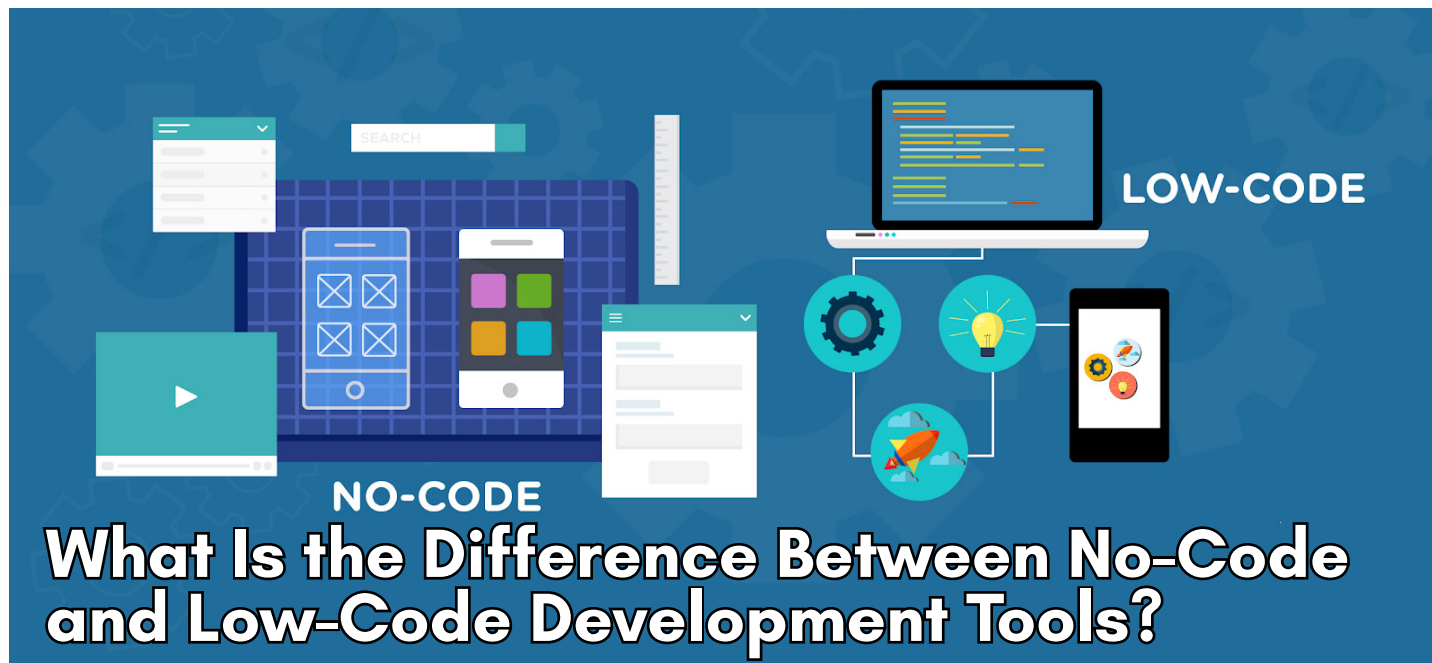
If you have less than 10,000 invoices per year, don't go with a system that promises full automation. You will not have a return on investment. If you only have one or two staff in accounts payable, don't spend big on AP Automation - just select our AP Facilitation or Click & Tag. These products are up and running quickly and will solve your team's issues.

If you are large or envisage to become large soon and have 30,000 or 100,000 invoices per year, then yes, select our solution including Line Item recognition. You will be rewarded for your investment within roughly 9 to 15 months.



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By Gartner Analysts Jason Wong, Paul Vincent, Akash Jain

The overused terms “low-code” and “no-code” are confusing application and software engineering leaders about which development tools to choose. Leaders should focus on evaluating these tools based on their fit to use cases and skill sets, rather than the labels used to describe the products.

Application and software engineering leaders are bombarded by vendors promising great benefits, such as speed and ease of use through the use of their low-code or no-code tools.

Additionally, business unit leaders are demanding to use more of these tools to enable business technologists (identified as “technology producers” that do not report to IT) to produce apps and automations for their business needs. Ignore vendor hype and promises, and instead focus on the underlying platform architecture and technology approaches of the tools to find the best fit ones - regardless if they call themselves low-code, no-code or both.

“No-Code” Is a Marketing Term, Implying the Tool Is for Non-Professional Developers

No-code development tools abstract the codebase entirely by providing a visual “what you see is what you get” (WYSIWYG) interface to building an application; from the data model to business logic to workflows to the user interface (UI).

Fundamentally there is really no such thing as “no-code.” It’s a marketing label, just like Salesforce’s slogan of “no software.” There is always code and software running somewhere, just hidden.

This complete abstraction of application behaviour to avoid code means that any custom feature, and or function needed for an application, is limited to what is already surfaced in the tool.

The no-code approach only allows for a certain level of customization through the WYSIWYG tool. Adding new capabilities will usually require the vendor, or its professional services staff, to create and release new features for use within the tool.

“Low-Code” Tools Often Support Scripting for Capabilities Beyond Only a “No-Code” Approach

Low-code development is rapid application development or high-productivity development, with an option to use code or scripting. These tools can use a variety of approaches that both automate and abstract application development activities, such as drag-and-drop editors, code generation, component assembly and model-driven and metadata-driven development.

Low-code development offers a way to add custom features or functions for an application with new code. The code supported can be a proprietary language or standards-based languages. JavaScript is one of the most popular and common languages supported by low-code development tools.

This approach allows customers and partners to have a higher degree of customization than no-code tools. However, the added custom code must be carefully managed to prevent accumulation of technical debt and change management issues.

Invest in Tools That Offer Prebuilt “Blocks,” But Beware of Tools That Are Highly Specialized Solutions

Low-code and no-code development approaches typically abstract functionality using the concept of assembling “blocks,” which can be application components, external API references, templates, modules or widgets. Just as with children’s building block sets, each tool has different sized and shaped blocks.

Example of blocks include:

- Integration connectors to popular SaaS applications or data sources
- UI components such as list views, a signature capture or camera control
- Process models for common business or industry-specific workflows
- Business logic to support business rules, validation and other application features

Tools that are labelled both low-code and no-code (“low-

code/no-code” or “LCNC”) are just low-code in approach.

Any development tool needs an expression language to describe business logic, regardless of whether it’s no-code or low-code. The complexity and sophistication of these expression languages determines the types of applications that can be constructed. The no-code aspect means that, for certain app use cases, the tool does not require any coding. However, this is also usually true for most low-code marketed tools.

Additionally, the terms low-code and no-code are so commonly used in vendor marketing that in some cases they merely refer to a specific application or solution that is easy to configure or extend. For example, an asset management application can be no-code or low-code if it allows for some extensibility beyond what comes out of the box. This is very different from buying a general purpose low-code or no-code development tool which can build many different types of applications or solutions.

Evaluate these tools based not just on one application use case, but against several potential options to ensure it can grow with enterprise needs.

Ensure the No-Code or Low-Code Approach Fits the Skill Sets of the Target Developers,

No-code does not necessarily mean no technical skills needed. Tools that are positioned as no-code aim to provide all the building blocks for customers, usually on an ongoing release basis. These vendors try to offer assembly blocks small enough so that developers can assemble a bigger custom application component if needed, but writing code is not allowed. No-code implies no programming language is used, but even some visual modelling tools require technical expertise

or understanding programming metaphors.

Low-code requires more developer buy-in and skills alignment. Tools that are positioned as low-code allow developers to build new blocks that may be missing in the set, by writing some code. These custom blocks must fit properly with the out-of-the-box blocks, so development must use a specific language, framework, pattern or SDK.

Regardless of Marketing Labels, Make Sure the Tool Supports Your Existing Integration, Automation and SDLC Stacks

If your organization wants to use no-code or low-code tools to compose applications by assembling building blocks from multiple vendors, the pieces need to fit well.

Usually this would require gluing the pieces, which means using APIs and integration code. However, some vendors will have prebuilt integrations (i.e., specific block connectors) and others will have a marketplace where partners can ensure that their blocks are built to the same specification and standards. This may involve creating an OpenAPI definition for a service or supporting webhooks for simple events.

When evaluating no-code and low-code development tools, go beyond the vendor’s marketing message to assess the underlying approach to their development tools or platforms. Just because a vendor is marketing “low-code” may not mean it’s for professional developers, and another marketing “no-code” doesn’t always mean it’s for citizen developers.

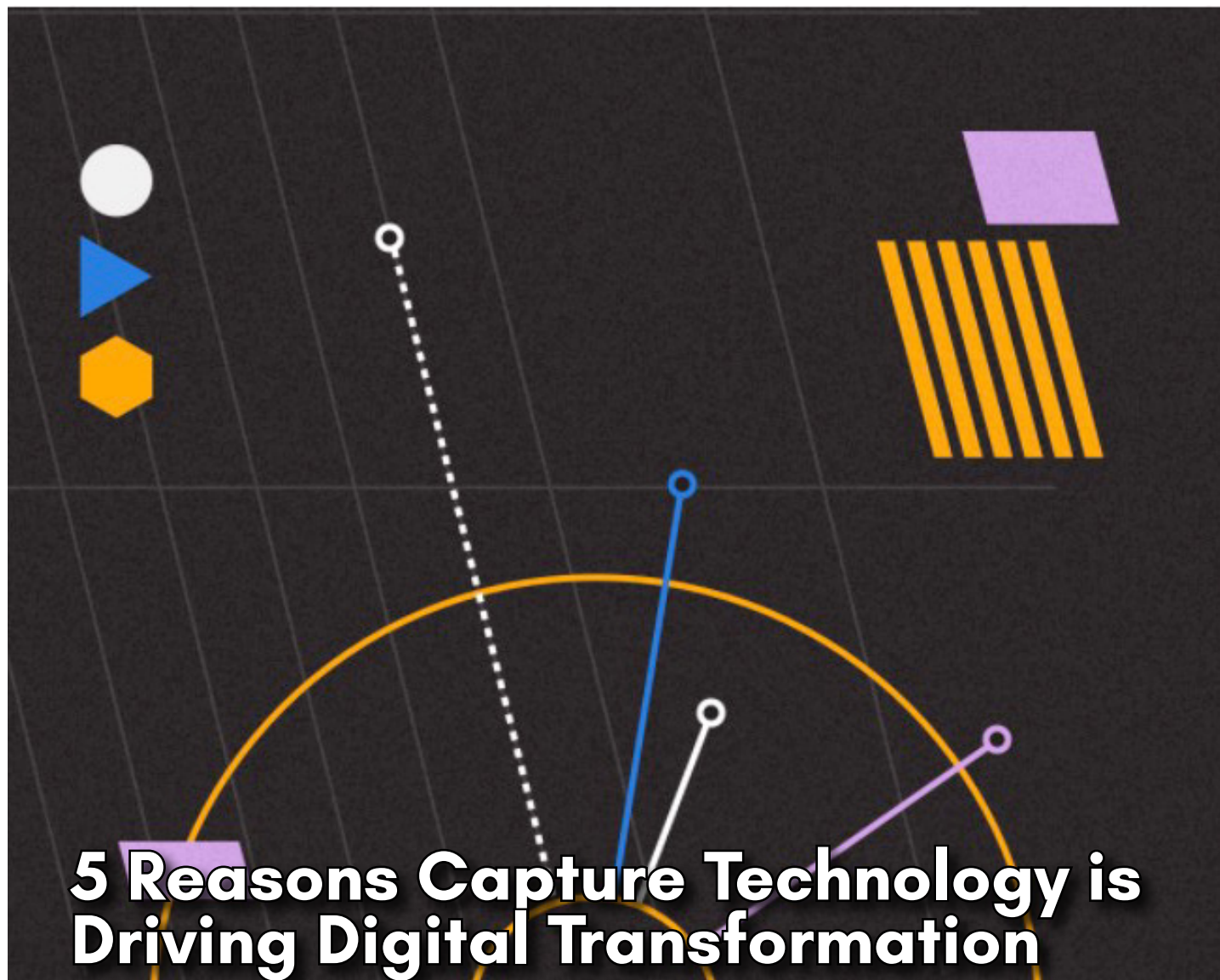
Determine how code is abstracted and added because this will ultimately determine the extensibility and flexibility of their approach, and how easy the tool is to connect with other technologies.

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5 Reasons Capture Technology is Driving Digital Transformation

By Karen Cummings, Upland Software

Digital Transformation is the ideology of the year for businesses reliant on document-intensive work. Countless organisations of all sizes and industries have shifted their processes to find solutions that provide fast, reliable, and secure ways to get data into their systems. Cloud capture has become a driving force for implementing digital strategies this year with good reason. Digitising data right at the point of entry into the document lifecycle makes perfect sense before sending it off to recipients and workflows.

As many organisations move to paperless processes, considering how capture technology ties into a document management system (DMS) is a critical first step.

To help the rest of the business go digital, capture solutions help you handle the never-ending challenges associated with paper and document transmission more easily. Here are the basics to any powerful capture solution:

1. More Ways to Get Documents In

When it comes to implementing new technology and standardising processes, user adoption is critical, and it is wholly based on ease of use and flexibility.

Not every business has the same procedures; everyone

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has different staff and structure. One organisation may have a scanning staff, others may empower employees with tools to do it themselves, and some may even have a hybrid of both methods.

When it comes down to it, if you can give employees resources to submit documents from MFPs, desktop scanners, mobile devices, fax, email, or even APIs, you can enable any use case and solve problems that save everyone time.

2. Extracts and Organises Data – Automatically

Basic capture solutions allow images and documents to be transformed mid-transit on the way to the final destination and advanced capture solutions take these capabilities to another level.

With sophisticated functionality like document classification with data extraction, you can effortlessly pull information off what were once flat images.

When you enable capture with data extraction and indexing capabilities, you can send these documents downstream with related information that can dictate workflows and final destinations, even down to the folder level inside line-of-business systems. Talk about taking the busy work out of your day!

3. Easily Integrates with Other Systems

Capture technology is most useful when it can integrate seamlessly with existing systems like cloud fax, Electronic Medical Records (EMR) for healthcare, Student Information Systems (SIS) for education, or Document Management Systems (DMS) such

as [NetDocuments](#).

The ability to dovetail with existing software and systems enables busy workers to quickly capture an image or document and route it directly into the hands of the right recipient or repository, with a simple click of a button.

More so, with systems like NetDocuments, you can set up dynamic workflows that will automatically submit to different folders inside NetDocuments immediately upon scan. The bottom line? The path to the DMS is much faster, and your staff will appreciate the superior user experience.

4. Enhances Security and Compliance

In our data-driven business climate, ensuring the security of data captured is of paramount importance. This is why premier capture solutions must take into account industry data privacy and security standards like HIPAA, PCI DSS, ISO 27001, and beyond.

A few other features that bolster data security for captured content are secure faxing for communication of sensitive information, data loss prevention, encryption at rest, and “delete upon send” capabilities that ensure captured images don’t remain locally on devices on which they were captured.

5. Enables Work from Anywhere

These days, staff are working from everywhere – office headquarters, the home office, while traveling on the job, who can keep track?

Capture technology that’s accessible from any desktop – or even better, any mobile device – allows content to be

quickly and securely captured, organised, and routed to workflows, appropriate staff, or archival as needed.

It removes the wait to retrieve from off-site storage, couriers, snail mail, or access to scanning devices since work can get done from any network-enabled device. In this brave new remote working reality, accessibility is a big win to ensure business continuity.

Bringing it Home

In truth, paper will likely never go away entirely – at least not in our lifetimes. But cloud capture is taking Digital Transformation from concept into practice for organisations worldwide by providing fast, seamless, and secure processes to replace the paper chase.

Using smart capture technologies, staff can capture document images from almost any device, automatically pull data they need, and make decisions based on that data to send it downstream to other team members or applications. With cloud capture, organisations solve process challenges and set the wheels in motion toward a nearly paperless future.

Learn More

[Upland Intelligent Capture](#) and [Upland AccuRoute](#) offer scalable capabilities to NetDocuments users to better manage cloud-based capture and enterprise fax solutions, with the result of making smart Digital Transformation strategies more realistic to put into practice farther down the line. Enquire at <https://www.filebound.solutions/contact/>

Karen Cummings is EVP and General Manager for the Upland Document Workflow suite of products.

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The Risk of Insider Threat in Financial Services

By Tony Holland

The Financial Services sector is a prime target of cybercrime due to the personal & financial data it collects from its customers that can easily be monetarised. In 2020 there were more than 1,500 data breach incidents reported in the Financial Services sector globally, with financial motives accounting for more than 90% of the data breaches, according to the Verizon 2020 Data Breach Investigations Report.

Australia's largest banks acknowledge risks associated with cyber threats, and the dire social and financial consequences of data breaches, including business disruption, reputational damage, financial losses, regulatory sanctions, and a loss of customers.

Australia's Financial Services industry regulator has concerns about the sector's cyber resilience. The Australian Prudential Regulation Authority (APRA) supervises Australia's banking, insurance and superannuation institutions, promoting the financial system's stability and seeking to reduce the likelihood of a financial institution failing.

Aiming to ensure that all regulated entities have adequate information security protection, APRA mandates compliance by regulated entities to its Information Security Standard CPS 234. Amid consistent evidence that many entities are failing to adequately comply with CPS 234, in November 2020, APRA announced a 'step change in regulatory intervention' with the release of its 2020-2024 Cyber Security Strategy.

Data breach incidents can either be the result from an external cyber-attack, such as distributed denial of service, malware, and ransomware; or an insider.

Often a data breach incident resulting from a credential thief is seen as an external attack – however, it should be viewed as an insider threat incident, as with the stolen credentials the external cybercriminal impersonates an insider. Take the massive LinkedIn data breach in 2012 as an example, where a Russian hacker stole the credentials of a LinkedIn engineer. Using the stolen credentials, the hacker accessed the LinkedIn network posing as the LinkedIn engineer, a trusted insider. With the trusted insider's access, he was able to log into the LinkedIn user database and download the username, password hash, and e-mail addresses of millions of LinkedIn users.

An increased focus on Insider Threat is required

There is a lot of recent commentary about the heightened external cyber-attack environment. However, insider threats can be an under-addressed cybersecurity threat within organizations. Clearly the occurrence of security incidents resulting from insiders are accelerating, with the number of reported incidents resulting from insiders increasing by 47% between 2018 & 2020 according to the Ponemon Institute.

Further, the rapid shift to remote working following Covid-19 has created additional challenges detecting insider attacks.

In response to COVID 19, Australia's largest banks accelerated migration to cloud strategies and support of remote working. For example:

- In 2020 National Australia Bank had 865 applications in the cloud with plans to migrate a further 1,080 by 2025;
- Due to Covid the Commonwealth Bank of Australia shifted more than 39,000 employees to remote working;
- By 2025 the Commonwealth Bank of Australia plans to have 95% of computing in the cloud;
- Responding to Covid, Westpac Group had 85% employees working from home; and
- In 2020 ANZ Bank moved 95% of its non-branch employees to working from home.

The greater use of cloud applications combined with increased rates of remote working can make detecting insider attacks more difficult, thus increasing insider Threat risk.

Strategies for Financial Services organisations to minimise Insider Threats

Strategies to minimise insider threats differ according to the type of insider threat. Ponemon Institute analysis of reported incidents in 2020 against the three insider threat profile types found that:

- 62% were due to employee or contractor negligence;
- 23% were by criminal or malicious insiders; and
- 14% involved credential theft

Preventing data breaches resulting from criminal or malicious insiders

The Australian Cyber Security Centre offers advice to prevent against criminal or malicious insiders, including

technical controls, access controls & auditing.

Technical controls include controlling the channels that malicious insiders can use to exfiltrate data, such as blocking moving confidential data to removable storage (e.g., a USB stick); preventing access to confidential data from unmanaged devices; controlling printing of confidential data; limiting the ability to attach confidential data to email; and blocking uploading confidential data to cloud-based storage services.

Access controls include restricting access to confidential data, so that staff can only access what they need to do their job; and access is deactivated when they change roles or leave the organisation.

Auditing refers to logging & monitoring employee's network activities, especially when using high-risk systems and working with confidential data. Australia's major banks face the challenge of a large number of application systems (e.g. more than 2,000). These applications may be developed by different providers, employing differing technologies, with limited or no integration.

To be effective user activity monitoring needs to encompass all of the data exfiltration channels that are available including email, USB, print, web, cloud, local drive, screen capture, clipboard, etc.

APRA's Chair Wayne Byres provides a stern warning: "It is not a matter of planning for if somebody gets into your system, it's a matter of when someone gets in – and how quickly you can shut down their activity."

Data Breach Prevention is the key

If an insider has already stolen your data, there is little you can do post breach to recover the data.

Going back to the LinkedIn example, LinkedIn first

became aware of the data breach after learning that LinkedIn user data had been posted for sale on an online forum. The very lengthy post breach investigation eventually identified who stole the data, but it was too late as the user data had long been compromised.

That is why prevention is key.

According to Gartner, Insider Risk Management Solutions provide passive controls that 'do not directly mitigate risk but provide the situational awareness that enables the application of an appropriate active control (for example, altering the configuration of a content filter in a secure web gateway)'.

Australia's major banks also face the problem of scale, having approximately 40-50,000 employees' activities to monitor for suspicious behaviour. It is likely that the time & resources required to identify suspicious behaviour from a high volume of alerts & respond by applying an appropriate active control will take too long in order to prevent a data breach, and that some data breaches may go unnoticed.

Emerging technology solutions seek to address this challenge by integrating the passive control system (e.g., the user activity monitoring and behavioural analytics system) with the active control system (e.g., altering the configuration of a secure web gateway or data loss prevention system), providing an automated, adaptive control system based on insider threat risk, calculated from user behaviour. With successful deployment of this model organisations can apply monitoring policies for low-risk users, whilst dynamically applying blocking policies for high-risk users, preventing data breaches.

Tony Holland is Strategic Account Manager - Financial Services & Government at Forcepoint, a specialist in data protection and cybersecurity.



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Top Security & Risk Trends for 2021

By Kasey Panetta, Gartner, Inc.

Cybersecurity mesh, security-savvy boards of directors, and remote working all made this year's security and risk trends.

As cybersecurity and regulatory compliance become the top two biggest concerns of corporate boards, some are adding cybersecurity experts specifically to scrutinise security and risk issues.

Adding a cybersecurity expert directly to the board is just one of the eight Gartner security and risk trends for 2021, many of which are driven by recent events such as security breaches and the COVID-19 pandemic.

"In the past year, the typical enterprise has been turned inside out," says Peter Firstbrook, VP Analyst, Gartner.

"As the new normal takes shape, all organisations will need an always-connected defensive posture, and clarity on what business risks remote users elevate to remain secure."

This year's security and risk trends highlight ongoing strategic shifts in the security ecosystem that aren't yet widely recognised, but are expected to have broad industry impact and significant potential for disruption.

Trend No. 1: Cybersecurity mesh

The cybersecurity mesh is a modern conceptual approach to security architecture that enables the distributed enterprise to deploy and extend security where it is most needed.

When COVID-19 accelerated digital business, it also accelerated the trend wherein many digital assets — and individuals — are increasingly located outside of the traditional enterprise infrastructure.

Additionally, cybersecurity teams are being asked to secure countless forms of digital transformation and other new technologies.

This requires security options that are flexible, agile, scalable and composable — those that will enable the organisation to move into the future, but in a secure manner.

Trend No. 2: Cyber-savvy boards

With an increase in very public security breaches and increasingly complex security setups, boards are paying more attention to cybersecurity.

They recognise it as a huge risk to the enterprise, and are forming dedicated committees that focus on discussing cybersecurity matters, often led by a board member with security experience (such as a former CISO) or a third-party consultant.

This means that the organisation's CISO can expect increased scrutiny and expectations, alongside an increase in support and resources.

CISOs will need to improve their communication and should expect tougher questions from the board as a result.

Trend No. 3: Vendor consolidation

The reality of security today is that security leaders have too many tools. Gartner found, in the 2020 CISO Effectiveness Survey, that 78% of CISOs have 16 or more tools in their cybersecurity vendor portfolio; 12% have 46 or more.

Too many security vendors results in complex security operations and increased security headcount.

Most organisations recognise vendor consolidation as an avenue for reduced costs and better security, with 80% of organisations interested in vendor consolidation strategy.

Large security vendors are responding with better integrated products. However, consolidation is challenging and often takes years to roll out.

Although lower cost is often a driver of this trend, more streamlined operations and reduced risk are often more achievable.

Trend No. 4: Identity-first security

The perfect storm of several events made identity as the new perimeter a trend, including COVID-19, resulting in remote work and technical and cultural shifts.

Identity-first security has been considered the gold

standard for a while, but because many organisations remained in more traditional setups, it wasn't a focus.

Now that the pandemic has pushed organisations to fully (or mostly) remote, this trend has become vital to address.

The result of these technical and culture shifts is that "identity first security" now represents the way all information workers will function, regardless of whether they are remote or office-bound.

Trend No. 5: Managing machine identities as a critical security capability

As digital transformation progresses, organisations are seeing increased numbers of non-human entities, which means managing machine identities has become a vital part of the security strategy.

Included in machine identities (as opposed to human identities) are workloads (i.e., containers, applications, services) and devices (mobile devices, desktop computers, IoT/OT devices).

As the number of devices increases — and continues to grow — establishing an enterprise-wide strategy for managing machine identities, certificates and secrets will enable the organisation to better secure digital transformation.

Trend No. 6: Remote working is now just work

According to the 2021 Gartner CIO Survey, 64% of employees are now able to work from home, and two-fifths actually are working from home.

As a result of COVID-19, what was once only available to executives, senior staff and sales is now widely available, with plans to shift some employees to remote

permanently post pandemic.

From a security perspective, this requires a total reboot of policies and tools and approved machines to better mitigate the risks.

Trend No. 7: Breach and attack simulation

A new market is emerging to help organisations validate their security posture.

Breach and attack simulation (BAS) offers continuous testing and validation of security controls and tests the organisation's posture against external threats, as well as offering specialised assessments and highlighting the risks to high-value assets like confidential data. Plus, BAS includes training to enable security organisations to mature.

These tools will help immediately identify issues when it comes to the efficacy of security controls, configuration issues and detection capability.

The ability to run this kind of assessment repeatedly and across a range of attack techniques enables better security assessments in near real-time.

Trend No. 8: Privacy-enhancing computation techniques

Privacy-enhancing computation (PEC) techniques are emerging that protect data while it is being used — as opposed to while it's at rest or in motion — to enable secure data processing, sharing, cross-border transfers and analytics, even in untrusted environments.

This technology is rapidly transforming from academic research to real projects delivering real value, enabling new forms of computing and sharing with reduced risk of data breaches.



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The Four Lies Destroying Records Management

1: Information vs Data

By Don Lueders

Given that effective records management – executed in good faith – is the sole means of holding our most powerful institutions accountable for their behaviour, these same institutions have been waging a brutal war on the records management profession for nearly two decades.

And sadly, they are winning, as evidenced by the swirling information chaos that grips every private and public organization across the globe. The tragic consequences of this rampant information chaos – the political upheaval, the financial ruin, the loss of innocent lives – is the kind of evil that has been traditionally limited to the most repressive and tyrannical regimes in history but has now infected some of the most advanced societies in the world.

All evil behaviour is built on a foundation of lies, and the war on records management is no exception. The powerful forces determined to destroy our ancient and noble profession need you to believe four key lies so they can prevent the accountability, transparency, and information security that records management provides.

Lie #1: 'Data' and 'information' are the same thing.

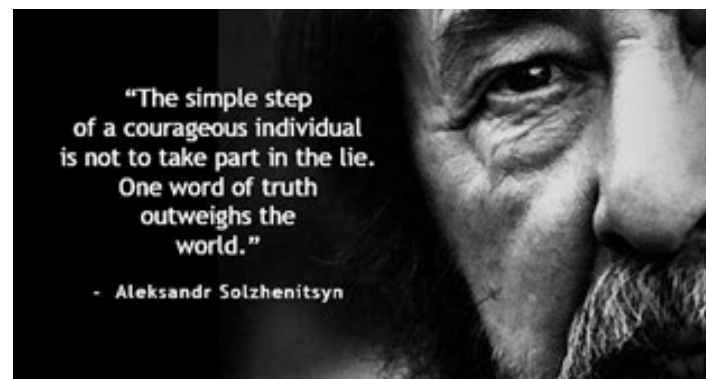
Data is a collection of values. It is a giant bucket full of letters, numbers, and symbols. Data, by itself, is useless.

The folks at Paycom seem to understand this. Below is a screenshot from a great commercial they've been running recently, showing poor people who are literally up to their waists in 'data' – just a bunch of meaningless, uncontrolled values, slowing down their jobs and making their lives miserable.

Any organization can create an enormous amount of useless data. But if you put that data into context it becomes 'information' – and that gives it value.

This is what Paycom wants you to pay them to do: pour your useless data into their solution so you can use it to create information:

So clearly 'data' and 'information' are two related, but different things. But if that's true, why does an



organization as powerful as the US Federal government not seem to understand that? And why does the National Archives and Records Administration say this in their Cognitive Technologies White Paper released in October of last year:

"Records management governance for data is codified in 44 U.S.C. Chapter 33, Section 3301, which states that federal records include "all recorded information" regardless of form or characteristics. The term "data", as defined by 44 U.S.C Chapter 35, Section 3502, means recorded information, regardless of form."

Think conflating 'data' and 'information' doesn't cause problems? Consider this. All US Federal government agencies have an Agency Records Manager. He or she is in charge of the program that manages the lifecycle of agency records. By definition, 'records' include "all recorded information", so an agency's records management program is responsible for managing the agency's information.

But now, thanks to the OPEN Government Data Act, each agency is assigned a Chief Data Officer, who is charged with leading a massive new internal bureaucracy "responsible for lifecycle data management".

If 'data' is defined by the Federal government as "recorded information", how does the Chief Data Officer's responsibility for managing the lifecycle of data not directly overlap the Agency Records Manager's responsibility for managing the lifecycle of agency records?

The truth is, thanks to conflation of the words 'data' and 'information', the responsibilities of the Agency Records Manager and the Chief Data Officer are exactly the same and each agency in the Federal government now has two bureaucracies charged with managing the lifecycle of government information. This overlap results in conflicts with agency information management responsibilities that have made progress in managing the lifecycle of any agency information virtually impossible.

It also significantly undermines the effectiveness and reputation of the agency's records management program...which may have always been the point in the first place.

#2: Storage vs Preservation

In the months following the Presidential election several prominent media outlets, including PBS and New Yorker Magazine, ran opinion pieces forcefully reminding the Trump administration of their obligations under the Presidential Records Act to "take all such steps as may be necessary to assure that the activities, deliberations, decisions, and policies that reflect the performance of the President's constitutional, statutory, or other official or ceremonial duties are adequately documented and that such records are preserved and maintained as Presidential records."

I'm not questioning the motivations of these publications. I'm sure they want the Trump White House held accountable for its actions just as closely as previous administrations had been held accountable for theirs. But I do question whether the writers of these opinion pieces understand exactly what they are asking for...and if it is something anyone in the White House is capable of providing.

Federal records are defined as "all recorded information." *Storing* records (i.e., information) is easy. *Preserving* information, however, is far more difficult. This is because storage and preservation are two very different things.

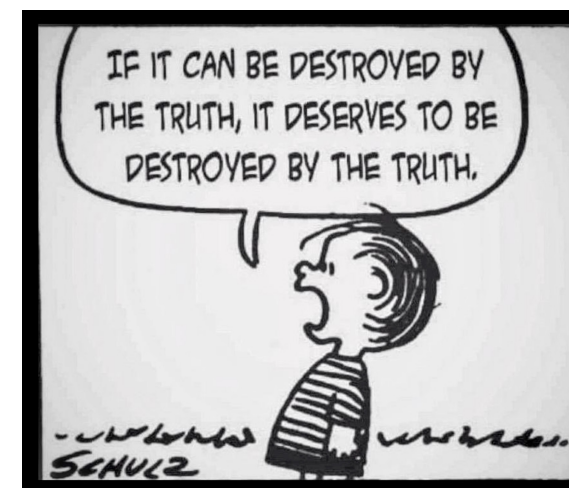
If I put a T-bone steak in my refrigerator – where it is readily available, but also vulnerable to spoilage – that is *storage*. If I put that same steak in my freezer – where it is slightly less accessible but can be protected from harm for a much longer period of time – that is *preservation*.

Similarly, if I keep a paper record in my office desk drawer, I am *storing* it. But if I bring that same paper record down to my company's records centre and have the corporate records manager categorize it, box it up, and put it on a shelf for the remainder of its appropriate retention period, I am *preserving* it.

Storing and preserving electronic information is no different. I can store an electronic record just about anywhere: file shares, thumb drives, laptops, even printer memory is capable of storage. But if I want to preserve it, my list of options becomes a great deal shorter.

US Federal Government regulation 36 CFR § 1236.20 describes "appropriate records keeping systems" for agency (and White House) electronic records. It states, in part, that these systems must "Prevent the unauthorized access, modification, or deletion of declared records, and ensure that appropriate audit trails are in place to track use of the records." It also mandates that these systems "...enable the migration of records and their associated metadata to new storage media or formats in order to avoid loss due to media decay or technology obsolescence." In other words, these systems must be capable of *preserving* the records, not just *storing* them.

But were the Trump administration's records preserved in records keeping systems compliant with 36 CFR § 1236.20? I can't say for sure. I haven't managed



Presidential records since the last Bush administration. But, based on my experiences over nearly a quarter century supporting Federal records management, I can tell you it is highly unlikely.

So, if we assume that some – possibly all – of the Trump administration's electronic records were being *stored*, rather than *preserved*, what does this mean to historians and journalists? What does this mean for members of the Trump administration, including the President himself? And, most importantly, what does this mean to the American public?

Unfortunately, this is bad for everyone. The journalists and historians writing about the Trump presidency need to know the information they receive from FOIA requests is authentic and that no electronic records have been doctored or destroyed. Members of the Trump administration need to be able to prove the exact same thing. And the American people, as always, deserve to know the truth, whatever that may be. Sadly, if the Trump administration was *storing* their records rather than *preserving* them, none of this is possible.

The powerful forces who want to destroy records management need you to believe that storing information – in their expensive repositories, in their massive collaboration platforms, in their giant cloud environments – is the same as preserving information.

It is not. And until this is widely understood and records preservation is a requirement for all organizations – both public and private – the world will continue to drown in misinformation, disinformation, and lies.



Don Lueders CRM is a passionate Records Manager, Product Manager, Sales Engineer, Solution Architect and Consultant with nearly 20 years of experience delivering Enterprise Content Management, Records Management and Information Lifecycle Management solutions to organizations in both the private and public sectors. This series of articles was originally posted at his [Next Generation Records Management](#) blog.



The Four Lies Destroying Records Management

#3: Security vs. Access

A few weeks after the discovery of the Sunburst data breach the BBC interviewed Brian Lord, the former deputy director of cyber-operations at the UK intelligence agency GCHQ.

Mr. Lord agreed that the cyber-attack that compromised multiple US Federal agencies, including the Departments of Treasury, State, Homeland Security, and Energy, was a devastating loss of government information. However, he said, "I think it is fair to say that the additional layers of security around top secret and highly classified [records] will be protected by internal controls, so direct access to those is unlikely."

What internal access controls was Mr. Lord referring to? Who is responsible for those access controls? And, most importantly, what would happen to sensitive and classified Federal records if those access controls were never actually implemented?

When it comes to information lifecycle management – the work records managers have performed for thousands of years – 'security' and 'access' are two very different things.

Not long ago, in the days when recorded information was almost exclusively preserved on paper, security was the fence, razor wire, video cameras, and barred windows surrounding the company records centre; access was the corporate records manager verifying a person who wanted to view a company record had permission to do so.

Electronically stored information is no different. A typical corporate IT system has a long list of both hardware and software security solutions for their networks. Firewalls, anti-virus protections, white-listing, blacklisting, network segmentation solutions, encryption tools. The list is virtually endless.

But, as recent news has shown again and again, no combination of these security solutions has proven to prevent determined and well-funded bad actors from

gaining entrance to some of the world's most secure networks. This is where the access controls that an organization's records managers are responsible for play a critical role in mitigating the damage done by a data breach.

For the last two and a half decades, virtually all 'records management applications' sold to US Federal agencies have been modelled on (and certified against) the DoD 5015.2 Electronic Records Management Software Applications Design Criteria Standard. In fact, DoD 5015.2-certified solutions are the only applications specifically mentioned in the Federal regulation describing appropriate record-keeping systems for agency electronic records, 36 CFR § 1236.20.

Here is how the DoD 5015.2 Standard defines 'access control':

DL1.2. Access Control. The term "access control" has the following meanings:

DL1.2.1. A service feature or technique used to permit or deny use of the components of a communication system.

DL1.2.2. A technique used to define or restrict the rights of individuals or application programs to obtain data from, or place data onto, a storage device.

DL1.2.3. The definition or restriction of the rights of individuals or application programs to obtain data from, or place data into, a storage device. Types of access control methods include Mandatory Access Control and Discretionary Access Control (Reference (c)).

DL1.2.4. The process of limiting access to the resources of an AIS to authorized users, programs, processes, or other systems. (DL1.15)

DL1.2.5. The function performed by the resource controller that allocates system resources to satisfy user requests.

The Standard has numerous requirements for implementing access controls in a certified records repository. As an example, here is an access control matrix used by the Defense Information Systems Agency in DoD 5015.2 baseline certification testing:

Full Name	User ID	Password	Clearance Level	Project Name Access	Supplemental Markings Assigned	Set Up In	
						OS	RMA
Rangel, Jan	rangej	rrRRR111rr	TOP SECRET	Project A Project B Project C	CMIKRON NATO THORS HAMMER FRD RD		
Martinez, Dan	martinezd	mmMM111mm	TOP SECRET	Project A Project B Project C	CMIKRON NATO THORS HAMMER FRD RD		
Rogers, Josh	rogersj	rrRRR111rr	SECRET	Project A Project B	NATO THORS HAMMER FRD RD		
Franco, Dustin	franco d	ffFF111ff	SECRET	Project A Project C	CMIKRON NATO THORS HAMMER FRD RD		
Smith, Guido	smithg	ssSS111ss	CONFIDENTIAL	Project A	NATO THORS HAMMER FRD RD		
Ly, Ann	lyaj	llLL111ll	No Clearance	Project A Project C	THORS HAMMER		
Harris, Earl	harris e	hhHH111hh	No Clearance	Project C	NATO THORS HAMMER		
Sandy, Diane	sandyd	ssSS111ss	No Clearance	Project C	CMIKRON NATO		
McNeil, Helen	mcneilh	mmMM111mm	SECRET		CMIKRON NATO THORS HAMMER		
Bayless, Betty	baylessb	bbBB111bb	CONFIDENTIAL		CMIKRON NATO		

Notice these test users are assigned three levels of access control: a 'Clearance Level', a custom metadata-based level (in this example, based on a user-defined field called "Project Name"), and a 'Supplemental Markings' level.

(Continued on Page 40)

#4: Records vs Non-Records

Years ago, when I was still somewhat new to records management and I was struggling to form my own understanding of the information lifecycle, I was working as a consultant and technical sales rep for a small software vendor that created and sold an 'enterprise records management application'. The bulk of our customer base were US Federal government agencies and I dutifully followed the government's documented philosophy that some pieces of recorded information could be categorized as 'records', while some other pieces of recorded information could be categorized as 'non-records'.

When I would demonstrate the email records management functionality of our application, I would often use an email invitation to lunch as an example of a 'non-record' that would not require preservation in our solution based on Federal records management regulations.

Over time, the "Let's Go to Lunch" email became something of an industry standard for understanding the concept of what type of Federal agency information constituted a 'non-record'.

But as I began to learn more about the records management discipline, I became increasingly troubled with the notion of calling *any* recorded information a 'non-record'.

Labelling something a non-record implies that the information doesn't have value and isn't worthy of the rigorous business rules required of effective information lifecycle management.

But all information is recorded for a reason and who's to say that any single piece of information isn't valuable at any given time?

Take the "Let's Go to Lunch" email as an example. Sure, it sounds meaningless at first glance, but what if the invitation was sent by a male Corporate Vice President to one of his female subordinates?

And what if it was the *twentieth* email he sent to her over the last few months asking her to go to lunch? And what if the subordinate eventually files a lawsuit claiming a long history of sexual harassment by the Vice President?

Wouldn't that 'non-record' email have enormous value to that woman and shouldn't it be preserved for some commonly accepted period of time?

Legally speaking, whether you call a piece of recorded information a 'record' or a 'non-record' is meaningless because it is *always evidence* and it is *always discoverable* in a civil matter.

But those people bent on destroying records management want you to believe that labelling information as a 'non-record' frees them of their responsibility to preserve and manage that information.

This way they can protect themselves from

The truth is still the truth, even if no one believes it. A lie is still a lie, even if everyone believes it.



prosecution when potential evidence of their misbehaviour is 'lost' or 'deleted' by claiming it was a 'non-record', and so they did nothing wrong by not preserving it.

As I noted in a previous post, the Federal government defines a 'record' as "all recorded information." This was a small modification to the definition made in 2014 that had profound ramifications for Federal agency records management.

How is it possible now to continue to separate Federal agency information into 'records' and 'non-records' based on this new definition? The truth is, you can't.

But sadly, at many agencies (and far too many organizations in the private sector), the practice persists. This policy has to stop if any organization is ever going to be able to effectively manage their recorded information.

But, perhaps surprisingly, this is actually good news for records managers. This is because managing the lifecycle of *all* of an organization's recorded information is safer, more efficient, and less costly than dividing that information into 'records', to be managed, and 'non-records', to be ignored.

This is true for a long list of reasons. Here's one. On the following page is a decision tree used for many years at several US Federal agencies that is intended to help an agency information worker determine if a particular piece of recorded information is a 'record' or a 'non-record' (redactions are mine, and made to prevent the identification of any single agency):

Amazingly, agency information workers were trained to pass *every piece of recorded information* they created

(Continued on Page 40)

"Being in a minority, even a minority of one, did not make you mad. There was truth and there was untruth, and if you clung to the truth even against the whole world, you were not mad."

Winston Smith, Records Manager, Ministry of Truth: George Orwell, 1984

#4: Records vs Non-Records

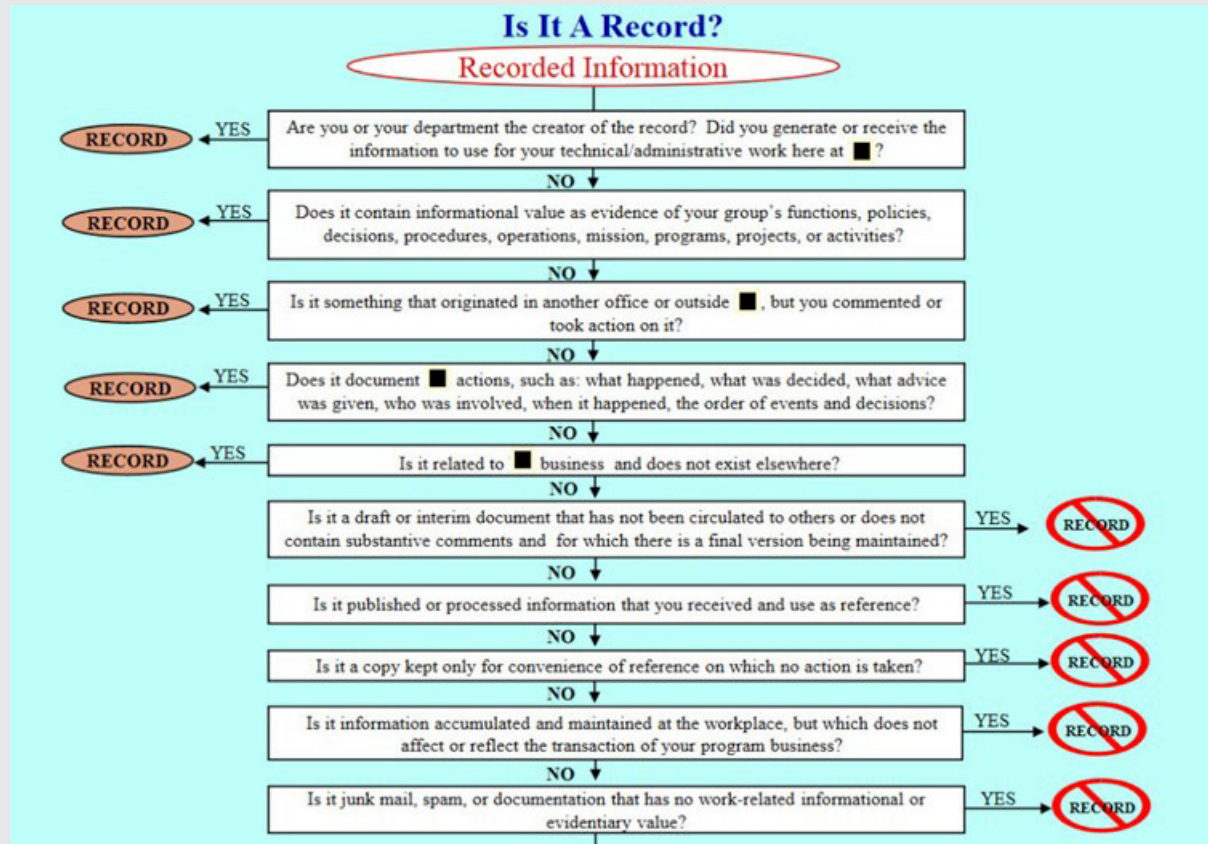
(Continued from Page 39)

or received through this complicated workflow, just to determine if the information was a 'record' or a 'non-record'. This included emails, instant messages, text messages, unstructured content, even voicemail.

Think of the amount of information you generate at your job. How much time out of your day would it take you to run each of those pieces of information through this workflow? All that time would be wasted given that there is no real value in labelling a piece of information a 'record' or 'non-record'. Eliminate that

requirement and the information worker would have much more time to do the important work he or she is paid to do.

Categorizing a piece of recorded information as a 'record' or a 'non-record' is one of the many relics of a paper-based records management program that has no real value in a digital information environment. Discontinuing the practice would significantly improve any organization's information lifecycle management capabilities and should be standard policy everywhere.



Lie #3: Security vs. Access

(Continued from page 38)

All three of these different forms of access control are required for baseline certification.

In a DoD 5015.2-certified solution, a records manager can apply these controls in an infinite combination to single records, record sets, folders, and subfolders throughout the repository's file plan. And if a bad actor breaches the organization's information security system, these controls will prevent them from gaining access to any information in the repository. These are the "internal controls" Mr. Lord was referring to when he was asked about the Sunburst data breaches.

But what if *no* Federal agency (including NARA!) ever actually implemented a DoD 5015.2-certified solution in a production environment, as detailed in this February 2020 article in the Epoch Times?

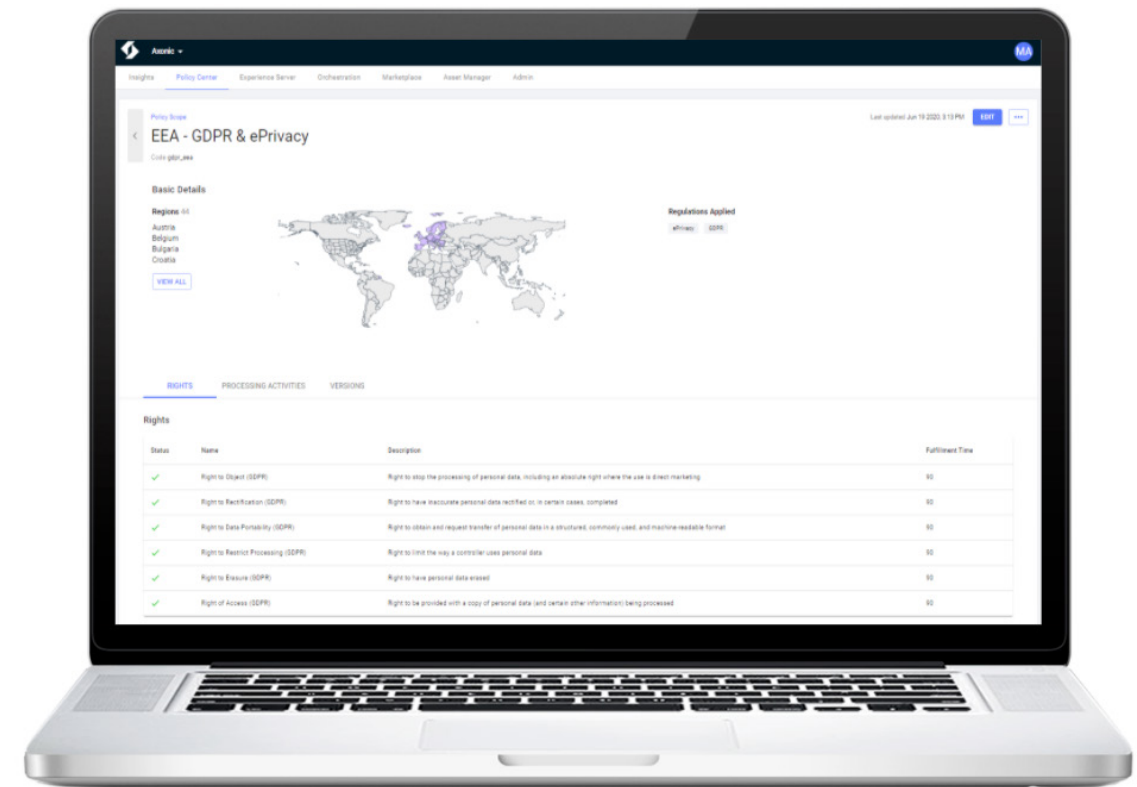
Tragically, it would mean none of these critical access

controls were ever applied to any of the agency's recorded information, and anyone who circumvented the agency's network security system was free to wonder around the agency's records sources stealing, modifying, or destroying information at will.

It would also mean the 2015 OPM data breach, the Sunburst cyber-crimes, and now the thefts of Microsoft Exchange email records by state-sponsored Chinese hackers are exponentially more destructive than anyone in the tech industry or the government is willing to admit.

The enemies of records management want you to believe that 'security' and 'access' are the same thing because they want unrestricted control of the world's most valuable commodity: information. Until the access controls that are the responsibility of an organization's records management program are consistently applied to records across the enterprise, the world's most critically important information is at a terrifying level of vulnerability and the these devastating data breaches will continue unabated.

Global Dynamic Data Compliance solution



Announcing \$US23M in Series A funding, Ketch is promising a new way for businesses to automate data privacy and security. The company's applications offer customers dynamic data compliance that can be implemented in as little as three hours and is already live with more than 20 customers.

"Today, too many companies believe they face a zero-sum tradeoff: capture and use data to grow, or comply with regulations and sacrifice growth," said Tom Chavez, CEO and Co-Founder. "Ketch gives them intelligent, policy-managed infrastructure to survive and thrive by capturing data responsibly at every consumer touchpoint while ensuring compliance, control, and security wherever the data lies, however it's used.

Claiming that other data privacy and security companies offer a facade of data privacy, Ketch says it instead does the heavy lifting of enacting privacy 'behind the screen' by orchestrating privacy preferences from consumers programmatically into internal systems and external platforms (customer relationship management, e-commerce, martech, analytics, etc).

Similar to how online advertising evolved from the hard-wiring of ads on web pages to a dynamic, fully automated system today known as the 'ad server,' Ketch is automating data privacy and governance through a coordinated set of applications, infrastructure, and enabling APIs.

Ketch's set-it-and-forget-it approach allows enterprises to capture consumer consent and permissions for data usage, define policies for capture, usage, and control of data, and comply everywhere without laborious reset and reconfiguration. The system's architecture automates the collection and use of consumer data to ensure total compliance in the face of rapidly shifting

data regulations and consumer privacy expectations. The company's solutions include:

- Streamlined Regulation Management: Leverage a single framework to manage complex global privacy programs by specifying, initiating, and enforcing the right privacy program for every consumer in every region

- Cross-Channel Consent Management: Consolidation and enforcement of consumer consent data across all platforms (desktop, mobile, IoT, tablet, OTT, etc.)

- Ultra-Scalable Fulfillment of Data Subject Rights Requests: Automated capture and completion of DSR requests in real-time with no human intervention

- Granular Data Security and Control: Hack-resilient security and data governance that prescribes the permissible uses of data at the level of rows, columns, and cells - as opposed to tables and clusters.

- Ketch Data Permit with Encryption: A universal "Permit" that not only encrypts data for security but also informs how to use data, ensuring continuous compliance with regulations.

Ketch is led by co-founders Tom Chavez and Vivek Vaidya, who have spent more than two decades building leading data platforms, including Krux (acquired by Salesforce) and Rapt (acquired by Microsoft). Using their experience building platforms that captured, analysed, and activated consumer data, Chavez and Vaidya are now turning their attention to helping companies responsibly and safely use that data.

The news comes on the heels of Ketch's recent launch of PrivacyGrader.com, a free privacy score that helps businesses measure risk in privacy compliance. Companies interested in learning about how Ketch can help them protect their customers' data privacy and security should visit <https://www.ketch.com/>

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

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

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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:

- initiate intelligent automated processes;
- accelerate document delivery;
- minimise manual document handling;
- capture critical information on-the-fly; and
- ensure standards compliance.

FileBound
Solutions

Tel: 1300 375 565
Web: www.filebound.solutions
www.filebound.solutions/contact

FileBound Solutions offers cloud-native, work automation and document management solutions that can be used to underpin any organisation's digital transformation program. These solutions are based around the FileBound software platform and are able to be deployed in organisations of all sizes. The solutions can include capture, document management, workflow, electronic forms, analytics, mobile access (IOS and Android), advanced business system integration capabilities and much more. Solutions from FileBound Solutions deliver

organisational efficiencies, drive out manual paper-based processes to decrease costs, increase productivity and support compliance with internal and external mandates. FileBound Solutions customers have the flexibility to create a variety of solutions from complex AP automations to simple document archival and retrieval processes.

iCognition

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

Tel: 1300 474 288

INFORMOTION
SMARTER SAFER FASTEREmail: info@informotion.com.auWeb: informotion.com.au

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

Kapish
a Citadel Group Company

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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.

Kodak alaris

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

OPEX

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OPEX is a recognised global technology leader in document imaging, high-speed mailroom automation and material handling. Since 1973, OPEX systems have provided performance enhancing workflow solutions and cost-effective results to thousands of organisations worldwide. OPEX systems are designed for a wide variety of industries including financial services, insurance, healthcare, government, retail, non-profits, utilities, telecommunication, service bureaus, educational institutions, and fulfilment operations. OPEX has developed innovative prep reducing scanners that address the root causes of workflow issues our customers face. Minimising preparation, paper handling, and other manual tasks not only improves efficiency, but also results in superior transaction integrity and information security. As documents are removed from envelopes/folders and scanned, operators can view each image to ensure it is properly captured. This prevents time-consuming and costly re-scanning later in the process. Moving image capture upstream also reduces information management risks.

Tel: 1300 790 360

UPFLOW

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UpFlow is a channel-first provider of Document Capture, RPA, Document Management, Workflow, Electronic Forms and Integration software products and services. UpFlow distributes and resells products such as 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.

UpSol

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UpSol are experts in Digital Transformation and Business Process Re-engineering with strong domain expertise in Data Capture, Document Management, Organisational Workflow, Electronic Forms, Data Integration and organisational change management. We use this expertise to deliver solutions for problems in Accounts Payable, Human Resources, Contract Management, Digital Health Records, Client Management, School Management and many other core work processes

Today's a Good Day for AR Automation

By Diana Eagen

In an increasingly uncertain world, getting everyone to maintain sustainability and cash flow is essential. Most companies face a wait time receiving customer payments that could range anywhere from 30 to 90 days to even longer.

Payment delays not only cause anxiety for the collections management team, but they impact your cash flow. The bottom line is simple - the more quickly you collect your accounts receivable (AR), the better your cash flow situation will be.

You have undoubtedly heard about or have automated certain business processes already. By automating wherever possible, you're looking where you can leverage technology to compliment your existing ERP or finance solution, and reduce labour-intensive administrative tasks, thus operating much more efficiently in the process.

AR automation transfers invoicing to a digital process that sets you up to receive multiple forms of payment and handles what is usually labour-intensive deductions, accurately applies cash, and captures and prioritizes collections efforts.

In addition, AR automation allows you to:

- Create customer invoices based on your company's data or simply upload an ERP-created file of invoice PDFs to send and track electronically or via postal mail.
- Invoices and other AR documents can be delivered on-demand according to the customer's preferences.
- Customers can access a convenient online portal to view invoices, pay their bills, get support, and more.
- Managing post-sale collections is made easier with tools such as task escalation, root cause analysis, and more.

Finally, AR automation also supports numerous types of collections strategies and is set up for internal collectors based on the collections rules and approach unique to your company.

The benefits of AR automation are numerous and impossible to ignore after you have experienced them firsthand. Here are the main reasons to consider implementing this year:

■ **Faster Payments** - If you're accustomed to dealing with clients who tend to pay your invoices at their leisure, then you're not alone. This is just one of many reasons to consider automating your AR processes as soon as possible. The enormous benefit of automation is that e-invoices are made available for customers to pay immediately. This eliminates delays in payment that might have previously been common. AR automation can help you speed up your invoicing so you get paid faster.

■ **Improved Customer Experience** - A benefit of AR automation is an enhanced customer experience. Your team is better able to focus on more strategic and detail-oriented tasks. When it comes to AR-related customer data, you know the more you can do to merge things for greater visibility, the better customer service you can provide. When it comes to inaccurate invoices



or collections issues, AR automation technology allows you to quickly address any issues that may arise. By implementing technology in your AR processes, you are giving yourself a valuable tool that allows you to provide stronger customer service. Because of this enhanced customer experience, you can expect improved customer retention and a decrease in customer service-related problems.

■ **Cost Savings** - Studies have shown that e-invoicing saves approximately \$8 per invoice sent. This cost reduction might come as a surprise. However, the decrease reflects cost savings in several areas, such as postage costs, manual handling of paper invoices, cost of paper, envelopes, and equipment used in the printing and posting process. By implementing invoice delivery automation, your company can cut costs where you never could before. In time, the sizeable cost savings will be worthwhile to leverage technology to your benefit.

■ **More Control & Visibility** - Another benefit of AR automation is the added control and visibility you and your team will gain. Invoicing and international e-invoice compliance, automated payment reminders, online customer payment, automatic cash application, collectors outreach and workflow, and capturing dispute reasons are just a few of the AR automation functions that allow real-time visibility and reporting. Improved visibility provides the insight you and your team can act on.

You may still have reservations about making the switch from the manual processes you've always known and feel comfortable and familiar with. Change can sometimes be scary. Look at automation technology as something that can easily be adapted to your business needs. Opt for software that's simple, intuitive and closely matches how you already do business. Consider automating your AR and collections process — it's a more predictable and repetitive sequence of activities that provides benefits from end to end.

Want to learn more about automating your AR processes? Check out this [whitepaper](#) for more information or visit our website, <https://www.esker.com.au/>

Diana Eagen is the Director of Sales for order-to-cash solutions at Esker North America.



COLLECTIONS AND CASH ALLOCATION

EMPOWER YOUR AR TEAM & REDUCE PAST-DUES

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.



Reduce DSO

Automate your collection strategy with invoice delivery, rule-based task lists & more.



Improve Visibility

Get real-time insights into key AR metrics & collections performance.



Free Up Staff

Empower your AR team to focus on strategic customers or reporting.



Improve CX

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

WHY ALLOCATE CASH WITH ESKER?

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.

- Improve accuracy and streamline cash application process
- Increase productivity for AR teams
- Enhance visibility on cash likely to be received in near future and your total receivables
- Speed up deductions and/or dispute identification

A UNIQUE USER EXPERIENCE

Simplify your cash application process with all payment information visible from one interface:

- Extracted information from payment files
- Check and/or remittance image
- Invoices and highlighted suggestions for matching invoices with payment or remittance
- Help messages and resulting explanations
- Dedicated adjustment entries section
- Direct link to customer accounts

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

Esker Australia Pty Ltd • +61 2 8596 5100 • info@esker.com.au

APPS & APPLIANCES

Colortrac adds new Scanners and Software

Colortrac has introduced new large format scanners, the SmartLF SGI and SmartLF SCi, along with new scanning software, SmartWorks Imaging, to support them. The new scanners are available immediately through Colortrac distributors worldwide.

The SmartLF SGI and SmartLF SCi scanner series are designed for capturing, enhancing, sharing, and copying information from large format documents of all types, such as hand-drawn originals, old plans, marked-up construction drawings, textured artwork, thick media, and more.

“The new functionality, including the ability to drive the scanner from a tablet, brings the full power of large format scanning right into the hands of our customers,” said Jacob Bendix, Chief Commercial Officer, Colortrac.

The scanners deliver fast performance, with optimized preset controls and an extended list of internal printer drivers to connect directly to large format printers. SmartWorks Imaging, the newest member of the SmartWorks software family, is a fresh implementation of the scan-once workflow that is easier to navigate than its predecessor, SmartWorks Pro.

Colortrac’s new SmartWorks Imaging scanning software offers a host of new features including a new multi-page thumbnail pop-out view, extended PDF for longer and wider documents, and higher dpi.

With a new interface, the scanning software also boasts a number of new capabilities such as closed-loop printer colour calibration, quick-fix image correction tools, and a full edit history for one-click easy undo. SmartWorks Imaging is also dongle-free and includes new drivers for HP and Epson drivers.

SmartWorks Imaging users can download the free SmartWorks Imaging Link, an app that lets users operate the scanners by remote control from a tablet. (Tablet not included.) SmartWorks Imaging Link puts the full power of the PC-based SmartWorks into the hands of a tablet user.

The SmartLF SGI scanners are suitable for any type of document, including technical drawings, maps, artwork, and photographs. With the CCD technology and greater focal length, it can even handle originals with texture, and media up to 15 mm thick.

The scanner series delivers realistic colour and superb accuracy (up to 1200 optical dpi). Available in 36- and 44-inch widths, the scanners are designed to work at high speed while requiring little maintenance.

The SmartLF SCi scanners are ideal for engineering drawings, construction plans, maps, and line drawings. The scanners feature Colortrac’s innovative ClearView technology, a line of up to 144 LEDs to guarantee maximum scanning accuracy.

A SUREDRIVE powered soft roller provides even pressure across the original, while the SuperSpeed USB 3.0 interface ensures fast, efficient data transfer.

The SmartLF SCi scanners are available in 25-, 36-, and 42-inch widths. Both the SmartLF SGI and the SmartLF SCi come in a black/dark gray colour, with matching optional floor stand and PC mounting kit.

<http://www.Colortrac.com>

Clarifai expands AI product portfolio

Clarifai has announced a set of new offerings based on its deep learning AI platform for managing unstructured image, video, text and audio data.

Clarifai’s new product line-up includes the following:

■ **Scribe Label:** A data labelling platform or fully managed data labelling service that uses AI automation to speed productivity of high-quality training datasets by 100x with 10x less data needed. Recently released are new features for video labelling, polygon-interpolation and task review for large workforces.

■ **Spacetime Search:** An AI-powered, visual search engine that automatically indexes unstructured data for deep search and management. It searches for visually similar images and custom concepts in images, video and textual data and includes an intuitive user interface for bulk operations, sorting, and filtering data. Spacetime allows for deeper search into multilingual text inputs, including custom concept search and text similarity search.

■ **Enlight Train:** A rich suite of pre-trained models used to train and produce highly accurate custom models with support for a variety of different training types such as transfer learning and deep training. Custom model training can be done from a simple portal UI or through APIs. Neural networks can be built in minutes as complexities are abstracted away, exposing only the “key” essentials.

■ **Armada Predict:** A tool that analyses unstructured image, video and text data using multiple prediction types to gain insights with fast time-to-accuracy. The tool can manage thousands of model instances simultaneously, and includes a new logo detector, weapons detector and a general text token classifier detector.

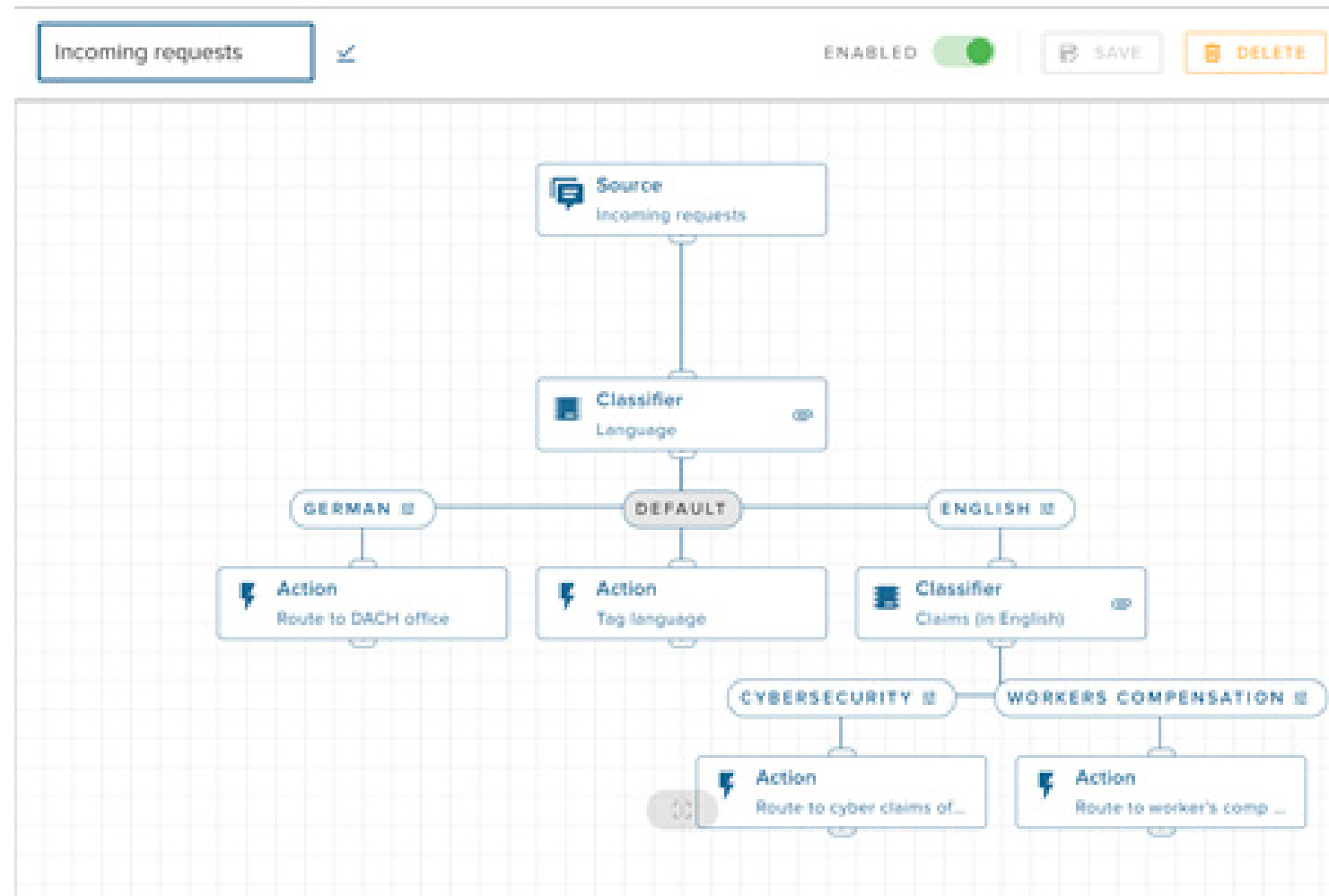
■ **Mesh Workflows:** An architecture that connects AI model “building blocks” to perform complex operations on data, express complex business logic and build solutions that target specific business needs. Mesh handles multi-modal AI workflows, automated data annotation and event triggers. New workflows just released to Mesh last week include a face detection workflow and Object Character Recognition (OCR) workflows for scene detection and document detection.

■ **Flare:** An Edge AI platform that accelerates intelligent video applications from streaming, decoding, batching and inference to on-screen display/metadata output. Flare features a secure air-gapped deployment option and high accuracy for object detection and tracking.

<https://www.clarifai.com>

APPS & APPLIANCES

Cortical.io targets Message Processing



Cortical.io has announced Message intelligence 2.1, an intelligent document processing solution (IDP) that provides high accuracy in filtering, classification, and extraction of emails, attachments, and other types of unstructured documents.

Cortical.io’s Message Intelligence solution is designed for situations where large quantities of messages and documents come in daily through emails, website submissions or social media. Examples are submission processing for the insurance industry, business process outsourcing for the transportation industry, customer service for financial institutions and billing processing for large organizations.

These organizations interact through a variety of channels and documents including emails, attachments, text feeds and social media and can make enormous profitability gains by automating these interactions.

Leveraging Cortical.io’s patented method for natural language understanding (NLU), Message Intelligence 2.1 promises fewer false positives, less manual intervention saving time and money. The company claims it requires far less material to train custom classifiers and extraction models, making time to production/value a fraction of other tools available. This is particularly valuable around situations where there is a lack of training material.

The product allows a user to effortlessly create pipelines to intelligently process documents. A key capability of Message Intelligence 2.1 is that it allows a subject matter expert to easily create pipelines with components including inputs, filters, classifiers, extractions, and actions.

The product comes with easy-to-use tools for building classifiers and extraction models, so that subject matter experts do not need the intervention of AI experts or data scientists to adapt the system to the specific classification and extraction needs of their organization.

“Corporations are overwhelmed with the wide range of interactions with a variety of external stakeholders – be it via emails, web contact forms or social media messages,” said Thomas Reinemer, COO at Cortical.io.

“In today’s market, everyone expects quick responses. Speed and agility have become critical to stay competitive. Assuring these interactions are compliant with regulations is also an issue in certain verticals such as insurance, banking, and financial services.”

Pricing is based on volume of emails and/or documents processed.

<https://www.cortical.io/>

iText DITO 2.0 for template-based PDFs

iText has announced the availability of iText DITO 2.0, the next generation of its template engine that converts data into PDFs. This release adds the iText DITO Manager for a workspace control room experience and a central repository for all templates, data collections and resources.

DITO Manager enables users to efficiently manage the full lifecycle of templates and all their dependencies, including data collections, images, stylesheets and fonts. With the inclusion of promotion paths, versioning and user management, there is no limit to the number of templates that can be effectively managed.

The iText DITO Editor has been optimised to integrate with the Manager experience and it benefits from a UI make-over, as well as the addition of several new features. Likewise, the PDF generation REST API has also been optimised to integrate with iText DITO Manager.

Due to the tight integration between the Editor, SDK and new iText DITO Manager in this release of iText DITO 2.0, the native Java flavour of the SDK is deprecated to instead focus on further development of the Dockerised REST version. iText DITO Manager introduces the concept of a workspace in which templates, data collections and additional resources are stored and deployed. The workspace manages users and security roles, connected SDK instances and users' template promotion pipeline.

In the data management area of iText DITO Manager users can create and maintain reusable data collections. These are data structures, extracted from JSON files which can be uploaded and associated with one or more templates. To preview the templates with relevant data at design time, data samples can be added to data collections. Versioning, permission management and dependency control are available on all data collections users create.

In iText DITO 2.0 there are four different types of templates: the self-explanatory standard, header and footer templates, and compositions, which are combinations of the other three types of templates. Compositions allow for the reuse of headers, footers or body sections across a variety of different output documents.

Just like data collections, templates have a full audit trail, permission settings and a dependency list. They can be promoted from dev to production along the different stages of users' workspace promotion path. As this occurs, they are automatically deployed to the connected SDK instances.

Templates often contain more than just content. Layout resources like images, stylesheets and fonts are also managed in iText DITO 2.0, meaning they can be reused across multiple templates. From a content management perspective this allows users to update the look and feel of multiple templates at once, by updating the images and styles they share.

www.itextpdf.com

Elastic Accelerates Investigation Workflows

Elastic, the company behind Elasticsearch and the Elastic Stack, recently announced several new features that accelerate investigative workflows and reduce mean time to insight (MTTI) and mean time to resolution (MTTR) for users.

The new service health overview in Elastic APM accelerates root cause analysis and troubleshooting by aggregating key aspects of service health into a single view. Developers and reliability engineers can quickly troubleshoot service issues and identify the root cause with minimal context switching.

A new resource heatmap in Elastic Metrics adds an enhanced view that presents host health in a single panel, streamlining infrastructure monitoring and troubleshooting workflows. The heatmap gives a bird's-eye view of the state of a user's infrastructure, making it easy to quickly spot troubled resources and narrow down the next steps of an investigation by pinpointing hosts that need closer inspection.

In addition, Elastic Common Schema (ECS) logging libraries are now generally available to help users deepen application observability with automatic linking between application logs and traces.

Logging libraries in ECS make it easy for application developers to automatically inject the trace context captured by the APM agent into their application logs, enabling the log-to-trace correlation required for streamlined analysis.

Exela adds compact enterprise scanning

Exela Technologies has announced the launch of the IntelliScan Raptor scanner, the latest addition to its line of document digitization and data extraction platforms. The Raptor combines throughput of up to 240 pages per minute, high image quality, flexible paper handling, and single or three-pocket sorting capabilities in a table-top sized machine.

It is designed for organizations with mid to high volumes of documents such as service bureaus, banks, insurance companies, healthcare organizations, and government agencies.

Exela's IntelliScan products are manufactured in the US and Asia, enabling global production capacity located near its end markets. The Raptor will be sold by Exela and via global reseller channels. Delivery and support will be provided by Exela's service organizations in North America, Europe, and Asia, and through trained reseller partners for the rest of the world.

The Raptor, along with the entire IntelliScan line, can be paired with Exela's robotic process automation and cognitive automation tools, such as Exela's OpenBox software, to create a complete document digitization, data extraction, and classification solution.

<https://exela.digitalnow.com/intelliscan-scanners>

Hyland Alfresco Content Services 7.0

Hyland has announced Alfresco Content Services 7.0 promising higher scalability, strengthened compliance, improved search performance and easier upgrade paths to help organizations across the globe transform business processes and better support remote workforces.

As businesses globally struggle to control content sprawl, the explosion that comes from both human and machine generated unstructured content, enhancements within Alfresco Content Services 7.0 allow organizations to manage large content volumes at reduced costs.

"More organizations are struggling with digital transformation initiatives because of the lack of control over unstructured content and an absence of skilled resources to modernize their technology infrastructure," said John Phelan, EVP and Chief Product Officer at Hyland.

"This latest release solves these challenges with improved scalability to manage the influx of unstructured content within an organization that is optimized for performance at scale."

Furthermore, Hyland launched an early access program for Elasticsearch as an alternative search engine to Solr. John Phelan continued: "Introducing Elasticsearch demonstrates the speed and agility by which the team can present a new core service to the platform, and helps offer choice to our customers for an important service for every content solution."

New functionality in Alfresco Content Services 7.0 includes:

- **Cloud Native** – the modular approach provides customers with an auto-scalable content services platform that can handle the growing volume of unstructured content and billions of documents
- **Extensibility** – Hyland enhanced developer experience with the new Alfresco Events SDK to speed the development process and realize a faster time to value
- **Security & Governance** – Organizations can reduce business risk and strengthen compliance with auto detection and tagging of Personal Identifiable Information (PII) in documents, enabling easier privacy management to comply with data protection regulations
- **Scale** – End users can locate the exact content they need easily and quickly with highly scalable direct searches, even in largest repositories
- **Open Source** – Hyland's continued commitment for open standards and APIs empowers organisations to easily integrate and customize solutions to meet their business needs. Additionally, all deployment scripts are available as open source to the Alfresco developer community
- **Create cloud applications through business workflow** – Organizations can easily create business solutions designed in a low-code modeller

environment which maps to content models, integrates with other cloud services and applications, and is deployed seamlessly to end users on web and mobile platforms

■ Support for enterprise-class records management and information lifecycle management – delivering a single source of the truth for all unstructured content in Alfresco or external repositories through Alfresco Federation Services

ACS 7.0 is available on Alfresco Cloud (PaaS) or for enterprises via self-hosted cloud or on premise deployment.

<https://www.alfresco.com/whats-new>

Content Manager digital signatures

Content Manager users now have the option to send documents for digital signing directly from within Content Manager, thanks to a new integration with Secured Signing, created by information management specialists, Information Proficiency.

Demand for digital signing has increased during COVID-19, as organisations look for a method that ensures the integrity of a signed document without having to print, manually sign, then post or scan to return.

The integration means that staff can initiate a document for signing directly from within Content Manager, and after it has been signed by one or more parties, the signed document will automatically be saved back into the record it was initiated from.

Many organisations are experiencing efficiency gains in both time and resource savings, as well as improved capture of signed agreements. Several councils no longer need to print a document for council packs and have eliminated associated courier costs.

A City Council using the new software integration has said "they've been waiting years for a solution like this".

"Now we can send documents for signing within Content Manager and once the document has been signed it gets checked into the right record location saving a lot of double-handling."

Digital signing in Content Manager through Secured Signing will not only mean it is quicker and simpler for users to sign, but it will also provide a clear audit trail of the signing process.

Mike Eyal, Secured Signing founder and Managing Director, says, "it is another amazing tool that Secured Signing provides to enterprise customers to initiate the signing process directly from their document management system. The integrated solution gives users the ability to implement most of Secured Signing's many features, as well as having a simplified one step login that creates efficiency and better control to manage the signing process in an all-in-one platform."

www.infoproficiency.com.au

Parascript offers enhanced AI smarts

Parascript has added new machine learning capabilities in its updated FormXtra.AI 8.0 Intelligent Document Processing (IDP) product.

■ NLP-based Full-page Handwriting

Transcription. 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.

■ **NLP-based Document Separation.** 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.

■ **Dynamic Multi-line Field.** 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.

■ **Hybrid Field Type.** Parascript has the ability to automatically determine whether a field was text or handwritten alleviating the need for manual selection of the data type. It now adds 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.

■ **Easy-to-Use Classification UI.** 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.

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.

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.

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

Limitless Forms in NITRO Studio 2.0

Crow Canyon Software has announced the release of NITRO Studio 2.0, an update to its business automation platform for Microsoft SharePoint and Office 365.

NITRO Studio 2.0 comes with unlimited workflows and forms, making it substantially easier for organizations to control the costs of business process automation.

The 2.0 version includes new features and significant enhancements that make it easier and faster for business analysts, IT professionals, and power users to replace outdated processes, such as InfoPath forms, spreadsheets, and paper forms, with modern, mobile-friendly solutions.

Notable new features include:

■ **Bot & AI Services** that drive self-service user support. The Bots are customizable and are fully compatible with Crow Canyon applications.

■ **Modern UI Web Parts**, a comprehensive set of add ins for SharePoint's Modern UI environment that allow the creation of engaging and responsive application pages in SharePoint.

■ **Full Integration with Microsoft Teams**, making it possible for users to work directly in Teams. Integration includes the ability to create channels, post adaptive cards, send Teams messages, use Teams Bots, and more.

■ **Improvements to NITRO's Forms Designer**, Workflow Manager, Actions, Reports, Dashboards, and Portals.

<http://www.crowcanyon.com>

Valtatech brings Centsoft's E-Invoicing Solutions to APAC

Valta Technology Group (Valtatech) has teamed with global accounts payable (AP) automation and invoice workflow management specialist Centsoft to drive back-office digital transformation among small and medium sized enterprise organisations in the APAC region.

The partnership will bring Centsoft's e-invoicing solutions to the region for the first time powering Valtatech's new Accounts Payable (AP) Cloud, which makes the automation of fundamental business processes accessible and affordable to many mid-market organisations.

Valtatech's pay-as-you-go, cloud-based AP automation model enables effortless scalability and allows businesses to enjoy the benefits of AP automation in less than 4 weeks, including:

Cost saving - reducing AP costs by cutting out manual data entry.

■ **Business continuity** - ensuring suppliers are paid on time keeping supply chains functioning with full visibility.

■ **Compliance and risk management** - all invoice approvals will remain compliant and in line with company policies, with a full digital audit trail.

■ **Flexibility during uncertainty** - a flexible and scalable pay as you go subscription that can be cancelled at any time.

■ **Data accuracy** - ensure users can access accurate accounts payable data to drive efficiency insights.

Jussi Karjalainen, Founder and Managing Partner of Valtatech, says: "Our partnership with Centsoft will ensure APAC businesses have access to, and can leverage, the right processes, skills and technology to transform a critical element of their AP process and make a simple transition to paperless invoicing."

Centsoft's e-invoicing software is currently used by over 10000 users and 1500 companies worldwide.

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

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Ultimus Digital Process Automation

Ultimus, Inc. has announced the latest release of its low-code application platform, the Ultimus Digital Process Automation Suite 2021. This new Ultimus version offers expanded AI/ML capabilities, faster solution composition, simplified end-to-end automation, improved user experience, comprehensive security, and tools for business owner control.

Ultimus Digital Process Automation Suite 2021 ("Ultimus DPA Suite 2021" or "Ultimus 2021") unites the three principal Ultimus product modules – Composed Process Solutions, Ultimus Adaptive BPM Suite, and Ultimus Advanced Task Service/WebClient (now "Ultimus DPA Portal") – into a cohesive digital process automation platform.

Ultimus' "prescriptive" low-code application development environment is a "software factory" that generates highly sophisticated, tailor-made software applications with exceptional speed, consistency, and quality.

Ultimus 2021 adds:

- Faster Composer performance and new Composer functionality to improve productivity and simplify reuse;
- New composable digital assets, packaged business concepts, complex controls, and integration adapters;
- New visual composition tools that enhance business/developer collaboration; and
- Ultimus DPA Solutions Starters - functional process automation solutions readily configurable to meet the most demanding enterprise requirements.

Enhanced Business User Control

Let's face it, business owners don't want to become developers, but they do want to adjust the drivers of their business – quickly, intuitively, and safely – without IT. Ultimus 2021 puts even more control into the hands of business with prebuilt, extendable CPS-based applications that:

- Manage business rules, approval matrices, catalogues, and process flows;
- Create and manage rich text and HTML email and document templates;
- Automatically launch processes or activities based on SLAs, events, schedules, emails, and messages; including bulk launches from Excel;
- Provide visibility into and manage access, cost, and usage of APIs, cloud servers, and services.

New End-to-End Automation Capabilities

Ultimus 2021 is all about end-to-end automation: increasing the value of automation by seamlessly integrating complementary intelligent automation technologies and extending processes beyond the enterprise. Ultimus 2021 includes:

- Built-in Artificial Intelligence and Machine Learning based data extraction and verification, sentiment and keyword analysis, and AI/ML model building capabilities;
- Configurable user self-registration and access and profile management capabilities that securely and efficiently extend processes to new users - both inside and outside the enterprise;
- Privacy capabilities that restrict sensitive process instance data from defined users or groups;
- Built-in blockchain anchoring for securing and authenticating documents and process records;
- New Ultimus Flobots – point-and-click "trained" automated user and machine steps that eliminate repetitive, error-prone tasks; simplify integrations; and reduce costs - without the need to license RPA bots.

User Experience Enhancements

Ultimus 2021 adds features and capabilities that optimize user experience, productivity, and engagement including:

- 20-55% faster form loading and full 64-bit performance throughout the platform;
- Dynamic, multi-level, role based DPA Portal navigation;
- In-portal user messaging, notifications, and reminders;
- Expanded process information: process playback, routing, and rule evaluation data seamlessly incorporated into end user process maps;
- Pre-localization of Ultimus digital assets, packaged business concepts, and applications;
- User access, self-help, and profile self-management.

Ultimus 2021 includes encrypted and single-use tokens for all user, server, database, and module communication plus TLS 1.2 support and AES-256-CBC encryption.

<https://www.ultimus.com/bpm-technology>

ibml launches new high volume scanner



ibml has announced the launch of the new ibml FUSiON 7200 high volume production scanner aimed at business process outsourcers (BPOs), shared service centres and enterprises that need to convert large volumes of documents and integrate them quickly into a variety of line of business applications and workflows.

Designed to process up to 285 letter pages per minute at 300 dpi, the ibml FUSiON 7200 is an extension to the ibml FUSiON series of ultra-high volume scanners launched by ibml last year and is specifically targeting the high volume production scanner segment.

Prior to the coronavirus pandemic, organizations commonly used desktop or departmental scanners to digitise in-coming mail or other documentation. With many office workers now asked to work from home, there is renewed interest in providing a centralised scanning approach for mailrooms – irrespective of the industry sector – to streamline and speed up the paper handling process, as well as progressing other digital transformation projects.

The scanning system includes ibml's image processing system – iQpro – which ensures quality scans first time, every time and provides automatic de-skewing, rotation, cropping and colour correction among other features. From a single scan, iQpro also allows simultaneous output of colour, greyscale and bitonal images.

Features include:

- A wide, open-track transport system able to cater for documents up to 34cm wide allows a range of documents and envelopes to be processed. In addition to a wider field of view, this allows the capture of corners of documents if they are skewed;

- The open-track system lends itself to easy document handling and access;
- Multi-feed detection with six ultra-sonic sensors to ensure dependable document handling across the document transport to catch misfeeds early in the process;
- Ergonomic document feeder controls to deliver higher operator productivity and comfort during long shifts;
- A hopper designed to take up to 1,500 sheets while allowing the continuous feeding and backfilling of pages as the scanner is running;
- Left justified feeding makes it easier to prepare mixed batches of documents;
- A motorized pocket to aid the neat stacking of documents once scanned. Like the feeder, it takes 1,500 sheets. Also included is a straight-through runout tray which enables exception documents of up to A3 size to be catered for and to sort out batch or document separators;
- Robust industrial design with separate airflows for paper transport and electronics safeguard the electronics from paper dust thereby enhancing reliability and system uptime for continuous operations;
- A range of optional accessories is available to add intelligence to the scanning process. These include a barcode reader, MICR reader for check processing, plus an inkjet printer to date/time stamp documents for audit trail and compliance purposes. A specialized pocket option is also available which is designed to handle delicate documents.

The ibml FUSiON 7200 scanner is priced from \$US89,000 with optional accessories.

<https://www.ibml.com/products/scanners/ibml-fusion/>

APPS & APPLIANCES

Open Source tool for Text Extraction

AI startup Sorcero Inc. is releasing a free open source software ingestion framework it calls Ingestum.

It supports sourcing and transformation of a wide variety of data and document types into a uniform document format.

"Data and Analytics executives tell us that unstructured documents are full of data they need but can't access. We want organizations to benefit from AI and ingestion is a significant barrier. We think open-sourcing Ingestum will democratise ingestion," said Dipanwita Das, Sorcero CEO & Co-founder.

Ingestion of arbitrary and unstructured content formats - PDF files, Microsoft Office documents, email threads, and so on - presents a challenge in the AI industry.

Sorcero claims the ingestion market is extremely fragmented with many niche players, and most AI firms handle the ingestion of unstructured text in-house. The Ingestum framework aims to provide a methodical, reusable, extensible, and scalable framework for ingesting content, free and open to all.

Written in Python and built around reusable, programmable pipelines, Ingestum - from the Latin word to ingest or toss in - is largely agnostic of both source and output formats; it is designed to be extended through the use of plug-ins, and it can be deployed as a command-line tool or as a web service.

Ingestum integrates existing FOSS projects such as PDFMiner, Google's Tesseract-OCR Engine, and Mozilla's Deep Speech speech-to-text engine.

"Ingestum leverages many existing open source projects, so no one has to reinvent the wheel; it can easily integrate existing workflows, or incorporate existing software as plug-ins," said Walter Bender, CTO and Co-founder of Sorcero

Sorcero—recently featured at the LOINC and InsurTech NY conferences - invites IT directors, software engineers, and AI researchers to download and use Ingestum today (git clone <https://gitlab.com/sorcero/community/ingestum.git>).

Process Intelligence with AI Analytics

Worksoft, a provider of end-to-end enterprise automation for complex custom and packaged applications like SAP, Oracle, Salesforce, Workday and more, has announced the expansion of its Connective Automation Platform to include AI-driven analytics capabilities.

The company offers a codeless, scalable automation solution that connects process intelligence, business process testing and production automation.

Combining multiple data sources - including process

mining, business process captures, test automation results, production performance, and more - Process Intelligence generates a real-time roadmap for automation and process optimization.

"This new level of Process Intelligence is a catalyst for CFOs and CIOs looking to unlock the full potential of their automation investment, providing them with a closed-loop view of their processes in real-time," said Tony Sumpster, Worksoft CEO.

"Process understanding is critical to driving digital transformation, and these platform enhancements reinforce our commitment to enabling real business change, uniquely bridging process understanding and business process automation in pre and post-production."

Key Process Intelligence Benefits:

- Realtime ROI - Identifies candidates for process optimization and automation, prioritized by potential and realized cost savings to extend existing automation value to prove immediate impact.

- Closed-Loop Automation - Uses AI-driven Process Intelligence to turn insights into automation and process optimization at the click of a button.

- 360-Degree Insights - Unifies real-time business and IT data insights from the broadest sources to deliver the best end-user experience and business outcomes.

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

Call Centre software links with Teams

Integration between Microsoft Teams and Australian cloud call centre platform, Premier Contact Point, promises to be a game changer for organisations providing customer support.

It allows customer support staff to view Teams Presence across the organisation, directly within the Premier Contact Point Agent Desktop and collaborate with them via Teams chat, whilst the customer is on the phone. The staff member can then easily be patched into a 3-way conference call with the customer, with just one click.

This integration provides a dramatic improvement in customer experience, as no longer will customers need to be transferred to another department, only to have to wait for someone to be available, then repeat their issue and possibly have to repeat the identification process.

"We've been using Microsoft Teams to facilitate team collaboration for quite some time, and we love it, as do many of our customers, which is why we developed the integration. We are thrilled with the positive effect this integration will have on the customer experience that people will have when they call a contact centre" said Sol Rabinowicz, CEO of Premier Technologies.

"They'll receive comprehensive help in a collaborative way and have their queries and needs taken care of far more efficiently.

Customer support staff will be able to draw upon expertise from colleagues throughout their organisation, which will significantly improve first call resolution rates, reduce average call handling times and cut queue wait times."

The integration not only makes collaboration easy for teams, it means that customer support staff no longer have to toggle through a myriad of screens on their desktop. Everything they need is in the Premier Contact Point Agent Desktop.

The integration makes it quick and easy for customer support staff to search for help with colleagues who have the right expertise, and to view their Presence status.

And as both platforms are cloud-based, it means all team members have access, no matter where they are working. This is ideal for the many contact centre agents currently working from home.

When combined with features like automatic call distribution, digital self-help tools, call recording and real-time dashboards, the Premier Contact Point and Microsoft Teams integration ensures customer support teams are equipped with everything they need to collaborate with everyone and deliver outstanding customer service.

<https://premiercontactpoint.com/>

Plustek adds new Workgroup Scanner



Plustek Technology has announced the availability of the SmartOffice PS3180U document scanner. This 80-page per minute scanner features a duty cycle of 8,000 pages per day, 100 sheet automatic feeder and can scan both sides of business documents in less than one second.

Plustek designed the PS3180U for healthcare, financial, legal, government agencies, education, construction, manufacturing, document management or any digital transformation task.

It also scans ID cards and business cards up to 1.2mm thick. Automatic image processing provides finely detailed images that are small in size with highly accurate Optical Character Recognition rates. Built-in ultrasonic misfeed detection prevents paper jams and double feeds before they happen.

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The included industry standard TWAIN drivers ensure compatibility with all image enabled and document scanning applications including those from Cerner, Epic, LaserFiche, Docuware, and others.

"The SmartOffice PS3180U is ideal for customers that need to scan large volumes of documents all day, every day." Said Johnson Yang VP of Plustek Americas region.

Key Features of the SmartOffice PS3180U:

- 80 page per minute duplex colour document and ID card scanner
- 100 sheet document feeder
- 8000 page per day duty cycle
- Built-in automatic image processing
- Single touch scanning
- Scan Plastic Cards up to 1.2mm thick

Zapier launches new Teams integration

Workflow automation developer Zapier has announced improved integration that allows Teams users to connect with 2,000+ apps and supports new permissions and automation workflows

It equips Teams owners with granular permissions to access team's data, supports new workflows, and offers the ability to sign in to Zapier with Microsoft 365 credentials. Team owners can easily install Zapier from the Teams store, without waiting for the organization's tenant admin consent. This process is powered by Teams new Resource Specific Consent (RSC) Graph permissions.

The RSC permissions model enables team owners to grant consent for the Zapier application to access and/or modify a team's data as specified by the workflow automation.

It provides the ability to Create and share automations in a custom tab in Teams and set up a variety of new workflows, including the ability to automatically send messages in Teams.

"Businesses use dozens of apps and software to get work done. These tools don't often work well together, creating a productivity nightmare," said Cody Jones, Head of Partnerships at Zapier.

"With a deeper Zapier integration, users can now integrate Teams with the rest of their tech stack, making them more organized and efficient, and enabling users to focus on high-importance work, leaving the rest to Zapier."

"Companies rely on Teams to get work done—especially with the recent shift to remote work," said Mike Ammerlaan, director, Microsoft 365 Ecosystem at Microsoft Corp.

"By installing Zapier in Teams, users have expanded automation possibilities at their fingertips, allowing them to save time, streamline their workflows, and work more efficiently on Teams."

Zapier is available in Microsoft Team's App Directory.

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