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AUGUST-SEPTEMBER 2021

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What Is Process Mining (and Why Isn't It Enough)?

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Tackling dark data on shared drives

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When Email needs to be Forever

Government Responds to Tune Review

Australian federal government records managers can rest easy in their jobs for now, with the government rejecting a proposal to centralise the public service's record-keeping at the National Archives of Australia (NAA). It announced the decision in a response to the Tune Review, a major review of the Agency.

The Government also agreed to reform the Archives Act 1983 in consultation with the National Archives and relevant departments and agencies

The Tune Review proposed an information management model referred to as the Government Information Management Model (GIMM), where records management across government would be centralised into the National Archives. 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 would transfer their employment to the NAA.

The Government has responded that it "considers that whilst the goals are sound, the GIMM model proposed would require substantial work and resource transfers across government, that could take a significant period of time and many years before benefits could be realised. Furthermore, there is a need to develop the capability and technology of the National Archives in preparation for the enormity of this role.

"Accordingly, while the Government agrees with the way that Mr Tune has articulated the risks and the outcomes to be achieved, the Government intends to, in the short to medium term, adopt an approach that focusses on better collaboration and training across government using a revitalised committee process."

" .... the structural changes of the GIMM could be explored further as a potential second stage of reform, subject to a final business case, and at a time when the government is confident that the National Archives is well prepared for the scale of the change."

The Government said it has agreed in full or in principle to all recommendations of the Review, after announcing in June $A67.7m in additional funding to undertake urgent preservation of threatened records.

The $A67.7 million in funding for the National Archives will go towards:

• Digitisation and preservation of the National Archives' at-risk collection over an accelerated four-year digitisation program.

• Additional staffing and capability to address backlogs for 'access applications' for Commonwealth records and provide improved Digitisation on Demand services.

• Investment in cybersecurity and further development of the National Archives' Next Generation Digital Archive to facilitate secure and timely transfer of records to the National Archives' custody, their preservation and digital access.

Other responses to the Tune report include a commitment to "integrate the National Archives in important discussions and forums across government departments and agencies which influence decision-making about information and data governance."Currently, agencies that create records are responsible for maintaining and storing them until the agencies makes decisions about which records are of archival significance and are transferred to the National Archives (around 10 percent of all records).

The Tune Review noted that the existing storage framework of records within existing agencies is inefficient, as agencies tend to store most of their records for a long time, even though ultimately most of them can be destroyed. The Review considers this is caused by poor sentencing practices. The Review argued that a centralised off-site storage solution, with an on-demand digitisation service to give agencies access to their records, would be more efficient.

Doing so at a regional location that is less expensive than the capital cities, but still accessible with relative ease, would be likely to represent an appropriate balance between reducing costs and improving ease of access – and such regional options should be explored. Mr Tune said that this should not occur without a final business case being conducted. There is the potential for a Centralised Storage and Preservation Model (CSPM) to, in the long term, deliver savings to the Australian taxpayer, and that potential should be measured in the business case.

The Government responded that it "acknowledges the limitations of current storage practices and notes the potential efficiencies to be gained from streamlined storage solutions, but it is important that mass storage and infrastructure amalgamation is not undertaken without first exploring alternative options.

More information is available HERE.

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CSIRO signs $A1.4M SaaS deal with Citadel

Australia's national science agency, CSIRO, has signed a landmark three-year, $A1.4 million deal with the Citadel Group to deploy records management in the cloud using its Software as a Service (Saas) platform Citadel IX.

The decision by CSIRO to move from an on-premise model came after Citadel also won an earlier deal worth almost $A600, 000 to upgrade more than 25,000 user licenses of Micro Focus Records manager (RM) 8. The agency had been considering upgrading to a hybrid model but issued the cloud tender after becoming convinced that a SaaS solution could be the answer.

As an early adopter of cloud-based solutions and an organisation very familiar with technology, the CSIRO needed to collaborate securely with both internal and external stakeholders in the cloud.

"The real benefit with Citadel IX is CSIRO can outsource the secure data storage and pro-active monitoring of our information management solution as a fully managed service that it will continuously evolve to respond to the increasingly sophisticated cyber threats," said Stewart Hollingdrake, Public Sector Lead at The Citadel Group.

Citadel IX will go live throughout the agency and will enable Australia's top scientists to continue their important research projects with minimal to zero downtime and maximum collaboration, enabling the vast number of research hubs to work together remotely.

With staff and researchers located throughout Australia and around the world, cyber and information security is a mission-critical priority for the agency.

With ransomware attacks on the rise due to COVID-19, cyber intrusions on government systems, critical infrastructure and other information networks are a real and increasing threat to Australia's national interests. The CSIRO recognises that cyber technologies and cybersecurity are essential to an advanced, safe and secure Australia.

In addition to upgrading its record-keeping platform from RM8, CSIRO is undertaking a Proof of Concept (POC) trial of Artificial Intelligence (AI) technology from Canberra's Castlepoint Systems to classify and control information across the agency. Castlepoint Systems recently raised $A3 million in funding led by the CSIRO's deep tech investment fund, Main Sequence Ventures.

"This agreement stands as an outstanding endorsement of the superior quality of the Citadel IX platform," says Mark McConnell, Citadel's Chief Executive Officer and Managing Director.

"While it is true that all of our clients expect (and receive) the highest standards of secure information management, this flagship agreement stands apart because it is with the national agency responsible for setting the government's ICT agenda."

The deal follows The Citadel Group's recent achievements of ISO 27001 certification and assessment at the PROTECTED level by Information Security Registered Assessor Program (IRAP). It successfully addressed 850 processes and procedures to achieve the IRAP Assessment.

Citadel IX is an electronic document and records management system (eDRMS) Software as a Service (SaaS) platform that helps organisations securely manage all records, regulatory data and content in the cloud. Citadel is the Micro Focus global platinum partner for Content Manager and was also awarded the 'Partner of the Year' ANZ in 2020.

https://citadelgroup.com.au/citadel-ix/

Objective share price jumps to record high

Objective Corporation has reported a stellar financial performance in the past financial year, with its share price rising rapidly over 2021 to push the personal wealth of founder, CEO and majority shareholder Tony Walls past the $A1 billion dollar mark.

The company also announced a new cloud-native ECM initiative and a highlight of the first half was the completion of a contract to deliver an Objective Enterprise Content Management as a Service (ECMaaS) solution to 4000 users at the City of Gold Coast in Queensland.

For the 2021 financial year, revenue climbed by 36% to $A95.1 million ($70 million in FY20).

Earnings before interest, tax, depreciation and amortisation (EBITDA) surged by 49% to $A25.6 million ($A17.2 million in FY20). In addition, Net Profit After Tax (NPAT) moved 45% higher to $A16 million. Objective stated that this was driven by strong organic growth and earnings accretive corporate development.

Tony Walls, Objective CEO, commented, "We are really pleased with our performance in FY2021 - delivering outstanding outcomes for our customers, and protecting our employees and their families while facing an uncertain operating environment. Our financial results in FY2021 reflects the continued delivery of our strategic plan, with strong growth in recurring revenue and earnings underpinning our highest ever investment in innovation.

"In its first year in the Objective family, our Regtech business made a solid contribution to our overall results. The market opportunity for Regworks is developing rapidly and was demonstrated by the number of new customer wins during the year; three of which were the largest in Regworks' history. These results illustrate the opportunity that arises from combining businesses with deep domain expertise with Objective's long history of delivering high quality outcomes for over 1,000 public sector organisations.

"In FY2022 we expect the momentum of our business to drive a continued material lift in revenue and profitability."

The company invested $A23M in Research & Development (R&D) in FY21, representing 24% of revenue.

New product launches on the horizon include Objective Build, Objective Nexus (cloud native ECM), Objective ECM 1 11 and Objective RegWorks iQ.

The company has also confirmed it is actively seeking acquisitions that offer additional product or market reach capabilities. Objective declared a healthy cash balance of $A48M at the end of FY21. This includes the $A18M Itree acquisition, and the $A6.6M in dividend payments during September 2020.

"A highlight of the first half was the successful go-live of the final phase of a significant project at the City of Gold Coast," said Walls.

The $A38 million contract was for a solution to help the city government manage records, automate business processes, and collaborate on projects.

"Primarily delivered remotely by an Objective team from around the globe, 4000 users council-wide are leveraging numerous Objective products through our unified user experience framework, Objective IQ. Delivery of this complex and mission critical solution under trying circumstances demonstrates the calibre of our people, the quality of our ECMaaS solution and the infrastructure we have in place to support our customers."

Victoria develops a $A35.2M Digital Twin

Victoria has announced it will spend $A35.2 million to develop Digital Twin Victoria - a data-based digital replica of the state. Minister for Planning Richard Wynne said the project will transform planning and unlock efficiencies from the start to finish of infrastructure projects, helping to drive the state's economic recovery.

Digital twins bring data and information together to create digital representations of the real world, whether that be bricks and mortar, utilities infrastructure, farmland or cities. Planners, engineers and builders will be able to use Digital Twin Victoria to model different project scenarios, test the feasibility of proposals, troubleshoot potential issues, and share complex information across sectors and workplaces more easily.

The funding announcement follows the appointment of CSIRO, Australia's national science agency, as the Government's partner to develop the online platform which will host Victoria's digital twin.

Digital Twin Victoria builds on a successful pilot project that created a digital twin for Australia's largest urban renewal project, Fishermans Bend. The platform is expected to be widely accessible by late 2021.

"Once this platform is established, real-time data can be collected at an astonishing rate and absorbed into the Digital Twin to support informed planning decisions and share important information with communities," said Wynne

"With the convergence of big data and advanced technology, Digital Twin Victoria will enable us to do in minutes and days things that used to take weeks, months and even years.

Chemist Warehouse goes digital with Slyp

NAB has announced that one of its largest transaction customers, Chemist Warehouse will be offering its customers the option of itemised, digital receipts, using Slyp technology.

This function is now live across more than 460 stores across Australia with itemised smart receipts instead being delivered directly to customers via the NAB mobile banking app.

More than 120,000 NAB customers have already opted in to receive digital receipts ensuring the bank and Slyp are on track to make digital receipts used by half of all Australian by the middle of next year.

Andrew Irvine, Group Executive for NAB's Business and Private Bank said, "The explosion of new technology is making many things extinct and traditional paper receipts are no exception.

"Paper receipts are often a pain for both businesses and their customers. Getting digital receipts within the NAB app just makes more sense and will make life a lot easier for our customers. That's what any new tech should be about.

"This is an exciting evolution in payments across Australia and we're delighted to be driving the change in partnership with Slyp."

Jack Gance Chairman and Co-Founder of Chemist Warehouse Group said "As Australia's leading pharmacy retailer we strive to provide our customers with the latest in technological innovation to enhance their in-store experience and we're proud to be setting the standard when it comes to digitisation within the industry.

"We're delighted to have launched Slyp Smart Receipts to improve our environmental footprint and simplify the checkout process for both our customers and our retailers.

"Intuitive and easily accessible, smart receipts are the next, logical step forward in the transformation of the retail experience and move towards a more sustainable in-store approach."

Paul Weingarth, Co-Founder and CEO of Slyp said, "We're on a mission to eradicate paper receipts from the retail sector and make sure that by this time next year, one in two Australians have access to the smart receipt experience.

"The retail sector has been calling for a smart alternative for years and the uptake we've seen in recent months tells us that both merchants and their customers firmly agree.

"For Chemist Warehouse customers, the delivery of smart receipts via SMS or through their bank app will provide an environmentally friendly, digital record of their purchase.

"With the backing of NAB, further support and integration with other major banks, and by partnering with leading retailers like Chemist Warehouse, we're on a path to transform the Australian retail sector, streamline the payments process and bring retailers closer to their customers while saving our environment from unnecessary destruction".

Slyp Smart Receipts are currently available in the receipt section of the NAB mobile app for purchases made in select retailers and hospitality venues across Australia.

For more information about the digital receipt solution visit https://www.nab.com.au/personal/online-banking/mobile-banking-app/digital-receipts.

NAA Checkup Plus survey provides eGovernment reality check

Despite more than 10 years of concerted effort to encourage a digital transformation of Australia's federal government agencies, only two thirds "always or almost always" work digitally by default i.e. create, store and manage information digitally. This is one of a number of issues of concern contained in the latest Checkup Plus survey by the National Archives of Australia, which shows government paper archives continue to grow.

Like the Tokyo Olympics, the annual survey was delayed from 2020 until 2021 by the COVID crisis. A total of 169 agencies completed the survey which found that agencies continue to hold a higher proportion of Retain as National Archives (RNA) documents in physical records (24%) than in digital records (4%).

One in four agencies actually reported an increase in their volume of physical records in the past 12 months, while only 20% reported a decrease.

The 169 agencies surveyed hold over 2 million shelf metres of physical records, with the NAA set to inherit over half a million of these, although the proportion of records with unknown disposal status has grown in most areas. Only 63.2% of physical records have been sentenced.

Nearly two thirds of the agencies who took part in the survey said manual processes are preventing agency's progress toward digital information management.

The report notes the Digital Continuity 2020 Policy largely failed to meet its objectives, as the following data makes clear:

■51% of all business systems meet functional requirements for information management

■50% of agencies' business interactions, decisions and authorisations are recorded digitally.

■40% rarely/never or sometimes undertake regular, systemic risk management activities

■35% never keep information and data in uncontrolled environments.

■27% store unstructured and semi structured information in the agency's approved information management systems.

■68% rarely/never or sometimes use analytics to identify how information is being used and how long it needs to be kept for.

Just over half of all agencies (51%) have a formal governance mechanism for ensuring information management requirements are considered in decision making.

Just over a quarter insist on applying preservation strategies, procedures and activities to ensure information can be accessed, used and understood for as long as it is required. While the number that responded to 'Always Ensure that information and data movements are traceable and transparent, and metadata accompanies data throughout its life?' was lower at 20%.

61% consider a lack of suitably qualified and experienced information management staff is preventing progress toward digital information management.

The majority of agencies felt that COVID 19 did not have an impact on their information management practices.

Almost one third of agencies reported that there were certain information management activities that could not be undertaken due to COVID 19. These agencies commonly highlighted work at home requirements preventing them from accessing sites where physical records could be transported or disposed of.

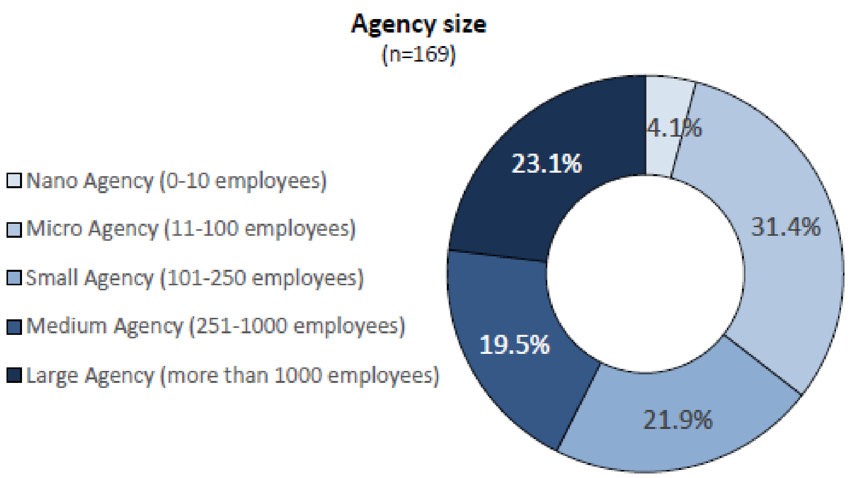
Some responses included:

■Sentencing capability was reduced due to staff working from home.

■Remote working caused secure communication issues, agency wide roll out of Microsoft Teams was required.

■Sentencing and subsequent transfer to storage of physical records was delayed.

Around two thirds of agencies outsource the delivery of information management services with the use of a commercial provider being the most common option.



Agency size distribution for Check Up Plus 2021 Survey.

The majority of agencies (85%) utilised cloud-based storage or services. Almost half of agencies recorded at least some increase in usage of cloud storage as result of COVID-19, this was most common among larger agencies.

Among agencies that use cloud-based storage or services, the most common types of information or systems stored in the cloud include: human resources (66%), financial systems (62%), and administrative (59%). Could EDRMS uptake was lower at 28%.

View the full Checkup Plus Report HERE.

NAA finalising new digitisation panel

With the government opening up the purse strings to provide additional funding for preservation of at-risk records at the National Archives of Australia (NAA), contenders for the work will be sweating on their inclusion on a new national panel of digitisation service providers. Applications closed this month for inclusion on a new panel of Outsourcing Digitisation Service Providers for Photographic Materials, Aerial Film and Microforms. The panel will be used by the NAA for its four-year program and is also open to other Commonwealth Government Agencies.

It will commence on 1st December 2021 and run for five years. Similar panels for digitisation of archival records consisting of paper and printed materials and audiovisual records have already been announced.

The at-risk records at the NAA include over 200,000 items held on nitrate photographic material. Nitrate film was the first successful plastic film base, and was used widely from its introduction in 1889 until the early 1950s for motion picture and still film negatives. It has widely varying stability and is highly flammable.

The estimated of volume of photographic materials, aerial film and microforms held by the National Archives are:

• Photographic materials – 4.9 million items including b&w and colour negatives, prints and glass plates

• Aerial film – Over 50,000 items including film rolls, negative, prints and glass plates

• Microforms - Over 50,000 items including microfilm, microfiche and aperture cards

One of the interested tenderers for the Photographic Materials, Aerial Film and Microforms panel asked if it was possible to send all the NAA material outside of Australia to process the work and do offshore work.

The NAA responded that this would require a written permit or certificate from the Minister under the *Movable Cultural Heritage Act 1986*.

OCR Labs first private digital ID provider

OCR Labs has been announced as the first entirely private Australian-based identity provider offering digital identity services to the private sector.

OCR Labs has been accredited through the Trusted Digital Identity Framework (TDIF), which will mean customers who are using OCR Labs' identity service across the private sector, in areas such as banking, finance and telecommunication, can trust that their identity information can be verified, and is protected. Now they are accredited, OCR Labs will need to continually demonstrate they meet TDIF obligations by undergoing annual assessments.

OCR Labs provides a fully-automated remote identity verification and fraud detection service. It will save consumers time, given they no longer need to visit branches or produce multiple forms of ID to complete an interaction with their bank, such as opening an account or making an application.

Minister for Employment, Workforce, Skills, Small and Family Business, Stuart Robert said privacy and security measures are critical to expanding the Australian Government Digital Identity System.

'We want Australians to have confidence that their information is private and secure, regardless of who holds it. It has become increasingly important in this digital age to be able to establish trust, particularly online,' Minister Robert said.

'Digital Identity underpins the Government's Digital Economy Strategy that will allow Australian businesses like OCR Labs, and in particular small business, to capitalise on the opportunities that digital technologies are creating, enabling them to grow and create jobs as part of Australia's economic recovery.'

More information about the TDIF is available at www.digitalidentity.gov.au.

iCognition goes Platinum

Information Management and Governance (IMG) specialist, iCognition, has been awarded Micro Focus Platinum Partner status.

"We thank Micro Focus for awarding us this Micro Focus Platinum membership, which is not only acknowledgement of our premium level of Micro Focus IMG product sales and service but recognises 18 years of partnership", said Joe Mammoliti, iCognition CEO.

"iCognition is the longest serving reseller of the TRIM/Records Manager/Content Manager product globally, being the only enduring company that had a partnership with the Canberra-based originators of the product, TOWER Software."

Platinum membership was awarded based on iCognition's strong results in transitioning clients to the ISO27001 certified Content Manager-based cloud service, EDRMSaaS.Cloud, where iCognition has a broad portfolio of clients across the government (federal, state/territory and local), education, financial, justice and not-for-profit sectors.

One client, Perpetual Limited, will be speaking at the upcoming Micro Focus Information Management & Governance (IM&G) Forum 2021 about Perpetual's journey in transitioning its records management to iCognition's EDRMSaaS, and the benefits it has achieved.

"We are extremely proud that our team has been justly awarded Platinum partnership," said Mr Mammoliti.

"Coming off the back of our ISO27001 Information Security Management certification, it recognises our high-quality service, support and solutions based upon Micro Focus IMG products, and is further evidence of our trusted advisor status, and the qualifications, experience and professionalism of our staff.

"We have worked hard to ensure that our cloud hosted Content Manager-based IMG solution is world-class and supported by the best on-boarding and support services to ensure our clients achieve and maintain the transformational outcomes they are seeking."

iCognition's long-term partnership success was celebrated by Peter Fuller, Managing Director Micro Focus, Australia & New Zealand, who said "Congratulations to iCognition for being recognised into the premium tier as a Micro Focus Platinum Partner. Our partners are integral to Micro Focus' continued success, with iCognition ensuring and delivering the highest levels of product knowledge, project implementation and exceptional customer satisfaction.."

https://www.icognition.com.au/

Law Firm Arnold Bloch Leibler Selects iManage

Arnold Bloch Leibler (ABL) – an independent Australian law firm renowned for advising clients on high-stakes transactions and disputes – has chosen **iManage Closing Folders** to simplify its legal transaction processes, becoming the first Closing Folders customer in the APAC region.

The adoption of Closing Folders coincides with the firm's selection of iManage for document and email management, collaboration, security, and governance that will help more than 150 of the firm's professionals to be productive from anywhere in a safe, secure environment.

iManage Closing Folders removes the manual, repetitive tasks from legal transaction management so that customers can focus on delivering more value to their clients. Through intelligent automation and collaboration tools, Closing Folders helps firms run deals with unparalleled efficiency, accuracy, and control.

ABL's Banking & Finance team saw a particular opportunity for Closing Folders to streamline ordinarily labour-intensive processes like the creation of closing "bibles" and the gathering of signatures. Historically, the firm had relied on a laborious workflow that centred around emailing PDF documents back and forth to clients for signing.

Closing Folders greatly simplifies that process, saving ABL's professionals valuable time and allowing them to provide more responsive service to customers. Additionally, native integration with iManage enables a single source of the truth for transaction documents from creation through closing.

"Choosing to standardise on the iManage platform in the cloud not just for transaction management, but for many aspects of our knowledge work provides our firm with a strong technological foundation and a competitive edge, which is one of the reasons why we're so excited to be first among our regional peers to deploy Closing Folders," said Nicole Munro, Director of Business Transformation at ABL. "It just makes sense to have one fully integrated ecosystem for our professionals to leverage."

Modernising with a Platform Approach

In addition to Closing Folders, ABL will also leverage the iManage Cloud to deploy iManage Work for intelligent document and email management; iManage Share for secure and easy collaboration; and iManage Threat Manager for securing access to information barrier matters. iManage provides an end-to-end platform for knowledge work that handles content and communication management as well as transaction management.

"After a thorough review of market offerings, in which we carefully evaluated platforms against multiple criteria, iManage emerged as the clear winner," continued Munro. "It is a very modern platform in look and feel – as well as functionality – that provides an ideal way to modernise the infrastructure that supports the work our professionals do every day on behalf of our clients."

ABL is working with global iManage partner Morae on its iManage deployment, which will start with a rollout of Closing Folders followed by a rollout of the extended iManage platform. The firm expects the first phase of the deployment to be complete by the end of Q3.

"As just the first chapter in their iManage journey, Closing Folders will enable ABL to reduce time spent on administrative tasks and spend more time on delivering high-value legal counsel to clients," said Sahil Zaman, Head of Business for iManage Closing Folders. "From there, they will be able to take advantage of all that iManage's comprehensive knowledge work platform has to offer, enabling them to work smarter, more securely, and more productively, and to drive better business outcomes."

Micro Focus considered a "Challenger" for AI/ML

Analyst firm Omdia has highlighted the inbuilt AI and ML capabilities of Micro Focus' Information Management and Governance solutions in naming the firm as a 'Challenger' in its latest report, *"Selecting a Content Services Platform Solution"*. Click HERE for a copy of the Report.

The report evaluated solutions across a series of features and functionality assessments developed by Omdia analysts, and found that Micro Focus' Content Manager, IDOL, and Unified Endpoint Management solutions, respectively, excelled in governance and security.

According to Omdia, the report serves as a guide to help inform the selection process as customers of medium to large enterprises (typically in the financial services, technology, media and telecoms, as well as government sectors) consider content management deployment options.

Overall, the report found that Micro Focus' "strongest areas are content analysis, document management and collaboration, and search," and that "[Micro Focus'] emphasis on governance and security make it an ideal solution for enterprises in regulated industries."

"The recognition by Omdia is an important validation of our hard work and dedication to meeting our customers' increasingly challenging needs," said Rick Carlson, VP, Product Management at Micro Focus.

"We remain diligent in driving improvements and enhancements that benefit our customer experience, with our recent Citadel announcement as well as product roadmap and feature enhancements we expect to continue to move upward and to the right in future Omdia reports."

Omdia highlighted the following Micro Focus strengths across its end-to-end information management offerings:

The inclusion of IDOL provides a differentiator for Micro Focus in terms of AI and ML features, as its capabilities are way beyond those of many of its competitors.

Because its content management and collaboration capabilities are part of a larger information management and governance product group, Micro Focus offers a number of capabilities that help provide the additional security measures required to support enterprises as they manage large numbers of home workers during the COVID-19 pandemic.

Micro Focus provides extensive analytics capabilities, which are embedded with IDOL to provide valuable insights that are applied throughout the product set.

Hornsby Shire Council completes cloud transition to Azure

Hornsby Shire Council recently completed an impressive modernisation project involving the transition of a range of on premise applications into Microsoft Azure. While this cloud transition delivers immediate efficiencies and benefits, it also sets the Council up for accelerated innovation in the future.

The Sydney LGA has a diverse population of around 150,000 people, more than one in three of whom was born overseas. More than two thirds of the Shire is made up of National Park, but it also has busy high-rise corridors and suburbs spanning the area.

When Sharon Bowman, Manager of Technology and Transformation for Hornsby Shire Council first canvassed the idea, she was told that it would be difficult to achieve – not least because the undertaking was scheduled in the midst of a global pandemic.

Turned out those concerns were unfounded; working with solution provider Data Addiction and supported by Microsoft Fast Track, the Council has largely completed the transition and is now reaping the first round of benefits from being in the cloud.

Reduced complexity

When Bowman took on her role in 2020, the immediate challenge was to assess, then fix some of the technology challenges that people were facing. Except for a couple of SaaS applications – including Microsoft 365 – most Council systems were on premise and proving somewhat unreliable.

"One of our strategies moving forward is to reduce complexity and part of reducing complexity is to try and reduce the number of different moving pieces," says Bowman. As an existing user of Microsoft 365, and mid-way through the deployment of Dynamics 365 Customer Insights, which was being supported by Data Addiction, it made sense to consider Microsoft Azure as the platform to underpin the transformation to the cloud and further reduce the complexity.

According to Bowman; "The migration to Azure piece was incredibly quick and we had some fairly tight timelines which we had set ourselves because we did want to decommission our on premise infrastructure – we had some end-of-life issues.

"The cloud transition piece was probably about four months in total. Everybody in my team was saying that they didn't think that we would do it.

"The Data Addiction team just absolutely powered through, kept everybody on track. It was really, really well project managed.

"After the first couple of weeks we realised that everything was running really smoothly and we had so many other parallel projects going that I basically just said to everybody, 'look, just keep me informed and let me know if anything needs to be escalated'.

"Then all I did was looked at the weekly reports and everything was green and I didn't really need to pay very much attention to what was going on with that project at all," she says.

Sharon Bowman, Manager of Technology and Transformation, Hornsby Shire Council

Hornsby's initial cloud transition is just that – a lift and shift to the cloud, which then sets the Council up for further modernisation planned down the track.

Bowman notes; "It went incredibly smoothly and has just been really brilliant, on time, on budget." It has also delivered operational benefits to Hornsby Shire Council's IT team through reduced complexity and 'single pane of glass' for operations. The team no longer has to manage ongoing maintenance of the 92 virtual machines using multiple on-prem systems; instead the rationalised set of servers can be managed easily using tools in the Azure cloud infrastructure provided by Microsoft.

This simplification and reduction in overheads has been one of the first benefits, with more anticipated as innovation gathers pace.

For example, Hornsby and Data Addiction are working on a proof of concept dubbed 'citizen on a page' that will leverage the Azure cloud to collect and interpret all the information that Council has about a resident in order to understand and then tailor the best services to meet that person's needs.

Bowman explains; "We are working with our customer service team to pilot use of this 'single view of the customer' at the front line, and then also having a look at how we can use it to give better information to our executive team and managers about the customer experience we are delivering."

Instead of having to trawl through multiple systems the solution collates everything and serves up an holistic view of the resident.

It's just one of the concepts on the drawing board being led by Hornsby's team focused on digital and business transformation. A recent audit revealed as many as 500 largely paper-based forms used in Council processes, many of which Bowman believes will be able to be streamlined, digitised and modernised using Microsoft Power Platform, in order to help bring the Council's vision for the future to reality.

Australian organisations slow to adopt machine learning: Report

An Australian survey conducted by technology consultancy DiUS has found there's a strong appetite for Machine Learning (ML) in the Australian market with 82% of organisations interested in ML, but only 21% have an ML project in production.

ML's ability to identify patterns in data promises a transformation in how work gets done and who does it to generate real business impact. From automating simple and repetitive tasks at scale through to delivering insights or experiences that were just not possible before, ML is on the mainstream business agenda.

Despite this, the report finds that organisations struggle to move beyond proof-of-concept or pilot stage. Picking the right problem, data quality and availability, model accuracy and application integration are often big blockers, either delaying or preventing ML project success.

Other key findings in the report include:

■ **ML adoption is going to accelerate.** 86% of respondents see ML as critical or one of several important technologies going forward, and 49% of those who have not yet started plan to do so in the next 12-24 months.

■ **Invest in data.** Data-related challenges are either the top or second most reported challenges once the ML journey is started. The importance of data quality, data engineering and building appropriate data infrastructure and pipelines to enable ML initiatives cannot be overstated.

■ **Australia could be facing a ML skills gap.** Only 69% of organisations with models in production report sufficient ML capability.

■ **Top ML use cases are internally focused... for now.** The top two business areas are operational efficiency (48%) and business decision making (46%). Going forward, respondents plan a shift to both an internal and external focus: operational efficiency (57%) and customer experience (51%).

■ **Organisations can succeed with ML by making it a priority.** 79% of respondents achieving success with ML have a strategy, suggesting that focus and investment drive outcomes.

"A giant fast forward button has been pressed on ML in the market, yet it's hard to point to one application or business area doing disproportionately better than others. Advancements are being made across many fronts with unprecedented speed," said Joe Losinno, Co-founder and Director, DiUS.

"We're seeing an increased confidence from our clients across many industries including mining, health, financial services, manufacturing and retail to invest in ML. However, this has resulted in more requests for assistance in building ML-powered digital products and getting ML models into production with the level of accuracy needed to deliver the desired business value. Success with ML requires a focus on the right problems, taking an experimental approach, and investing continuously from a technology, people and process perspective. It's something that businesses should be figuring out how to do well."

On the positive side, the majority (81%) of those organisations that are in production are reporting successful business outcomes. Some examples include:

■ bolttech built a new kind of customer experience. Using pioneering remote diagnostics technology, bolttech can quickly and easily onboard customers onto device protection plans. Customers simply hold their smartphone in front of a mirror and move through a sequence of tests, powered by next-gen machine learning and computer vision technology. The result is a zero-touch risk mitigation tool for bolttech and a best-in-class experience for customers. Link to case study.

■ **Datarock analyses digital photos to extract new value in mining.** Datarock is a machine learning-powered, cloud-based drill core image analysis platform that provides accurate, fast and consistent high-resolution information about a mineral deposit's geology. Using computer vision and image analysis, Datarock supports more efficient decision making throughout the exploration and mining process, delivering productivity and throughput savings to a mine's bottom line. Link to case study.

The Machine Learning National Pulse report is available for download on the DiUS website. It outlines each stage of the ML journey and provides some key considerations and tips for organisations to consider when pursuing ML projects.

The survey, fielded from December 2020 through February 2021, helped identify the key challenges and priorities for ML projects. The 205 respondents were predominantly senior executives and technology practitioners across 18 industries. Notably, 70% of respondents were directly involved in their organisation's ML initiatives.

What Is Process Mining (and Why Isn't It Enough)?

By Richard Rabin, ABBYY

Businesses live by their processes—the prescribed sets of actions their employees take to get things done. When processes run well, the business runs well. When processes run poorly, the business risks a host of hazards, from loss of revenue to customer dissatisfaction to compliance violations. Most businesses have a general idea of how their processes should run, but lack insight into the day-to-day details of execution. Without this insight, how can they make improvements that yield real results?

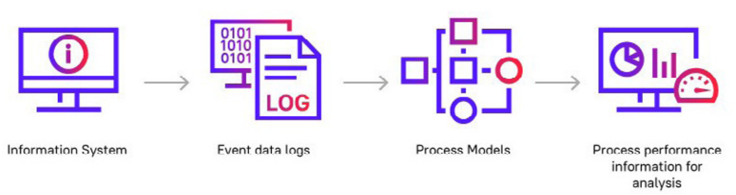
Process mining offers one solution, and for many years it served businesses well. However, in today's increasingly complex environment and amid growing pressure to do more—faster and at lower costs—organizations need more intelligent solutions.

In this article, we'll explore what process mining is, what it can (and can't) do for businesses looking to optimize their processes, and how Process Intelligence offers a more effective approach.

What is process mining

Process mining uses actual data from information systems to create a model that accurately reflects how a process executes.

Applications such as CRM and ERP systems, as well as other systems of record, automatically create event logs that record every action taken. The data in these logs can be collected, or "mined," to create an audit trail of the processes the applications are involved in. This works even when multiple applications are used in a single process. Process mining technology follows these audit trails to build a process model showing the details of the end-to-end process, as well as variations. Business users can analyse these models to find out if the processes are functioning as they should and, if not, investigate the root causes of deviations from the optimal path.



How process mining works.

Before process mining, the only way for businesses to analyse the performance of their processes was through interviews with business users and manual data reviews—a slow, tedious undertaking with a high margin of error. Process mining allows organizations to leverage automation to paint accurate pictures of real-world process performance—faster, easier, and more accurately than manual approaches.

Where process mining falls short

Process mining offers enormous advantages over manual approaches to process analysis, but it has its limitations. For example:

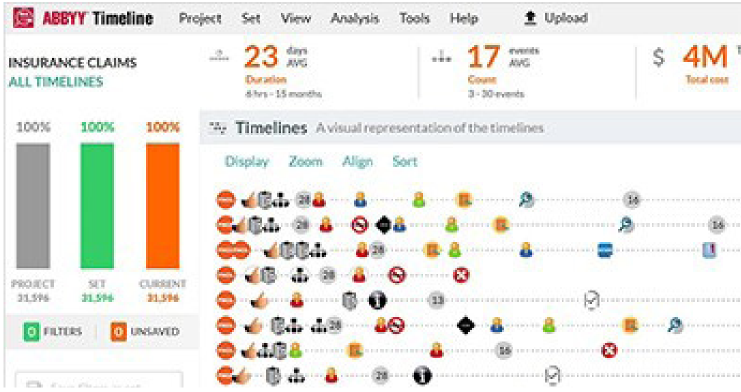
- Traditional process mining identifies process-related issues, but stops short of providing granular answers concerning the root causes of those issues.
- Process mining works well in simpler scenarios, but lacks the sophistication to evaluate complex processes with a large number of valid variations.
- Process mining can only analyse past performance, lacking the ability to monitor processes on an ongoing basis and to alert users to deviations.
- Some traditional process mining tools may be limited in the types of data sources they can connect to, which can limit the value they can provide.

How Process Intelligence bridges the gap

A new generation of process analytics solutions goes beyond traditional process mining. Process Intelligence combines BI-like metrics with a set of process-specific analytics to offer detailed insights into complex processes from end to end. Unlike traditional process mining, Process Intelligence enables businesses to view their processes in real time and analyse patterns that lead to bottlenecks or disruptions.

Here are the top four advantages Process Intelligence offers over traditional process mining:

1. Timeline-based analysis



Process mining uses the schema method of process analysis, which involves converting process data into a flowchart (schema) and then analysing the flow of all iterations through that schema. The shortcoming of this approach is that few business processes fit into a well organized flowchart. By the time all valid variations to a process are considered, the schema often becomes a tangled mess with limited usefulness.

By contrast, Process Intelligence uses a timeline approach (see picture below), which creates an unfiltered, unedited history of every process iteration from beginning to end. These timelines are then analysed so that they can be compared, filtered, searched, aggregated, etc., similarly to how a BI application analyses records in a table. The timeline approach offers complete visibility into the process from end to end, even when some steps are performed using multiple systems. And the numerical analysis approach of Process Intelligence, as compared to the schema-centric approach of process mining, works equally well on all types of processes, as compared to basic process mining that only works well on processes with little variability in terms of the sequence of steps.

2. Continuous improvement

Traditional process mining is focused on looking at historical data. While this approach can offer valuable insights into what worked well and what didn't, it falls short of offering solutions for present and future iterations.

Process Intelligence monitors processes with new data coming in real and near-real time, "watching" every iteration and alerting process owners for deviations that could cause delays or other problems. By enabling continuous improvement, Process Intelligence continues to deliver ROI as businesses capitalize on new opportunities to make processes work faster and smarter.

3. Reduces compliance risks

When businesses run traditional process mining applications, users can review the output to identify present and past deviations that could lead to compliance issues. This approach relies on the expertise of the users reviewing the data.

Process Intelligence enables users to define process rules that align with the organization's compliance requirements and to instruct the system to watch for violations. When one or more of those rules is broken, the system alerts users right away, enabling them to take immediate action to rectify the deviation and to ensure that it will not happen again. Process Intelligence alerting rules can also be defined to call a service when an alert is triggered, to automatically deal with the problem. This capability can mean the difference between discovering an issue just in time, before it affects a business' compliance status, and finding it when it is too late to be fixed and has already caused problems elsewhere in the workflow—or worse, learning about it after a violation has been reported.

4. RPA enhancements

According to Ernst & Young, between 30 and 50 percent of initial robotic process automation (RPA) projects fail due to lack of quantifiable process data. As businesses deploy RPA for more intricate processes in more complex environments, the pressure to deliver positive ROI has increased dramatically, and traditional process mining can offer only limited support in yielding the returns that businesses are seeking.

Fortunately, Process Intelligence can be just as valuable to digital workers (RPA "bots") as it is to human employees. Today's Process Intelligence solutions can include process mining and task mining. As with process mining, task mining is looking for the significant events in a process. Task mining adds the ability to record a user's manual actions on their computer to capture manual process steps to be used along side the steps gleaned from system of record log files. By applying Process Intelligence to manual as well as automated processes, businesses uncover new opportunities to improve RPA results:

- Evaluate manual tasks as to suitability for automation
- Capture the steps in a manual task and use this as a template to create the required bot
- Spot previously hidden redundancies
- Identify optimizations that can free up digital worker cycles, improving digital workforce productivity
- Discover and remedy inefficient hand-offs between digital and human workers
- Deliver quantifiable data on the financial impact of digital workers by process
- Compare human and digital labour in terms of cost, accuracy, efficiency, and duration

Why Process Intelligence is the future of process improvement

For many years, process mining applications served process owners well, saving countless manual hours and helping businesses discover opportunities for improvement. Process Intelligence provides a new approach to process improvement that improves on process mining. Process Intelligence works with all processes, simple and highly variable, manual and automated. Process Intelligence will monitor every process instance as each new step occurs, alerting or even taking automated action whenever a process behaviour of interest is seen.

Process Intelligence supports RPA initiatives by identifying good automation candidates and then monitoring and reporting on the process that bots participate in. Process improvement can now reach a new level in delivering on its promises of greater productivity, reduced risk of costly compliance violations, and the streamlined efficiency that can create happier customers, happier employees, and a greater competitive edge.

Ready to leverage the data you already have for business process improvement? Request a Trial to get started.

2021 SA Records Management Awards

Central Adelaide Local Health Network (CALHN) Manager Health Information Services, Terry Seery, and Manager Medical Records, Tanya Reid, have been announced as the winners of the 2021 Bernadette Bean SA Records Management Service Excellence Award. The award is bestowed in honour of the late Bernadette Bean.

The award judging panel selected Terry and Tanya to recognise and celebrate their exemplary leadership, innovation and teamwork which resulted in the digital transformation of the CALHN Medical Records Department from a paper medical record process to a comprehensive electronic medical record best practice environment.

This included transitioning from physical based records processes with significant off-site historical patient admission file records totalling over 20,000 paper files per month and related significant third-party records storage management costs.

The new digital environment is supported by an innovative centralised scanning model and streamlined workflow processes, complemented by a "working smarter" framework and "doing it right the first time" quality assurance improvement model.

Panel members were impressed to learn how Terry and Tanya led their dedicated colleagues to digitally transform the CALHN Medical Records Department. This included:

- achieving over $4.7 million budget savings on off-site paper medical records management costs, and an extra $200,000 savings on scanning and IT equipment. These benefits were derived from large, complex, innovative, and highly successful electronic records management digitisation and centralised scanning initiatives implemented at SA's flagship new Royal Adelaide Hospital, the Hampstead Rehabilitation Centre and for the CALHN COVID-19 vaccination program. Around 300,000 to 340,000 CALHN documents per month are scanned with the new IT equipment
- how the electronic medical records solutions implemented transformed paper inpatient admission and outpatient attendance health files and medical records to an electronic medical records management environment, with major efficiencies, improved records integrity and other benefits realised for clinicians, administrative staff, the community and the state. These benefits include improved clinical service delivery and patient safety with real-time access to concise, contemporary and high quality electronic patient health information and medical records
- extensive consultation and change management programs and cultural change implemented across multiple clinical, administrative and executive personnel and teams to streamline core workflows, and improve scanning and quality assurance processes. These initiatives positively impacted on clinicians and other users involved in creating, accessing, updating and managing patient health files and medical records
- the education and training/upskilling of existing medical records staff. These efforts led to significantly improved team values, morale, satisfaction and retention of valuable team members; and a sustainable best practice work environment conducive to continuous improvement initiatives and providing support for other teams
- how these best practice digital transformation and centralised scanning models, efficient workflow process improvements and advanced quality assurance initiatives are capable of being scaled and easily adapted to improve service delivery. This includes across diverse services, local health networks and multiple healthcare facilities.

The sheer impact and scale of the efficiency outcomes, savings and other benefits led by Terry and Tanya through their complex digital transformation initiatives were seen as outstanding by the panel.

Supporting "before" and "after" snapshot graphs, examples and other content included in their nomination provided clear evidence of their contributions, and the major savings and other benefits realised for patients, clinicians, administrative staff, the community and the state.

The award governance committee thanks the Records and Information Management Professionals Australasia (RIMPA) for their ongoing endorsement and generous support of this award.

As the winners of the award, Terry and Tanya win the 2021 Bernadette Bean SA award prize package, as well as additional prizes generously contributed by RIMPA.

Terry and Tanya also become a shortlisted RIMPA company nominee for the annual RIMPA Company Outstanding Achievement Awards – Outstanding Group category.

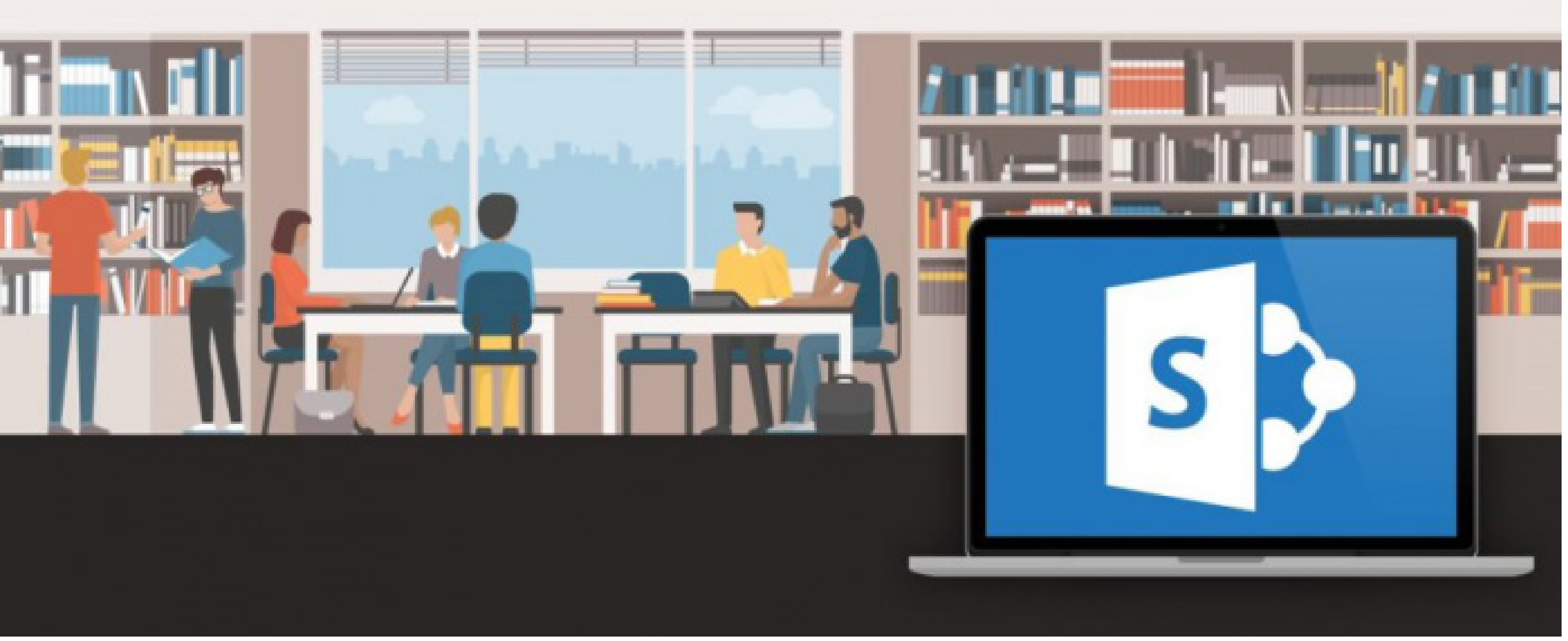
The strong field of nominations received this year led the panel to bestow 2021 service excellence award merit certificates to each of the following recipients:

- Corporate Information Management Team, City of Onkaparinga
- Rita Novia, Senior Document and Records Management Consultant, Primary Industries and Regions SA
- Kerry O'Donohue, Records Management Coordinator, SA Dental, Central Adelaide Local Health Network.

Head over to the award website Current and Past Award Nominations page to learn about each award recipients' outstanding achievements; and why their records and information management leadership, digital transformation, innovation, technology, knowledge sharing/education, dedication and other capabilities are being recognised.

The panel congratulates all 2021 award recipients on their records management service excellence.

This recognition is particularly deserving this year given the last 12 to 18 months have challenged everyone in extraordinary ways to find innovative, agile and resilient practices and digital solutions to help their organisations, teams and individuals pivot to working and connecting remotely, whilst navigating the significant impacts of COVID-19, bushfires and other disruptions.



How SharePoint Governance Integrates With Other Microsoft 365 Apps

By Adrian Valencia, AvePoint

Some of the most effective and utilized collaboration tools are on the cloud to support the continuity of business amidst the challenge of distance. SharePoint is one of the more efficient tools by Microsoft that's ideal for creating sites, acting as a document library, and many more functions that are helpful for communication inside and outside of an organization. It's also integrated with other Microsoft 365 solutions such as Teams, OneDrive, and Yammer, and all of these tools work together to provide a great collaboration experience.

However, the challenge from an admin perspective comes into place because users can just create sites on their own, share documents externally, and add users without proper permissions. It will be a nightmare moving forward if not handled properly. On the other hand, IT and security admins can't always watch over every request and action made by users. That's why it's essential for there to be governance to make sure everything is compliant and secure while still allowing users to submit the requests they need to complete their tasks.

In this article, let's see how governance in SharePoint is beneficial and how it's related to the settings of other Microsoft 365 solutions and services.

What is SharePoint Governance?

Governance is one of the first things anyone should consider before working with SharePoint both on-premises and online. Microsoft simply defines governance as "a set of policies, roles, responsibilities, and processes that control how your organization's business divisions and IT teams work together to achieve its goals. As mentioned above, SharePoint is integrated with other Microsoft 365 apps, so when we talk about governance in SharePoint we're also talking about collaboration governance in Microsoft 365. Settings Interactions Between Microsoft 365 Groups and SharePoint

Microsoft offers many options to enable your governance policies across SharePoint and related apps such as Microsoft Teams, Outlook, Yammer, and Microsoft 365 Groups. There are some settings for Microsoft 365 Groups that overlap with SharePoint in Microsoft 365 settings, specifically related to sharing and Group or Team site creation.

Figure 1. shows how the settings in Groups in Microsoft 365 overlaps with the settings in SharePoint.

So how do these affect each other? Here are some of the scenarios that show the relationship between these settings. Find more in this Microsoft documentation.

■ **Eternal sharing for an organization and site:** This is a SharePoint setting that allows users to share files and folders outside the organization. When the settings in SharePoint don't match with the Groups setting, guests in the groups will be blocked from accessing the site, and external access will only be available on the site and within the Group. To resolve this, both Groups and SharePoint settings should be checked for Group-connected Team sites.

■ **Let users create sites from the SharePoint start page and OneDrive:** This setting determines whether users can create new SharePoint sites. If this setting is disabled, users can still create Group-connected Team sites in the process of creating a Group.

Settings Interactions with Microsoft 365 Groups and Microsoft Teams

While Figure 1. shows the relationship between Microsoft 365 Groups and SharePoint settings,Figure 2. adds Team settings into the mix.

Here are some sample scenarios of the relationship between these three Microsoft services. However, some SharePoint settings don't directly affect a user's experience in Teams.

■ **Allow only users in specific security groups to share externally:** This SharePoint setting allows members of certain security groups to share files and folders externally. This doesn't prevent Team owners from sharing Teams externally, and Team guests can access the associated SharePoint site.

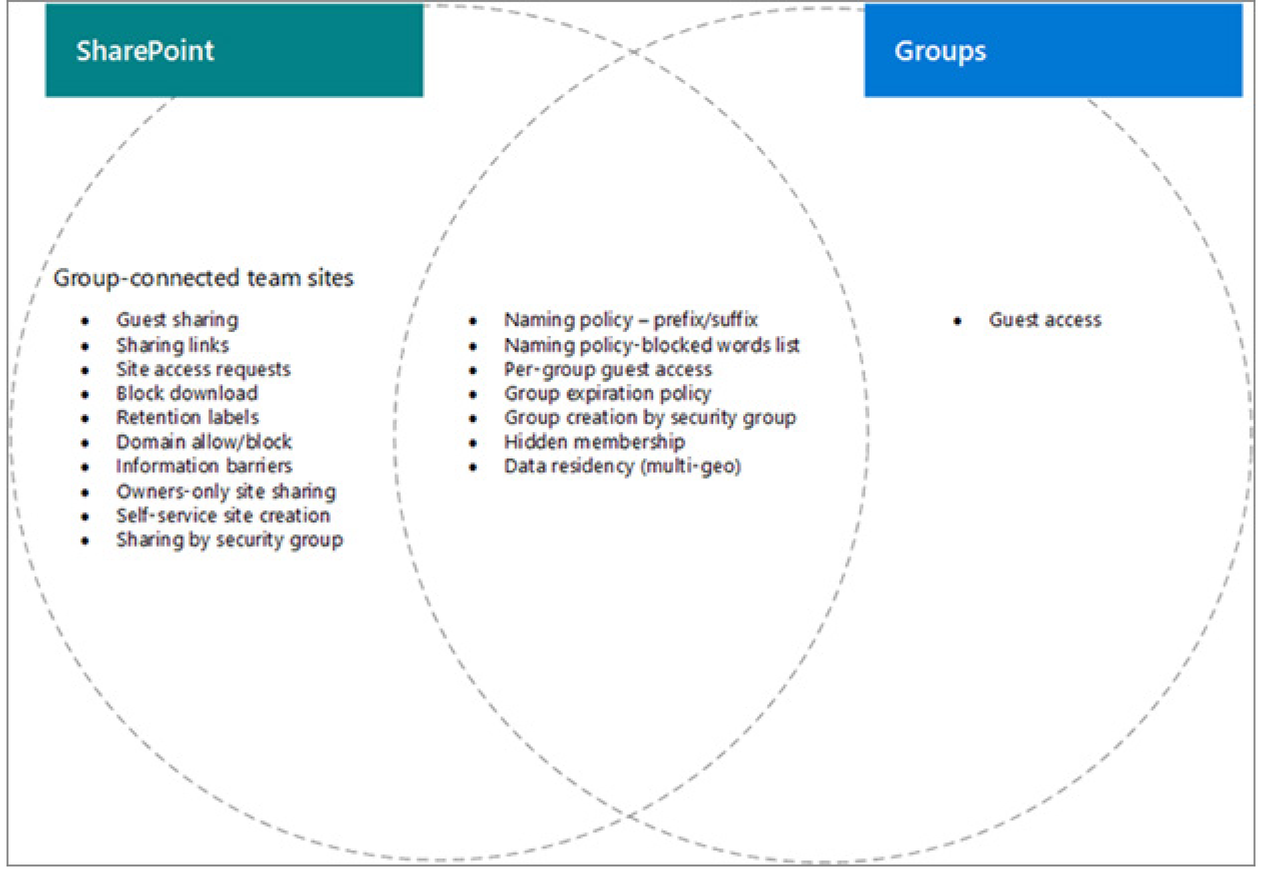


Figure 1.

■ **SharePoint site sharing settings:** This determines who can share the site outside of the Team and is configured by the Team or site owner. This will allow users to be added to a site and not have access to the Team itself or contents inside the Team.

Managing SharePoint alone could be cumbersome - especially for larger organizations with active user bases– and it becomes more complicated when integrated with other Microsoft solutions. However, all these could be managed well if proper collaboration governance is in place.

Third-party solutions can also be adapted to maximize the benefits of governance in SharePoint and other services. Check how can AvePoint's Cloud Governance can ease your governance woes.

Originally published HERE

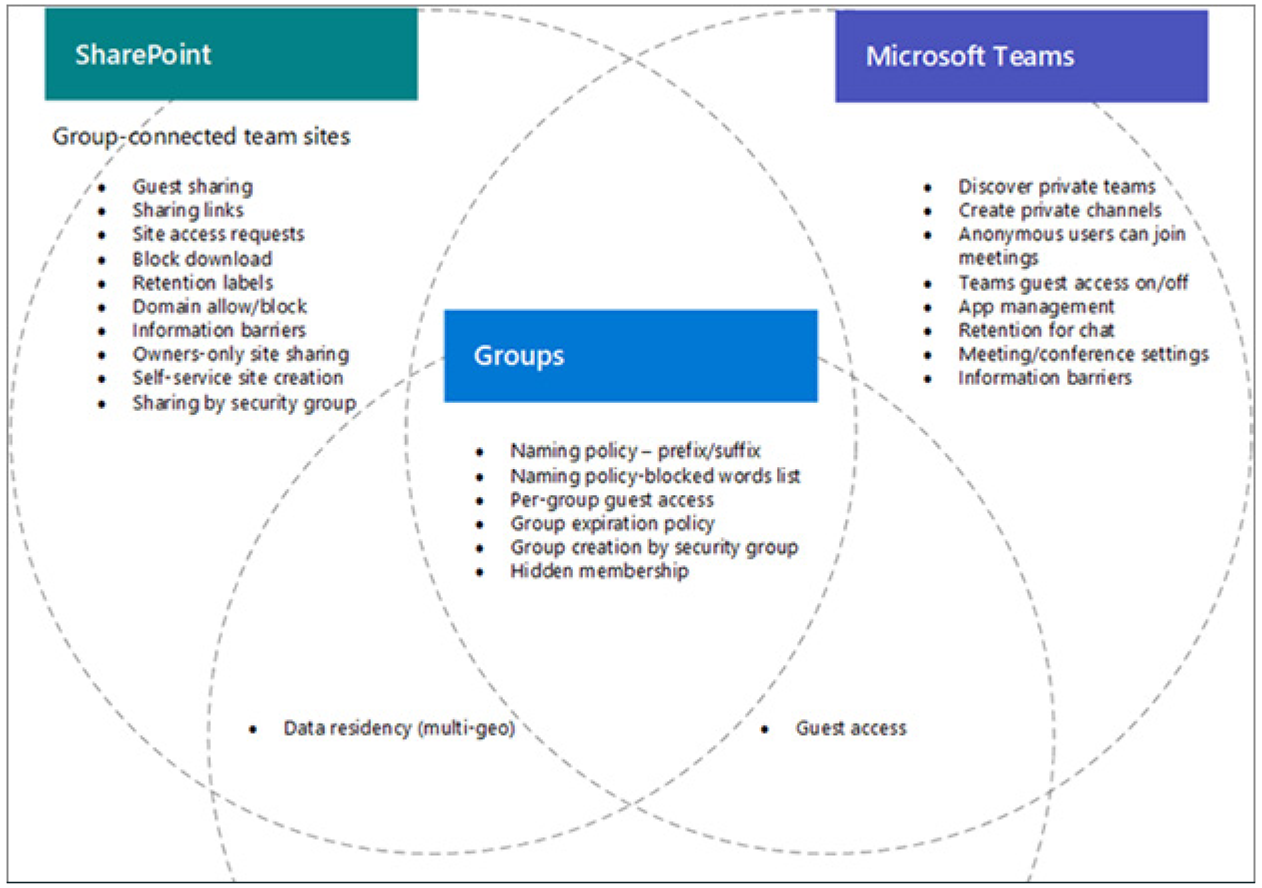


Figure 2.

How hackers can use message mirroring apps to see all your SMS texts — and bypass 2FA security

By Syed Wajid Ali Shah, Jongkil Jay Jeong & Robin Doss

It's now well known that usernames and passwords aren't enough to securely access online services. A recent study highlighted more than 80% of all hacking-related breaches happen due to compromised and weak credentials, with three billion username/password combinations stolen in 2016 alone.

As such, the implementation of two-factor authentication (2FA) has become a necessity. Generally, 2FA aims to provide an additional layer of security to the relatively vulnerable username/password system. It works too. Figures suggest users who enabled 2FA ended up blocking about 99.9% of automated attacks. But as with any good cybersecurity solution, attackers can quickly come up with ways to circumvent it. They can bypass 2FA through the one-time codes sent as an SMS to a user's smartphone. Yet many critical online services in Australia still use SMS-based one-time codes, including myGov and the Big 4 banks: ANZ, Commonwealth Bank, NAB and Westpac.

So what's the problem with SMS?

Major vendors such as Microsoft have urged users to abandon 2FA solutions that leverage SMS and voice calls. This is because SMS is renowned for having infamously poor security, leaving it open to a host of different attacks. For example, SIM swapping has been demonstrated as a way to circumvent 2FA. SIM swapping involves an attacker convincing a victims's mobile service provider they themselves are the victim, and then requesting the victim's phone number be switched to a device of their choice.

SMS-based one-time codes are also shown to be compromised through readily available tools such as Modlishka by leveraging a technique called reverse proxy. This facilitates communication between the victim and a service being impersonated. So in the case of Modlishka, it will intercept communication between a genuine service and a victim and will track and record the victims's interactions with the service, including any login credentials they may use). In addition to these existing vulnerabilities, our team have found additional vulnerabilities in SMS-based 2FA. One particular attack exploits a feature provided on the Google Play Store to automatically install apps from the web to your android device.

Due to syncing services, if a hacker manages to compromise your Google login credentials on their own device, they can then install a message mirroring app directly onto your smartphone. If an attacker has access to your credentials and manages to log into your Google Play account on a laptop (although you will receive a prompt), they can then install any app they'd like automatically onto your smartphone.

The attack on Android

Our experiments revealed a malicious actor can remotely access a user's SMS-based 2FA with little effort, through the use of a popular app (name and type withheld for security reasons) designed to synchronise user's notifications across different devices. Specifically, attackers can leverage a compromised email/password combination connected to a Google account (such as username@gmail.com) to nefariously install a readily-available message mirroring app on a victim's smartphone via Google Play.

This is a realistic scenario since it's common for users to use the same credentials across a variety of services. Using a password manager is an effective way to make your first line of authentication — your username/password login — more secure. Once the app is installed, the attacker can apply simple social engineering techniques to convince the user to enable the permissions required for the app to function properly.

For example, they may pretend to be calling from a legitimate service provider to persuade the user to enable the permissions. After this they can remotely receive all communications sent to the victim's phone, including one-time codes used for 2FA. Although multiple conditions must be fulfilled for the aforementioned attack to work, it still demonstrates the fragile nature of SMS-based 2FA methods.

More importantly, this attack doesn't need high-end technical capabilities. It simply requires insight into how these specific apps work and how to intelligently use them (along with social engineering) to target a victim. The threat is even more real when the attacker is a trusted individual (e.g., a family member) with access to the victim's smartphone.

What's the alternative?

To remain protected online, you should check whether your initial line of defence is secure. First check your password to see if it's compromised. There are a number of security programs that will let you do this. And make sure you're using a well-crafted password. We also recommend you limit the use of SMS as a 2FA method if you can. You can instead use app-based one-time codes, such as through Google Authenticator.

In this case the code is generated within the Google Authenticator app on your device itself, rather than being sent to you. However, this approach can also be compromised by hackers using some sophisticated malware. A better alternative would be to use dedicated hardware devices such as YubiKey.

The YubiKey, first developed in 2008, is an authentication device designed to support one-time password and 2FA protocols without having to rely on SMS-based 2FA. Shutterstock These are small USB (or near-field communication-enabled) devices that provide a streamlined way to enable 2FA across different services.

Such physical devices need to be plugged into or brought into close proximity of a login device as a part of 2FA, therefore mitigating the risks associated with visible one-time codes, such as codes sent by SMS. It must be stressed an underlying condition to any 2FA alternative is the user themselves must have some level of active participation and responsibility. At the same time, further work must be carried out by service providers, developers and researchers to develop more accessible and secure authentication methods.

Essentially, these methods need to go beyond 2FA and towards a multi-factor authentication environment, where multiple methods of authentication are simultaneously deployed and combined as needed.

Syed Wajid Ali Shah is Research Fellow, Jongkil Jay Jeong is CyberCRC Research Fellow and Robin Doss is Research Director at the Centre for Cyber Security Research and Innovation, Deakin University. Originally published at The Conversation.

Governance Fix or Workaround:
Which Way to Select?

By Cassandra Bisset

We need heroes to advocate for change in how we address record-keeping and governance, or we risk the workaround culture halting our transformation plans.

In the early 2000's, a programme commenced to address business risk after evidence relating to an alleged offender was lost. The Executive Leadership team swore they would never allow a situation like this to occur again. The whole organisation was deeply impacted – devastated. Devastated by failing to protect survivors and their families, failing to prosecute, and failing the public.

This disaster compelled the organisation to act. I still think about it today, along with a dozen other remediation projects I've been involved with since, all relating to significant failings around business process, information protection and systems to support staff.

Process indeed is a complex area – we do so many things because 'that's how we do things here'. As new people join the organisation, they may be trained by a colleague, or the work procedures may be documented…or not…and over 6-12 months, people learn how to get things done. More and more, I observe significant process workarounds in place - workarounds that are not visible at the executive layer, though eventually become evident after an incident.

Business Complexity And The Impact Of Workarounds

The impact of workarounds is becoming more significant every year. We have seen annual trends to reduce headcount, staff re-deployment, secondment and significant restructure activity through machinery of government transformation, as well as a rapid pace of acquisition and divestment in private sector.

The regulator spotlight points to the disconnect between how we operate, what we think is being done and what our obligations are – particularly evident in the volume of Royal Commissions in Australia over the last couple of years enquiring in to:

- National Natural Disaster Arrangements
- Violence, Abuse, Neglect and Exploitation of People with Disability

> Building A Data Led Culture Is A Significant Change. It Requires Strategies That Scale And Are Resilient, And A Leadership Team That Understand Investing For The Future Is A Strategic Imperative.

- Aged Care Quality and Safety
- Misconduct in the Banking, Superannuation and Financial Services Industry
- Institutional Responses to Child Sexual Abuse
- The Detention and Protection of Children in the Northern Territory
- Trade Union Governance and Corruption

With business complexity increasing and budgets under pressure, organisational priorities tightly align to strategic initiatives.

It is increasingly difficult to address issues that don't directly appear to be a core strategic priority.

After two decades of seeing what gets attention in the public sector and financial services, I frequently see a lot of the same patterns and missed opportunities to make sustained change for the better.

Citizen centric service delivery and customer experience have become a key focus for most (notwithstanding crisis response right now). And rightly so – it is the 'Customer' we serve. The question of service deserves some deeper reflection, particularly how we support the teams working behind the scenes.

As discussed by Phil Gaetjens, Secretary, Department of the Prime Minister and Cabinet in a recent Work With Purpose podcast on a purpose-driven public service: *'…things are happening instantaneously, with*

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email, iPhones...there's now much more of an expectation from both social views and work views that things happen instantaneously and that's put a lot of pressure on systems and people, and work now is 24x7.'

A look at the numerous recommendations formed during the Independent Review of the Australian Public Service and the reform agenda, particularly how we provide strong foundations to deliver better outcomes, transform for the future, embrace data and digital, strengthen digital governance, and empowering leaders – shows there's a few jobs to be done.

Building a data led culture is a significant change and it requires strategies that scale and are resilient, and a leadership team that understand that investing for the future is a strategic imperative.

This is evident when considering how organisations presently perform records management, privacy, data protection, e-discovery, file analysis and search. Most organisations don't yet do parts of these capabilities, or typically have a different product to handle each problem - often this is reflected by the business sponsor being in a different team and having applied for funding to solve an issue in their area.

The Trouble with Data, Data Everywhere

It is not unusual to find three record-keeping systems (I've seen just over 80 in one organisation), several search tools, and hundreds to thousands of repositories. The short-term tactical path needs to be put aside or we will never have enough capacity to evolve. The operational backbone – sadly deemed the 'back office' has not attracted a lot of attention and is suffering from years of neglect.

Reformation requires reflection on the outcomes or mission we are trying to achieve (design thinking) and a deep understanding of the business activities performed by staff (and user experience), how processes flow across the organisation, systems they touch, which stakeholders are involved and may need to approve change.

It needs strong sponsorship from the top down and support and engagement from the bottom up – nothing new here, but it's necessary. Too often we see symptoms being addressed over and over in different business units, often in different ways, or remaining neglected with manual workarounds. Sometimes the problem may be addressed - rarely the root cause is uncovered.

> Software Has Hit Its Stride; It Is Grown Up And It Should Be Doing More Than Just Giving Us A Compliance Tick.

Staff frustration and fatigue increasingly impact the performance of the organisation. To describe the experience, HBR article Burnout Is About Your Workplace, Not Your People, Jennifer Moss highlights her discussion with Christina Maslach, expert social psychologist: *'...First, ask yourself as a leader, what is making my staff so unhealthy? Why does our work environment lack the conditions for them to flourish?*

How can I make it safe for them to work here every day? We have to dig into the data and ask our people what would make work better for them. More generally, we need to better understand what causes people to feel motivated in our organizations, and what causes them frustration.'

Dealing with Digital Burnout

In a recent engagement with a government organisation, I saw that experience first-hand. A significant increase in information requests, creating countless out of hours effort from staff to perform manual discovery across some 20 repositories, then double checking, curating and authorising content sets to be sent out.

The Minister has no idea of the pain and effort to perform the task, they get their answers as usual, as expected, and get on with the job. The leadership team have no real visibility either, because staff don't realise how bad things are - there is acceptance that this is how things are done and that burnout is part of being a good corporate citizen. The team deeply care about doing the right thing, the strain and exhaustion was evident. I really feel for teams that are under enormous pressure.

For any doubters thinking that burnout is a cop out, the visual analogy shared by Maslach in the same article provides a helpful paradigm: '...picture a canary in a coal mine. They are healthy birds, singing away as they make their way into the cave. But, when they come out full of soot and disease, no longer singing, can you imagine us asking why the canaries made themselves sick? No, because the answer would be obvious: the coal mine is making the birds sick.'.

With a greater focus on data, dashboards, and insights to anticipate issues, pressure on systems is building, particularly following the rapid transition to digital ways of working, enabling staff during the pandemic. The current manual processes are too slow, we miss things and make poor decisions.

As organisations progress with transformation initiatives like robotic process automation and predictive data modelling, accessing the right, curated, unstructured data (documents, emails, chats and the things that don't make it into your core line of business data systems) is essential to supporting transformation activities.

For a controlled process, such as a licence application or claims management, this is a well-trodden ground, as the process entry point is controlled and enables a mandate on the data collected and pre-requisites for the process. Our back office is another story.

We address record-keeping, transparency, know this is a problem, it's the 'death by a thousand cuts' each day, where we: have to retrieve something, like how a

> With A Greater Focus On Data, Dashboards, And Insights To Anticipate Issues, Pressure On Systems Is Building, Particularly Following The Rapid Transition To Digital Ways Of Working During The Pandemic.

decision was made by our predecessors, or need to find all our active contracts in the organisation to see if we have appropriate termination clauses or appropriate force majeure clauses covering COVID, or find out what 'we' said last time that topic came up.

People are busy, they are stretched by the ongoing grind, things go wrong, literally every day, and very few people put information in the right spot or the central records system to find it again tomorrow.

Segway a change, like the amendments to the Privacy Act 1988 in Australia (and GDPR impacting some organisations) – how do we apply these new changes across all our business systems and repositories, how do we see what the impact is with this change and know we are covered.

In a climate of increasing regulation, compliance, and legislation, we expect more and more change every year. How do you plan to implement these changes? A re-think of our previous strategies is due.

Software Must Be An Enabler Of The Needs Of The Organisation And Its People

With professional service firms doing significant research in public sector transformation and compliance - PWC with Government Matters, Deloitte with their Government Trends 2020 report, peak bodies such as AIIM, along with analysts and advisors, notably IBRS's Dr Joseph Sweeney and Gartner, and specialists at Recordkeeping Innovation, having all raised these issue for years, I remain optimistic that leaders are starting to have enough of the right conversations to activate change.

Martin Stewart- Weeks provides valuable points in his recent Reflections on Government and COVID19 blog, particularly how we might see the pandemic as being a big enough disaster to drive sustained progress, particularly collaboration and inter-agency cooperation.

There is renewed concern across government and regulated sectors to address record-keeping, transparency, and governance, following the rapid rollout of systems to support working from home – Microsoft Teams commonly. It is not unrealistic to expect a Royal Commission in the near term, but as Martin postulates, do we need another one to change?

Why is it that change seems to need a lone pioneer on a quest to succeed? A transformative leader, who is amazing at team collaboration, with exceptional intrapersonal skills and a magnet for luck?

This summary from recent Deloitte research '*Government Trends 2020 What are the most transformational trends in government today?* really highlights the transition from a reactive to a preventative culture: *'...governments*

(Continued Over)

(From Previous Page)

will need to be more intuitive, to sense and respond to new technology opportunities, social challenges, and citizens needs as they emerge. And to serve citizens well, governments will need to be more integrated.'

Breaking down silos and seamlessly connecting and streamlining data and process flows are integral to finding new solutions, enhancing security, and creating personalised and engaging citizen experiences. In short, transformation will require uprooting outdated systems and practices and replacing them with new models better suited to the age of artificial intelligence (AI).'

This 'uprooting' comment is one worthy of a little more digging. I passionately advocate that software must be an enabler of the needs of the organisation, without imposing the traditional risk, change impact, expenditure, and delayed time to outcome.

This is a significant factor in why changing the status quo is such a big ask and why leaders don't really want to take it on. No one wants a black mark on their career, and who has the time to spur on hundreds of teammates, keeping them motivated and on course?

Leveraging SaaS capabilities or managed SaaS keeps systems evergreen and moves away from traditional upgrade approaches which we all loath for all the right reasons – they are time consuming, costly, and slow progress.

Smaller organisations get benefits they could not afford in the past and generally speaking, the pace of feature enhancement is excellent, evolving to the emerging needs across customers. Our team has spent years thinking about this challenge, working through strategies to safely transition and change the way information management, record-keeping and governance is done.

It's extremely rewarding to see the Department of Finance advocating change in Federal Government with The Digital Records Transformation Initiative, following years of effort and an acknowledgement that continuing to do the things that got us here will not get us where we need to go. Automation, AI, and ML approaches are needed to manage the enormous data growth ahead of us.

McKinsey insights on antipatterns are helpful here: '... Are you focusing on system replacement rather than improving existing systems in a way that is faster and more cost-effective?' It is not for every situation, however there is merit in considering this hybrid approach. We know how much content and investment has gone into existing record-keeping strategies and ECM systems, so instead of asking government to throw that out, EncompaaS provides a connector framework to continue to add value to those systems and enable organisations to move forward in a hybrid mode, at a pace that makes sense. This model means our attention can go to solving our critical problems first versus data migration and re-designing entire capability sets that have been heavily integrated to other systems.

Most organisations want to continue to get value out of the embedded processes. They want flexibility to re-locate sensitive records to these secure repositories.

With the significant push for staff to be working in SharePoint, Teams, and specialist business systems like ServiceNow and Salesforce, supporting staff to work natively in those systems, without having to remember to perform a record-keeping task is liberating for staff, and a relief for information managers. Everyone wins.

Finally, records staff are supported to perform their role at scale, across the business systems and automate the classification approach with ML techniques.

For me, one of the most wonderful outcomes is to finally have visibility - visibility of our high-risk and high-value records across the enterprise and have a central policy, with supervision from the records team.

Policies help us determine what should happen when we discover and manage our records, particularly high risk/value categories - should they stay in the shared drive and be managed in place, or should they be re-located to a secure repository – we can finally see and make those decisions.

We now have strategies to do the heavy lifting around the complex mess we have created for ourselves over 20+ years, to get us in shape and to support us going forward. We can now work with business teams to define simplified ways of working and providing better access to information - a significant help.

Software has hit its stride; it is grown up and it should be doing more than just giving us a compliance tick. It does the heavy lifting to support appropriate decision making and saves us from having to deploy the old workarounds and stop gaps. It replaces the old integrations that grind IT to a halt. It gives us understanding and prevents risk, ahead of time.

We can safely retire content, particularly duplicate content, which is an epidemic created by the workarounds we wade through every day.

Through partnership with IT, we can target systems to sunset, classify the content, and safely sentence it, meeting our compliance obligations, freeing up cost and reducing the legacy burden on the organisation. With access to curated, enriched data, we help fuel transformation for business leaders and their teams.

To all the amazing people out there taking action and making change for the future, keep on going! For those of you who are curious, start discussions internally and think of the changes you would want to make in your team. It is our calling to enable all the heroes out there to complete their quest. We would love to hear from you and welcome your reflections.

Cassandra Bisset is a Technology Evangelist at EncompaaS and has spent 20 years working predominantly with Government and Banking, specialising in information governance, records management, automation, and machine learning.
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ScaleHub expands to APAC region

ScaleHub, the cloud-based managed-service crowdsourcing solution headquartered in Norderstedt, Germany, has created a new entity to target Southeast Asia, Australia, and New Zealand.

The ScaleHub Executive Management team felt the time was right to officially boost the business's global presence.

Torsten Malchow, ScaleHub's CRO, will lead the sales and marketing strategy for these dynamic markets along with his continued work expanding ScaleHub in both the North American and European markets. The headquarters for the Southeast Asia and Oceania regional subsidiary will be located in Queensland, Australia.

John Stewart, ScaleHub's Australian Business Advisor and BPO market insider, commented on the growth: "Both the Australian and Southeast Asian markets are poised to benefit from ScaleHub's unique crowdsourcing solution. Those benefits include huge cost savings, 99% data accuracy, and SLA guarantees. Plus, the growth of the gig economy and streamlined business processes combine to make ScaleHub's solution the most scalable.

"Data security is another critical topic and ScaleHub has delivered in a brilliant way. For example, data processed in Australia will never leave the country, which is a legal requirement for many government and financial services projects. ScaleHub's focus on the BPO and Shared Service Centre markets for banks and insurance will bring both new technology and great service to the region."

John concluded by commenting on ScaleHub's regional origins, "German engineering still delivers very high-quality services and innovation."

Remarking on the expansion, Torsten touched on the growing global demand for outsourcing solutions. "As we saw with the pandemic, it's essential for every company to have a solid and diverse outsourcing strategy to avoid putting all of their outsourcing eggs in one basket."

Torsten continued, "We're happy to continue our support of prospects, partners, and local customers. There's a reason why ScaleHub was recognized as one of the fastest growing companies in Europe at the beginning of the year by The Financial Times and Statista."

https://www.scalehub.com/

Knosys $A5M Library Software acquisition

ASX listed Knosys has acquired Australian vendor LIBERO, developer of Library Management Software (LMS) used by many public libraries or tertiary educations across Australia, for $A5 million in cash and shares.

Knosys says the acquisition will broaden its SaaS portfolio, which now includes the Knowledge IQ knowledge management platform and GreenOrbit Intelligent Intranet.

LIBERO is headquartered in Brisbane with 17 employees and generates annual revenue of $A2.2 million. It has 116 clients located across 8 countries, predominantly Australia and Germany/EU

The global market for LMS is predicted to reach US$2.4 billion by 2024, at a compound annual growth rate of 4%.

According to a statement from Knosys, "The acquisition of the LIBERO business is in line with Knosys' growth strategy to deliver multiple SaaS offerings under a shared services model. This growth strategy is part of an ongoing growth program to enable Knosys to scale its global operations, acquire new development capabilities and expand sales offices whilst maintaining a cost-effective shared services model."

A specially incorporated Knosys subsidiary (Libero Systems Pty Ltd) will acquire the LIBERO business assets from the Vendors, including all the issued share capital in its German subsidiary, Libero IS GmbH.

Kofax Acquires Printix

Kofax has acquired Printix, a cloud-based SaaS print management software provider.

Printix helps businesses of all sizes eliminate the need to install traditional on-premise print management software - with the related print servers - enabling the benefits of modern and secure print management functionality.

To date, Printix primarily has been marketed through a channel of managed service providers, distributors and cloud marketplaces. Kofax will extend these channels to leverage its large and well established MFD manufacturer and independent dealer partners.

"We are very excited to join Kofax and become a part of their impressive intelligent automation portfolio," says Jesper Christiansen, Printix's Chief Executive Officer.

"This acquisition will allow Kofax to rapidly scale Printix's market access, partner channels and customer base.

"Our existing customers and partners will benefit from Kofax's much larger resources, global reach and broader portfolio of synergistic software and solutions, accelerating their digital workflow transformation journeys."

Litera buys contract analysis company

Litera has announced the acquisition of Kira Systems ("Kira"), a developer of machine learning contract review and analysis software. This follows the recent purchase of Australia's DocsCorp and its suite of software and services for document professionals who use enterprise content management systems.

Since 2019, Litera has seen significant organic growth and completed 12 acquisitions, more than trebling the size of the business. Founded in 2011 and based in Toronto, Canada, Kira offers contract analysis software to help helping lawyers to analyse more documents with greater efficiency and accuracy.

Kira's patented, award-winning machine learning technology, quickly extracts concepts and data points and comes with over 1200 built-in provision models. The company claims to be the dominant player in contract analysis software for law firms, used by a majority of the AmLaw 100 firms, and 18 of the top 25 law firms in the 2020 M&A league tables.

On a typical M&A deal, lawyers are only reviewing a small set of contracts because it traditionally has not been economically feasible to do more.

This selective process inherently increases risk in the deal, and important information can be overlooked. With Kira, lawyers can review more contracts efficiently and accurately to mitigate risks and provide more significant insights into transactions.

www.kirasystems.com

BoM to scan our climate history

Australia's Bureau of Meteorology (BoM) is undertaking a major project to digitise historic technical records dating back to 1860 through to 1956 detailing meteorological observation elements (e.g. temperature, pressure, wind). The Bureau is Australia's national weather, climate and water agency with regional offices located in each State capital and in Darwin.

The Bureau is looking for translation of over 300,000 scanned PDF pages of handwritten, tabulated, historical weather observations, to generate an accessible digital version to be incorporated into the Bureau's database. The BoM says it needs to make the data from these forms accessible as a national data asset.

It expects the process to do this may be either manual (data entry) or automated (e.g. optical character recognition/intelligent character recognition) or a combination of the two.

The call for Expressions of Interest sets out the considerable challenge in digitising these historical records: The records comprise numerous form types ranging in size from Foolscap to approximately A1.

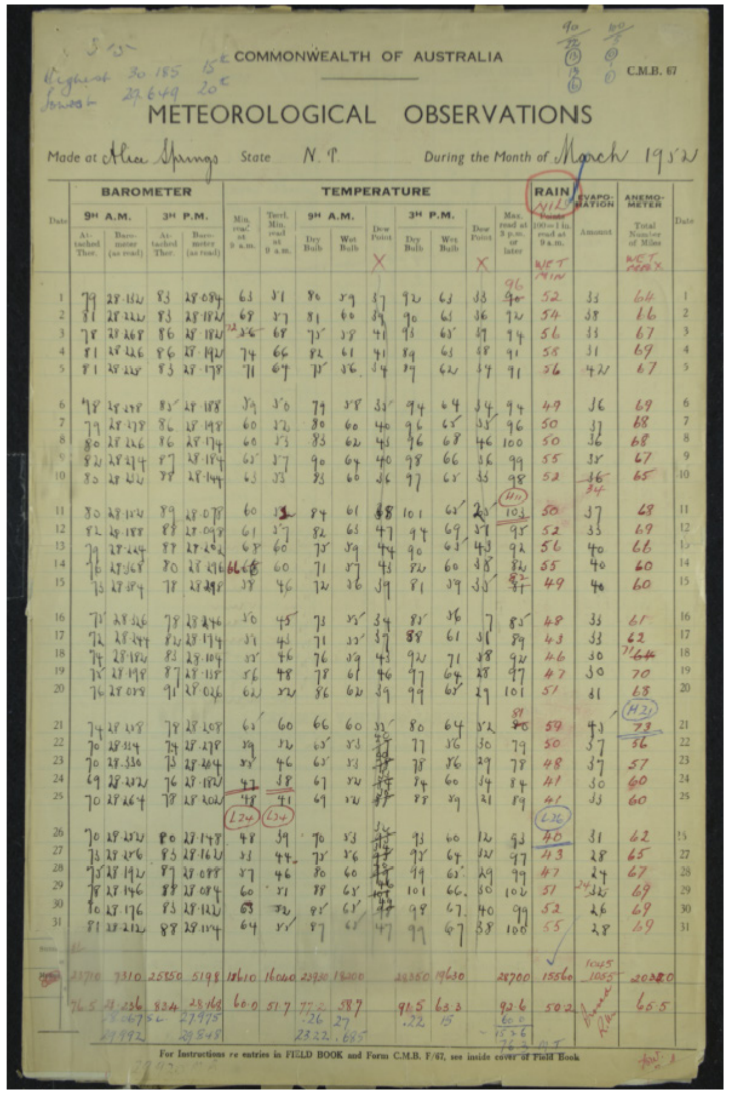
The records are for a number of different stations, which are identified by name on the form and a corresponding 6-digit station number for ingestion into the Bureau's database.

The data is handwritten on pre-printed tabular forms. The writing is generally in ink but some forms may be written in pencil. Printed text on forms may have been amended by hand.

These alterations must be recorded in preference to the original printed text. Some interpretation may be required.

Each form contains a range of meteorological observation elements (e.g. temperature, pressure, wind) for various days and times/time periods.

Some handwritten values may have been corrected, written over, may not be completely contained in the designated column or may have been written in



An example of a historical meteorological record.

a different column altogether (this is common with corrections). The data is generally in imperial units.

The Bureau expects an accuracy rate of 99.8% for the digitisation project. Depending on how the project is rolled out there is the potential that there could be many more pages over later phases.

Kofax delivers for Ron Finemore Transport

Ron Finemore Transport was honoured in the annual Kofax Customer Excellence Awards at Accelerate 2021, Kofax's virtual customer event. Headquartered in Wodonga, Victoria, Ron Finemore Transport operates an extensive logistics network across the Australia's eastern seaboard.

A family-owned business founded in 2004, Ron Finemore Transport's 650+ employees deliver a comprehensive range of transport and logistics solutions to leading enterprises including Aldi, Caltex Australia, Manildra Group of Companies, Nestlé, Simplot Australia and Woolworths.

General Manager of Technology & Innovation, Darren Wood says, "Working like tomorrow, today means keeping up with change and being at the forefront of innovation".

"We are continuously trying to improve and look at a range of technology initiatives across the business to help improve our efficiency."

To augment its logistics services, Ron Finemore Transport aimed to harness realtime position and activity data for all the trucks in its fleet. In the past, providing accurate status updates for each load required the company to manually re-key the position and activity data into its transportation management system - a time-consuming task. Using Kofax RPA, Ron Finemore Transport has automated 91 percent of the process, liberating six full-time equivalents to focus on value-added activities.

"Status Updates were not being applied in realtime and up until we started our relationship with Kofax that job was being performed manually by fingers on keyboards," said Wood.

"So, in 2020, our business processed 980,000 status updates which was a significant increase on the previous year. We believe we've saved anywhere between $A800,000 and $A100,000 in overhead per annum."

What Happens when you get rid of all your Records Managers?

By Rachael Greaves

In 2014, the City of Nedlands introduced SharePoint to replace its TRIM records management system. Like many Councils nationwide, the City has a wide spectrum of responsibilities, from rangers to rates, libraries to the public pool, with a diverse workforce and specialist skill sets to match.

In 2016, WA Local Government Authority's IT manager recommended to the Chief Executive Officer that the Records Management unit be abolished.

This was approved by the Chief Executive Officer in late 2016. Shortly thereafter all positions within the Records Management Section were made redundant.

The rationale and justification for abolishing the Records Management function was that the city's internal paper-based information has been progressively replaced by digital communications, and a SharePoint-only solution could be implemented and supported instead by the IT management team.

Recently, the city commissioned an audit report to check their compliance position. The report found that there was wide inconsistency in the storage, user experience and compliance of records across the Council, along with a lack of governance and management.

> The audit found that the Council was not only in breach of its compliance expectations, but that the outcome for staff was also detrimental.

"Overall, the findings reported... are considered very serious as the City's records are largely unmanaged and lack compliance with State Records Act 2000 ... the City does not have qualified and experienced staff responsible for Records Management and that has been the case for around 4.5 years. Likewise, staff across the organisation are not aware of their record-keeping obligations." - 2021 Audit and Risk Committee.

Records are held in four separate SharePoint environments: intranet, extranet, controlled drives, and the collaboration environment (which is used as an intranet, for forms, as the HR system, and as the CRM).

Council staff training on records management is limited to a part of their induction with some ad hoc on the job training, with no one area responsible for ensuring processes are met, or that proper record management is taking place.

The audit also found that there were still records in the legacy system, TRIM, that couldn't be migrated across. And users had the ability to access and delete even Vital Records.

Further, basic record-keeping processes were not being followed. There were no rules for retention or disposal, resulting in records either being kept too long, or deleted too soon.

Despite the system being "primarily configured to support the City's record-keeping practice.... There is no evidence of Retention and Disposal rules configured in SharePoint".

Does it really matter?

The concept of transitioning to a SharePoint-based information management environment, and away from a traditional EDRMS, is a sound one.

This move has been made by many organisations looking to make records management an integrated part of the information lifecycle, rather than an overhead for staff that interrupts their productivity.

However, making this move without a considered approach for compliance will always, eventually, backfire.

The audit found that the Council was not only in breach of its compliance expectations, but that the outcome for staff was also detrimental.

Governance was simply devolved to each business unit. Employees were made responsible for managing records compliantly, but now without a records team (or records system) to support them.

"SharePoint Search is struggling to present meaningful search results." - Audit and Risk Committee 2021.

The implications of the records management issues went beyond retention and disposal – they resulted in security risks, discovery impacts, increased storage costs, and the undermining of evidential processes.

These types of issues go on to affect social license and trust with stakeholders.

Read the full audit here.

What could have been done differently?

There are two main issues here. Firstly, the wrong technology solution – SharePoint without continuum controls is not compliant against the International Standards, and it cannot be configured to be so without third party solutions.

But the second key issue was the decision to make the records management function redundant. Even in a digital world, where modern collaboration systems make for a very user-centric experience of information management, we must have access to the expertise of records managers.

They are the subject matter experts for not only how long to retain information, but how and when to dispose of it, and why.

They are the trusted advisors for how to structure information architectures so that it content easy to find and reuse, and how to protect it and preserve it properly.

> The implications of the records management issues went beyond retention and disposal - they resulted in security risks, discovery impacts, increased storage costs, and the under-mining of evidential processes.

What will be done now?

The City has agreed to address all of the recommendations from the audits in the next 12 months. And they will start with the people:

"Addressing the people and process recommendations of the... audit findings should precede any review and/or changes in the City's IT systems required to underpin the City's records management function.

"The people and process elements will effectively inform what IT system support is required and to what level." - Audit and Risk Committee 2021

Once the records management function is reassessed, the City will consider "assessment of suitable intelligent automation solutions, that are able to undertake some of the functional processes of records management and alleviate some reliance on staff resources."

The good news is, this capability is now accessible and widely available, and can, when overseen by people with records management knowledge, ensure full compliance without the impacts.

Rachael Greaves is the co-founder and Chief Executive Officer of Castlepoint Systems.

The importance of data masking and testing

Increasingly complex organisational landscapes are putting pressure on business systems to cope with growing amounts of data. As a result, companies that rely on enterprise resource planning (ERP) systems must ensure they have access to reliable and trustworthy solutions, capable of scaling with and supporting a growing volume of data. To guarantee systems are operating as they should, organisations must invest in system testing and data masking to achieve a comprehensive and accurate understanding of the systems' capabilities without compromising security, according to SNP Group.

Brent Paterson, managing director, Australia and New Zealand, SNP Group, said, "The business environment is in flux with new working models, accelerated digital transformation, leaner organisational structures, and mergers and acquisitions creating complexity over the past 18 months. Using data effectively can help organisations manage change more effectively and continue to grow in a competitive marketplace."

One of the ways data can make a difference in organisations is in assessing the quality and performance of ERP systems. Using realistic data is critical to ensure the test results reflect real-world scenarios. However, using real data during the testing process is risky, potentially opening both data and organisations to external threats and exploits.

Using data masking during the testing process is a more secure way of assessing an ERP environment. It minimises the risk of exposing data as it de-identifies or scrambles the information to ensure that sensitive data is anonymised for confidentiality when it is integrated into the testing environment.

Data masking is the process of creating fake-yet-realistic organisational data sets, which helps to protect and secure sensitive data from internal and external misuse, providing a functional and efficient alternative for testing purposes. This is particularly valuable when leveraged for application development and other similar projects, as it lets data appear real and consistent without risking the potential for exposure of sensitive or personally identifiable data sets.

Brent Paterson said, "Data masking is becoming increasingly important as the organisational landscape continues to evolve. Testing processes and environments must keep pace with digital transformations and data masking is a highly leverageable tool that organisations can use to help streamline testing and assessments without compromising security."

Manually masking data can be cumbersome and time-consuming. Additionally, cloning large databases to use in testing environments can be costly. However, automated data masking solutions deliver a more cost-effective method of assessing organisations' systems and processes.

Brent Paterson said, "Preparing data for testing environments can eat up a significant amount of time. Automated solutions help to mitigate this by reducing the amount of time and resources required, without creating security risks. Data masking is essential in today's environments and using more affordable, automated data masking solutions in the testing environment can make this even more valuable and useful to organisations.

"Automating data masking also accelerates testing, shortens the time frames for change processes and development, and leads to faster, more effective business decisions."

https://www.snpgroup.com/en-us/

TDWI Releases New Data Literacy Guide

TDWI, a provider of education and research for analytics and data management, has launched a new online assessment tool for evaluating an enterprise's level of data literacy. This questionnaire aims to objectively measure how well employees understand and interact with their data - and communicate the results of their analysis - enabling them to meet their organisation's analytics needs.

The accompanying TDWI Data Literacy Maturity Model Assessment Guide provides a primer on what's driving the need for data literacy (including self-service and AI-driven analytics, diverse data types, and cloud data management) and explains the key components of a data literacy program. It also offers tips for interpreting an organization's assessment scores and provides guidance for companies at the beginning of their data literacy journey by explaining best practices used by companies that are more mature.

Today, more organisations than ever before are expanding their data and analytics strategy to larger audiences across the enterprise. Fuelled by trends in digital transformation, data monetisation, and advances in analytics technologies, these programs are democratizing data-driven decision making and aiming to inform decisions at every level of the business and across every functional area.

This trend is reflected in TDWI research, which shows that self-service ranks at the top of organisational priorities, with more advanced analytics (such as machine learning) not far behind.

To drive this expansion, businesses want to improve their overall data literacy. Data literacy involves awareness and recognition of the value of data, how well people understand and interact with data and analytics, and the ability to communicate data-driven insights to impact behaviour and achieve business goals. It includes understanding the business, framing analytics, understanding data elements, critical interpretation, and communication skills.

"Data literacy is not only for business analysts; this is a critical skill for individuals across a data-driven organization, although the level of literacy may vary based on role. Whether interpreting visualizations produced by other people or building full-scale analytics models, understanding how to interpret and use data is a critical skill," according to co-authors Fern Halper, vice president and senior director of TDWI Research for advanced analytics, and Chris Adamson, TDWI education director.

"The Data Literacy Maturity Model can help guide organizations on their data literacy journey. It provides a framework for companies to understand where they are, where they've been, and where they still need to go to support data literacy."

Users can take the online assessment by visiting tdwi.org/assessments.

ECM in a medical context

By Julia Thiem

The amount of data that accumulates over the years in a clinic from the countless patient files is colossal. An analogue repository fills up quickly, but digitalisation is also a huge task – one that can be easily accomplished, as a project by digitalisation expert ELO Digital Office has shown in the Portuguese capital of Lisbon.

Imagine you are the head of an affiliation of two public hospitals with 6,000 employees providing around 8,000 patients with care each day. And now imagine having to manage all files – employee and patient – in analogue, that is paper, format. You can only guess just how much administration takes place in the background. Especially if you consider how much data has accumulated over the years.

The figures above describe quite accurately the initial situation of both Portuguese Hospital de Santa Maria and Hospital Pulido Valente in north Lisbon, which were combined in 2007, forming the Centro Hospitalar Universitário Lisboa Norte, or CHULN for short.

In 2018, clinic management decided to digitalise all clinical files, which until then were either stored in paper archives or hybrid digital archiving medical systems. Stuttgart-based digitalization expert ELO Digital Office was commissioned with this mammoth project.

Its powerful ELO ECM Suite has already helped many companies, regardless of their degree of digitalization, to establish a foundation for automated, fast, mobile, and collaborative business processes.

During implementation, ELO Business Partner Outsafe IT from Lisbon provided support, lending a huge hand to CHULN in the project right from the start. The solution gave CHULN CIO Luís Salavisa and project managers the confidence to gradually roll it out to other services within their organization.

Hundreds of thousands of folders to just one

The biggest challenge of the project was the enormous size of the clinic and the associated volume of data. The task was to combine numerous paper archives, consisting of hundreds of thousands of different clinical folders, into one.

This required care and extremely professional planning. In addition, CHULN was already using other digital archiving solutions as well as a program for electronic invoicing.

Since the first meeting with CHULN, it became clear that the ELO project scope was intended not only for clinical purposes, but also to improve the hospital's business processes.

As part of the global project, all supporting business units such as HR, finance, legal, logistics, and many other shared services will rely on ELO ECM Suite to archive their information and improve operations by automating business processes, implementing workflows, and integrating the software with other business productivity tools.

Or in other words, the challenge was to find a solution that could meet the business needs for clinical records as well as back-office archiving and a certain degree

Digitalization simplifies access to data

of process automation. Finally, the large number of different types of staff that access and work with the solution had to be taken into account, making ELO the perfect solution: a platform that integrates seamlessly with existing systems that is also scalable and multi-tenant capable.

Of course, these properties were thoroughly vetted with a demo installation before the project managers made their decision.

But the greatest benefit is the time the doctors and medical personnel save each day. Thanks to ELO, they can access patient records, regardless of their specialty. With ELO ECM Suite, all files are stored in a single repository and quickly available in accordance with all GDPR requirements.

CHULN also has numerous medical solutions with their own archiving functions for patient exam data, for example the different imaging processes.

Another special requirement for a new system: Exams done outside of the hospital must also be part of the patients' clinical record. Until now, they were archived, but were only available at a later point in time, making administration more difficult.

With ELO ECM Suite, doctors and medical personnel are now able to access not only their own specialty clinical records but also records of other specialties at the hospital.

Convincing usability

But it wasn't just the comprehensive requirements that were all met by ELO. This German-engineered software has many other appeals, as CIO Salavisa reports: "The feedback from our team clearly shows how easy the platform is to use, which is why numerous other hospitals have already put in requests to implement the ELO solution."

Thanks to the central repository, physicians, surgeons, and other authorized staff members are now able to access patient files and other medical records directly from their workstations. Wait times for patients have been significantly reduced and the internal level of service has greatly improved.

As a result, Luís Salavisa cannot wait to roll out the ELO solution to other support services. Thanks to excellent collaboration between all project stakeholders, additional ambitious goals are already within reach.

A sovereign Australian government data framework

By Andrew Mitchell

The federal government set an example for state and territory counterparts in early June when it announced that all relevant government data under the Digital Transformation Agency's hosting certification framework will soon need to be stored only in either 'certified assured' or 'certified strategic' data centres.

The government's move follows concerns about the acute data challenges confronting the Australian public sector, including data sovereignty, supply-chain vulnerabilities and cybersecurity threats. The challenge once faced by Australian governments was completing their digital transformations; now, it's about figuring out how to adequately protect government systems that are hosted in the cloud.

More and more countries are addressing these data and digital issues through policy and regulation. Data localisation and targeted government procurement of digital goods and services are two ways governments may seek to secure their data, and the systems and infrastructure that rely on it.

Data localisation means keeping data within Australian borders—not just when it's stored, but also when it's processed. Targeted or sovereign procurement means not just selecting contractors that are operating in Australia but selecting those that aren't subject to the legal influence of foreign jurisdictions.

But these policies are often condemned in international trade law circles as discriminatory trade barriers. Government policy claiming to pursue the legitimate objective of data protection may be accused of promoting data protectionism in disguise. With Australia continuing to push ahead with trade liberalisation and wishing to maintain its reputation for honouring its international trade obligations, government data challenges will need to be addressed through balanced and proportionate measures.

I argue in a forthcoming report that a level of digital sovereignty is required for securing and developing Australia's national interests. The report also finds that Australia retains the regulatory autonomy under international trade agreements to adopt digital sovereignty measures that balance its liberalised trade agenda with its national interests.

The federal government now requires relevant government data to be hosted only by certified data companies. This is data at the 'protected' level or data belonging to whole-of-government systems.

This two-fold classification is a recognition of two realities. First, the threats posed by failure to protect government data are very different to those for other types of data. Second, there are particular vulnerabilities inherent in hyperscale cloud systems, where information belonging to various agencies is hosted together.

An inability to monitor, control and protect overseas data centres is an overt practical risk of using foreign clouds. It means uncertainty about the operational reliability of overseas data centres. Physical attacks, shutdowns, blackouts, natural disasters and regulatory interference are less able to be managed far away.

There are also risks of foreign interference by overseas governments and private actors, which are often legal in nature. Foreign agencies can exercise authority over cloud and data companies that are legally subject to foreign jurisdictions.

Australia's proposed bilateral agreements with America under the US CLOUD Act is an oft-cited example. Under that law, a US-based company can be asked by US authorities to relinquish access and control over data regardless of where the data is located.

Other vulnerabilities relate to weak points in the distributed supply chains of multilayered cloud systems, or the security defects of large-scale cloud providers that house multiple tenants' data simultaneously.

Importantly, accepted technological principles that emphasise security processes over data location don't account for other, non-cybersecurity-related risks. Data stored outside Australia may be stored in countries with political, social and economic interests that don't necessarily align with Australia's national interests, or by providers with obligations to such countries. Foreign facilities and personnel may not be subject to the same legal, regulatory and physical controls as domestic suppliers operating onshore.

So digital sovereignty concerns are intensifying because of the inherent risks associated with hosting government data in foreign clouds, and the threats that those risks pose to Australia's national interest.

It's this combination of urgent risks and threats that gives Australia sufficient latitude under international trade law to introduce proportionate, tailored digital sovereignty measures for the public sector rather than data protectionism.

Cybercrime and commercial cyberespionage against private citizens and enterprises are serious issues in their own right. But the consequences are potentially much graver when they affect government data.

Australian defence and intelligence agencies continue to rely more heavily on cloud computing and other emerging digital technologies to carry out operations. And digital technology is part of Australia's offensive and defensive cyber arsenals.

This dependence on digital technology is expanding even more rapidly in critical infrastructure sectors, where cloud technology and various cyber–physical systems are being used to control infrastructure. Recent remote attacks on power plants, refineries and gas pipelines have highlighted some dangerous vulnerabilities.

Measures designed to afford competitive advantages to domestic businesses may be seen as merely protectionist. However, the line between building stronger domestic digital sectors for industrial policy purposes and securing an adequate level of strategic autonomy is quickly fading. The widespread integration of digital technologies and their central role in government and other critical sectors has illustrated the legitimacy of protecting or promoting domestic capacities.

The federal government's tightening of its certification framework is a welcome acknowledgement of these risks and legitimate policy concerns that remains to be embraced by governments at the sub-national level.

However, there is now an opportunity for all Australian governments to improve on the federal approach. Companies certified under the current framework don't need to be Australian owned and controlled or even have their operations exclusively in Australia.

A better approach, and one that's commensurate with the risks, would be much stronger provisions to ensure that data hosts are Australian owned and based.

The personnel and supply-chain assessment procedures and strict requirements that limit changes in ownership and control under the current framework may be sufficient to maintain Australian government control over its own data. But as they currently stand, the existing arrangements fall short of a truly sovereign framework for government data.

Andrew Mitchell is a professor in the Faculty of Law at Monash University and a member of the indicative list of panellists for World Trade Organization disputes. This article is based on independent research supported by funding from Macquarie Telecom Group.

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The Digital Mailroom - The Holy Grail of Remote Working

The COVID-19 pandemic has accelerated digital transformation like never before and in particular the need for a digital mailroom.

Many businesses struggle with processing and distributing incoming correspondence. Much of this mail is time-sensitive and critical to the business. Physical distribution of mail can be time-consuming and prone to errors, with mail being sent to wrong recipients, lost or forgotten or filed incorrectly.

In the past, posted mail, invoices, orders and other documents would be hand-delivered to an employee's desk but with so many employees now working from home on occasion, hand-delivery is impossible.

While over the year's businesses have already invested in a digital mailroom solution, the majority had not at the time the pandemic hit. Digital Mailrooms are in demand more than ever with many businesses continuing to implement flexible working with employees able to work from home.

This makes it even more difficult to send mail in a timely matter to workers. Mail could sit on their desks for days until they are in the office next or could be lost. Without the ability to quickly process physical mail, companies risk disrupting important workflows like invoice processing or completion of critical forms and applications

EzeScan's Digital Mailroom Solution can help you digitise and action your mail faster by digitising your mail as soon as it enters the organisation!

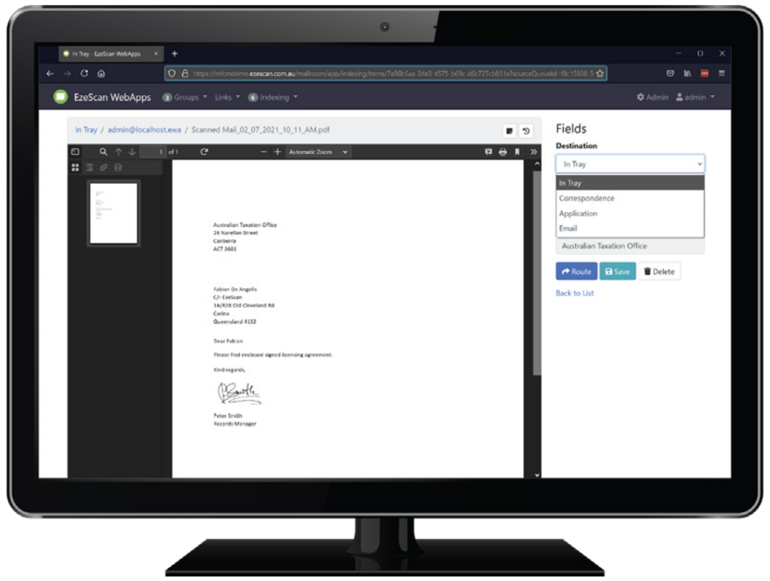
Digitise Your Mail with Ease

With EzeScan and a high-speed TWAIN/ISIS compliant scanner or MFD, your mailroom staff can quickly digitise incoming mail. EzeScan's user interface makes it easy for an operator to capture relevant metadata and easily distribute to the right person or workflow.

Optional smart capture modules are available to automatically look for and capture relevant information which can reduce and, in some cases, eliminate manual data entry.

Distribute To Your Staff Quickly & Securely

EzeScan's Digital Mailroom solution eliminates the delays with physical mail distribution to get your information to the correct people faster. End users or business units can view, action and register their mail



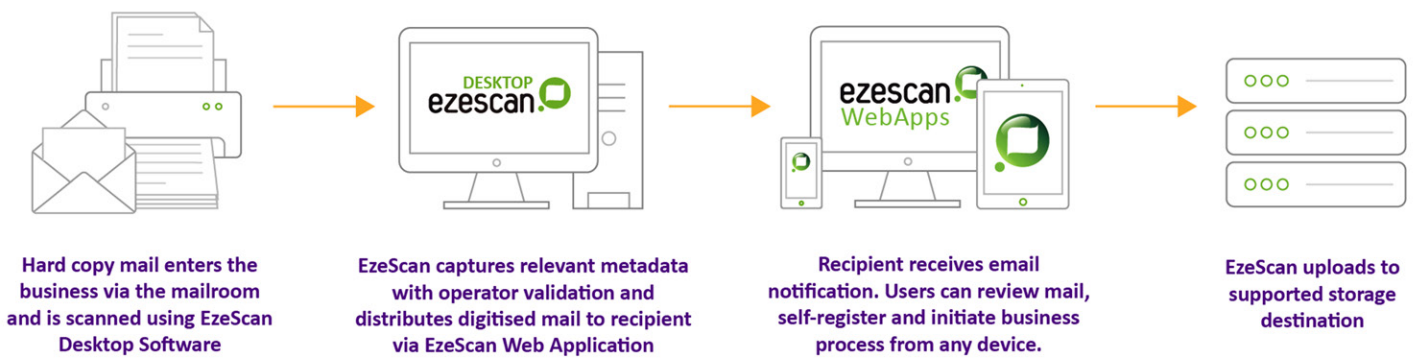
EzeScan Digital Dashboard, where a user receives and processes their mail. From here they can download, register to EDRMS, route to other users or business units.

in EzeScan's Remote Indexing WebApp on any device from any location. From here users can automatically initiate EDRMS record actions or workflows to ensure documents are named and filed correctly into your EDRMS if required. EzeScan supports integration with over 40 popular EDRM systems.

With EzeScan's Digital Mailroom solution you can...

- Digitise your mail with ease
- Provide instant recipient notification of incoming mail
- Distribute your mail quickly and securely (multiple recipients and locations).
- Reduce the risk of lost mail
- Initiate faster business transaction processing
- Streamline end user self-registration of mail into EDRMS
- Automatically initiate EDRMS workflow on mail
- Align business processes with governance, regulatory and digitisation standards

For more information on EzeScan's Digital Mailroom Solution visit our website or contact our sales team at sales@ezescan.com.au



Here's How EzeScan's Digital Mailroom Works

Insuring against COVID-19 at Pacific Life

Based in Newport Beach, California, Insurer Pacific Life has expanded its use of EzeScan capture technology to establish Digital Mailrooms (DMRs) in response to COVID-19 and digitise and automate many business workflows linked to OpenText and SharePoint document stores.

Pacific Life has been offering insurance products for over 145 years. It provides a wide range of life insurance products, annuities, and mutual funds, pension plans and offer a variety of investment products and services to individuals and businesses.

With more than 3000 employees, Pacific Life counts more than half of the 100 largest US companies as its clients.

In the wake of stay-at-home orders meant to slow the spread of COVID-19 in the US, physical mail delivery remained an obstacle to remote work.

Pacific Life still needed to periodically send employees to the office in order to collect business-critical mail.

This process was proving to be inefficient, mail collection was delayed, and employees were being exposed to unnecessary risk.

Mail Backlog

A backlog of mail had been building up at offices, so a DMR solution was needed. One that could be implemented very quickly, but also upheld strict security standards.

Pacific Life Facilities was looking for a solution that could implement a better mail system within days, while also providing chain of custody tracking and full information security.

It began deploying Digital Mailrooms in 2020 to provide web-based, end-to-end workflow that enables Pacific Life to streamline the intake and distribution of inbound mail.

52 mail stops (physical) were converted to digital with return to office mail also able to be routed digitally

The volume of documents able to be processed by the new Digital Mailrooms can range from 300-1200 pieces daily in 2 different locations

EzeScan technology provides intelligent data extraction and indexing, automates formerly manual processes, and utilises electronic delivery methods to route mail to the correct recipients.

Pacific Life utilises a mix of traditional EzeScan Workstations and newer WebApps technology for capture and processing of documents in a number of business areas.

EzeScan WebApps

The DMR solution is built on EzeScan's WebApps, powerful business process automation applications designed to be used in conjunction with EzeScan SERVER or EzeScan PRO to deliver hard copy document and electronic file capture, conversion, processing and routing directly to the desired network location or supported line of business applications.

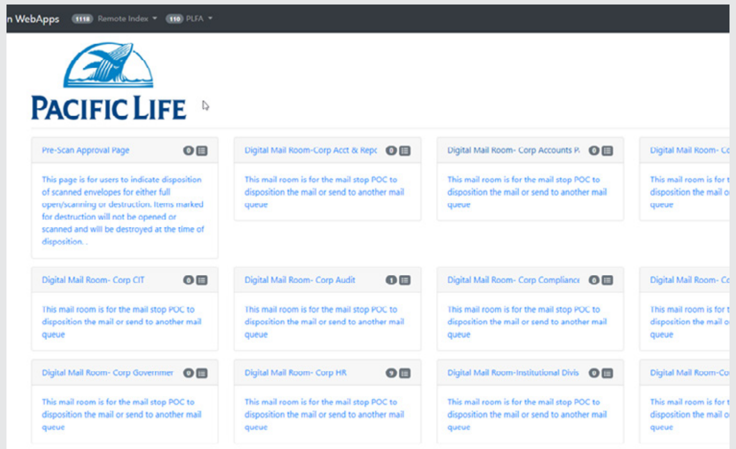
EzeScan WebApps include the EzeScan WebApps Server (EWA), a HTML5 web application deployed onto a Microsoft IIS Server.

Records and Information Managers can configure each WebApp to deliver the required business digitisation workflow to their whole organisation. Users can access the EzeScan WebApps from their favourite web browser enabling them to be run from PCs, Apple Macs and mobile devices like tablets and smartphones.

Supervisors can also view various workgroups/workflows to get an overview of users, groups or tasks outstanding and where they are in a particular workflow.

EzeScan WebApps allows workflows to be configured based on established business rules to designate proper delivery routes, user and group-specific delivery methods, and replace physical mail handling procedures.

Automation technology included in EzeScan WebApps enables rapid pickup and processing once scanning has occurred, with data extraction and routing also provided. Faster information processing and simplified information sharing improves decision making.



The Digital Mail Room is accessible from the top menu or from the main display of the Pacific Life intranet.

Physical mail is difficult to keep secure. Now, digital mail is routed and available using 256-bit encryption and access is restricted according to defined roles and permissions of Pacific Life's Active Directory/Azure (users & groups).

Jessica Nilsen, Senior Business Analyst, ECM at Pacific Life said, "Most DMR workflows were deployable within 10 days after initial questionnaire and design. EzeScan WebApps provides the ability to build on the foundational solution to launch downstream processing using ECM workflow solutions or handoffs to our ERP systems (PeopleSoft, Workday).

"It links automatically to many of our existing line of business solutions without the need to separate coding or support."

"Establishing the DMRs has strengthened information security, provided cost savings through the elimination of remailing and means that all our mail is accessible anywhere, anytime via the Web."

"EzeScan WebApps offers an easy-to-use platform that requires minimal training and improves engagement, automates processes while improving insights and reducing risks."

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

Tips for tackling dark data on shared drives

By Kyle McNabb, ASG Technologies

With the pandemic pushing life further online and remote work becoming the norm, companies face growing risks and challenges with "dark data" – data collected and stored but never used. Much of this "dark data" hides in documents, spreadsheets and content scattered across the enterprise on shared drives, Microsoft 365 and SharePoint.

According to ASG's recent survey report, What's Slowing Modernization? Barriers Hindering Enterprise IT Systems and Content Management, the top content management challenge is employees saving content on shared drives/personal drives (41 percent), which is happening at 58 percent of respondents' organizations.

This way of working slowly builds a seemingly bottomless lake of mismanaged, ungoverned data. Although many companies had initial success in managing structured data, unstructured data remains a dangerous black hole for enterprises, putting the organization at risk of non-compliance with privacy regulations and making it vulnerable to steep fines if this information is not properly managed and governed.

As the explosive growth of records and "data hoarding" continues in the new normal, organizations need to rethink how they find, classify and manage critical, personal and sensitive information across the enterprise.

Here are some tips for organizations seeking to track down unstructured "dark data" living in collaborative spaces.

1. Prioritize "dark data" discovery in your governance practice

Dark data is becoming an increasingly pressing issue in the enterprise – with IDG predicting that 93 percent of all data will be dark and unstructured by 2022.

As organizations wake up to the scale of the problem, it is essential that they make it a priority to understand both the structured and unstructured data that they house within their vast stores of documents and records.

To start, an organization must catalogue and map its entire data ecosystem, not just its structured data sources. Taking this first step enables organizations to classify and understand what data is useful, redundant and must be governed.

Embracing content and metadata management solutions that provide discovery and classification, at scale, using machine learning and AI puts a shining light on "dark data."

Using these kinds of solutions allows enterprises to automate cumbersome and time-consuming manual discovery processes and locate the potentially valuable and risky data scattered across the enterprise.

Today's content and metadata management technologies enable organizations to automate and streamline governance practices.

Barriers to understanding and governing "dark data" continue to be lowered allowing organizations to improve usage and governance of data.

2. Extend your information governance to shared drives, SharePoint and Microsoft 365

Remote work is here to stay, and so too is usage of cloud-based collaboration tools and platforms such as Microsoft 365, SharePoint and Teams.

Organizations need to balance improved productivity as employees use these tools with mitigating risks associated to sensitive information being created and shared in these less secure environments.

Organizations need to extend their governance strategies to shine a light on the "dark data" created and shared by employees, partners and even customers using these collaboration tools and platforms.

Unintentional use of social security numbers, account numbers, phone numbers, pictures and images put organizations at the tremendous brand and financial risks with expanding privacy regulations.

As more states and countries pass data privacy regulations that result in sometimes complex constraints for enterprises, extending governance to these tools and platforms is now a must.

With today's content and metadata management technologies, organizations can extend governance that encompass privacy considerations, automating processes and reporting, while minimizing negative impacts to end user productivity.

Remote work and usage of cloud-based collaboration tools and platforms can continue to expand while "dark data" in Microsoft 365, collaborative workspaces, shared drives, and more becomes better understood and governed.

3. Automate redaction and disposition policies

While discovering untapped data across the enterprise can be beneficial to organizations in terms of both ROI and business growth, securing and protecting sensitive and personally identifiable information also needs to be a priority for businesses in today's increasingly regulated world.

A key aspect of data privacy regulations, such as the GDPR and CCPA, is the "Right to be Forgotten." As more and more personal information is collected and stored and consumers take more ownership of their data, organizations need to ensure "dark data" isn't undermining their compliance with these data privacy regulations.

Companies need to tackle the right to be forgotten, and advanced retention and redaction capabilities are critical to not only ensure organizations are following through on their customers' right to be forgotten, but also to overall regulatory compliance.

By adopting a content services solution, organizations can automate processes such as migration, legal holds, redaction and dispositions based on business rules and user roles to prevent privacy issues.

This includes predefined personal and sensitive content sets including names, addresses, telephone, gender, marital status and social security numbers.

These solutions can also enable regular auditing and pruning of an organization's databases, data lakes and unstructured data sources, cataloguing the data that needs to be held for legal reasons or business value and archiving the rest.

Organizations must be sure not to let the very innovations that sustained their business in 2020 be their downfall in 2021. Collaboration tools and shared drives enabled the rapid shift to remote work, but it's now time to address the risk they introduced, especially when it comes to information management.

Not only does "dark data" increase risk around data privacy regulations and governance, but it's also leaving value on the table. By identifying, governing and leveraging dark data, organizations can make better use of all their assets – turning what was at one time a liability into a truly competitive edge.

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EzeScan is one of Australia's most popular production capture applications and software of choice for many Records and Information Managers. This award winning technology has been developed by Outback Imaging, an Australian Research and Development company operating since 2002. Solutions range from centralised records capture, highly automated forms and invoice processing to decentralised enterprise digitisation platforms which uniquely align business processes with digitisation standards, compliance and governance requirements. With advanced indexing functionality and native integration with many ECM/EDRMS, EzeScan delivers a fast, cost effective method to transform your manual business processes into intelligent digital workflows.

EzeScan benefits include:

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

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When Email needs to be Forever

By Dietrich von Seggern, Callas Software

According to a recent survey conducted on behalf of the digital association Bitkom, an average of 26 emails are received per professional mailbox in Germany every day. Processing them takes up a large part of working time. In addition, emails are an integral part of processes.

Some of them must be retained under tax law, including purchase orders or invoices, but also any documents that may be relevant in connection with a business transaction. In addition, electronic messages often contain valuable knowledge that must be retained.

But how can emails be elegantly archived? To date, there is no supreme solution. However, for a number of reasons, the PDF route currently seems to be the most practical.

The good news is that emails are digital per se and already contain metadata. This makes it fundamentally easier to archive them than paper-based communications. However, in many cases, there are no company guidelines in this regard, so users decide individually how to handle their emails. As a result, there is a high risk that business-relevant messages are lost.

Emails are handled by various specialized systems that enable the creation, transport, viewing and storage of these electronic messages (lifecycle: client, server, relay, archiving system). For more on archiving emails, we will have to deep dive in what an email consists of.

The header is basically the equivalent of the letterhead and contains the sender and recipient information, the creation date and some optional information such as the subject in the form of metadata. Often, an ID is also included here to help the email client associate it with other emails when an email sequence consists of replies and forwards.

In order to properly assess emails and the reliability of header information, it is important to understand that the actual routing is independent of the header data and takes place via the Simple Mail Transfer Protocol (SMTP). The SMTP acts as an envelope, so to speak, and controls the routing of the electronic message.

The email client therefore sends an SMTP call to the email server together with the user data of the email (including the header), which contains the address of the recipient and is decisive for the routing.

The body, i.e. the actual mail content, is displayed differently depending on the user-defined settings in the email software. Possible are plain text (ASCII) without umlauts, simply formatted text (like bold or italics) with support of country-specific encodings (umlauts) as well as extensive HTML formatting with embedded images, etc.

An email file can contain multiple variants at the same time and there is no guarantee of corresponding content: It is readily possible to place different text. Often, for example, the ASCII text part only contains a note that an HTML-capable email client is required for display. This is a crucial aspect for possible format conversions during archiving.

The third, optional part consists of attachments. This is where the infinite field of file formats, feared by every archivist opens up: These are often documents or images, possibly combined in a ZIP file, but exotic file formats or executable programs or scripts can also be included.

As already described, email is transported via the SMTP protocol, namely from the client to the server at the sender, then via the Mail-Relays to the server at the recipient and from there to the recipient's client.

Since emails are often sent in "conversations" as replies and the complete history is not always included, it would be ideal to archive the entire mail system in order to be able to fully trace the email communication with all steps later on. In practice, this is obviously rather unfeasible. Alternatively, it would be good if at least the receiving or sending mailbox could be archived completely with all references of the emails to each other.

To date, however, there is no standardized, interoperable approach to this, although there are some interesting initiatives and approaches (e.g. a report recently produced by the University of Illinois with the support of the PDF Association).

Furthermore, such an approach is problematic because the technology most commonly used in business processes by Microsoft uses its own proprietary format (MSG). Although it is documented, it is subject to frequent changes.

Content is sometimes not even inserted into the body of the email by the programs, but sent as "Winmail. dat" attachments, which can then only be interpreted and displayed by appropriately prepared clients on the recipient side. For these reasons alone, it seems essential to convert the emails into a standard format suitable for archiving.

This becomes even more overwhelming when attachments are taken into consideration. Here, there are no limits to the imagination as to which file format is used in the attachments. It is therefore impossible to guarantee that an application will be available for years, or even decades, with which the attachments can be displayed - one of the reasons why PDF/A was developed and became established so quickly.

To break free from this dependency, system-independent archiving of all emails and attachments in PDF/A is recommended. The format has long been established for general archiving purposes. Recently, the PDF/A-4f conformance level has become available as the successor to PDF/A-3, in which any files can be embedded. On this basis, at least the question of format for email archiving can be answered satisfactorily.

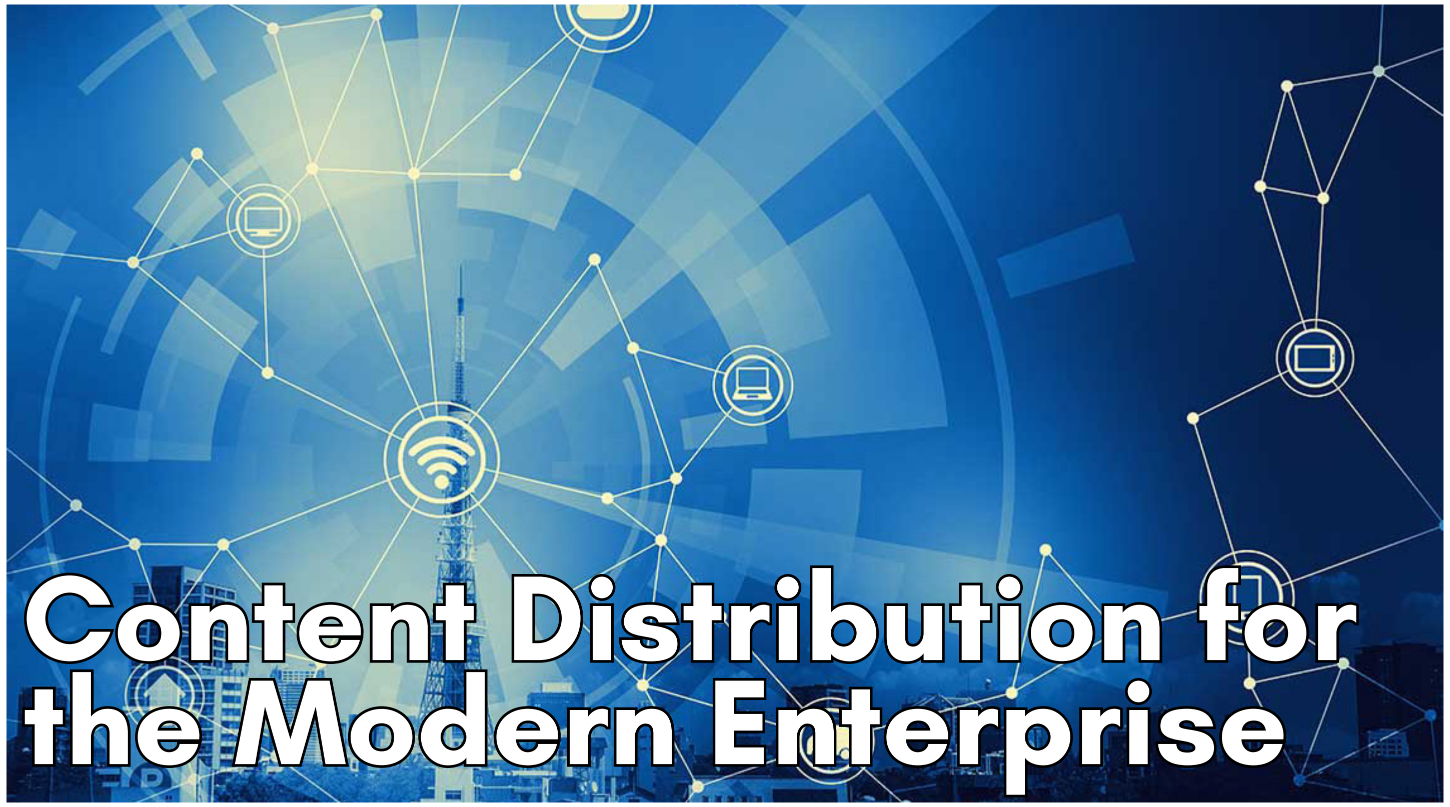
Most email systems offer an export function to PDF. Unfortunately, however, this approach often falls short, because usually only the email body is taken into account and not the header or any attachments. If emails are to be archived in PDF in their entirety, the header data should be saved as XMP metadata in the PDF file. This can then be used as the basis for a targeted search for emails.

The email body is ideally converted on the basis of the body branch (plain ASCII, formatted text, HTML) that most comprehensively reflects the content. Links or referenced images in HTML must then also be integrated.

The greatest flexibility in the use of archived emails is available if the original email file in EML or MSG format and the attachments are also embedded in the PDF, which is possible with PDF/A-3 or PDF/A-4f.

But experience has shown that this is not the only reason why emails archived as PDF/A are almost always larger than the original files. Another factor is that the PDF/A standard requires the embedding of fonts or ICC profiles for colours in order to ensure the reproducibility of emails over the years.

On the other hand, file size can be minimized via compression methods built into the PDF, an option that does not exist in "email formats".



Content Distribution for the Modern Enterprise

By Doug Kennedy, Adaptiva

Digital transformation is rapidly accelerating, which is enormously exciting as industries evolve for the future. But change does not come without some bumps in the road. One area that enterprises have struggled to figure out is efficient content distribution.

Content distribution isn't something that people talk much about, or at least they didn't prior to the pandemic. Problems like security, automation, and IT staffing issues garnered more attention in recent years. After all, mechanisms for content distribution have been around for a long time; all the kinks are worked out, right?

Not exactly. The desire to move to the cloud for greater flexibility and cost savings has made content distribution significantly more complicated. Problems get bigger and much more expensive — and things like security, automation, and staffing become inextricably tied as enterprises grapple with network health.

So how does content distribution work, and why is it essential to create successful modern environments?

The Importance of Efficient Content Distribution

Briefly, content distribution involves getting all the patches, applications, and other updates - Office 365 updates, third-party applications, internally developed applications, and even operating systems - to every endpoint that needs it. All of this "stuff" is essential to maintaining network security and system performance and, in the case of updates, to properly connect and interoperate with customer and partner systems, keeping them bug-free.

Content delivery networks (CDNs) are used to deliver this vital content faster and reduce latency. A traditional HTTP-based CDN is made up of a bunch of servers, which are geographically distributed in a way that they are positioned between the receiving server and the server that sends the content. Once a user requests content, the data is split into smaller chunks and sent through all the incorporated servers. The same goes for the next user who requests the same content — and so on and so forth.

This sounds simple enough, and maybe it used to be. But the world changed when COVID-19 struck. With entire workforces leaving the corporate nest at the beginning of the pandemic, scheduled maintenance and regular content distribution no longer happened at the rate it should because it had to go over VPNs instead of traditional corporate networks.

Content distribution via VPN takes much longer and dramatically reduces network performance, if updates go through at all, which is sometimes difficult to ascertain. As a result, content distribution has often been scuttled in favour of being able to function and complete day-to-day work.

This has put organisations in a precarious position. Bad actors know that system hygiene has been lax, and they've been more than willing to take advantage of the tiniest unpatched hole, conducting cyberattacks that can wreak havoc on an organisation. Because of this, many enterprises looked to move to cloud-based environments, which has opened a whole new set of issues.

Content Distribution at Scale

Imagine 30,000 employees all trying to download a piece of content from the cloud at once. The time and the disruption to processes required to accomplish this would be staggering, not to mention that it would be difficult to ascertain whether every endpoint completed its download. This scenario is completely prohibitive, and it's been the only option until relatively recently. There had been no way for companies to reliably scale content distribution in the cloud, which is why so many organisations still rely on conventional servers or hybrid environments.

To overcome these obstacles and ensure that systems function as they should, many organisations now leverage peer-to-peer computing models because of their ability to perform specific tasks remarkably quickly and at enormous scale. When leveraged for content distribution, peer-to-peer technology takes unused, available compute and storage capacity that exists on endpoint devices, and it stores and shares content without the need for local server infrastructure. It also minimises traffic over the wide area network (WAN) and rapidly distributes content to the endpoints.

Modern peer-to-peer content distribution systems are very smart. They identify the best location to which content can be accessed via a single download, which then serves all the devices in the same subnetwork. Because of the intelligence built into the most advanced systems, they can recognise traffic running across the network and change course in advance to avoid congestion and conflicts with other enterprise traffic.

Additionally, they can sufficiently maintain a connection in the most adverse conditions to be able to complete the download regardless of quality of network or duration. These factors make content distribution via peer-to-peer far more reliable than other methods.

These systems can also manage storage of content locally and oversee the content cache in a manner that doesn't impact the end-user experience. All of this goes on seamlessly in the background in real time across hundreds or thousands of locations, but it doesn't happen haphazardly. Administrators have complete visibility and control, viewing content as it is being distributed by location or content type. If an administrator notices a problem or the system indicates an issue, the admin can pause, resume, or reprioritise the distribution flow.

Notably, peer-to-peer models don't require any HTTP servers. Instead, they work by connecting the users via WebRTC, without the need for a plug-in to be installed on the user's device. Content is downloaded once from a CDN (which is still the mechanism for content delivery) to a peer, and because the CDN provider has cached that content globally, the peer-to-peer network can get the content from the closest location, thus reducing latency and speeding the download. Content is grabbed in chunks so if the CDN server was to become unavailable, the content request would simply go to the next location using http or https - in other words, delivery won't stop if one roadblock gets in the way.

There are also different ways peer-to-peer systems can be deployed. BitTorrent, for example, sources content from many peers at the same time. Other vendors create a daisy chain of peers so that no peer is overwhelmed with requests. In this model, a request on the local network is for the specific piece of content.

If no one has it, then the system elects a peer to start the download from the parent office or the CDN location depending on the client location. They grab a chunk and pass it off to the next peer then save it to disk. Thus, the transfers are all done in memory and over the network, which is faster than introducing disk into the picture. This is repeated until the content is downloaded. If a peer drops off the network, the next one picks up exactly where it left off — there is no content retransmission.

Peer-to-Peer Content Distribution in Action

So, what does this look like in practice? Suppose you're an international retailer. Traditionally speaking, you would have had to deploy and maintain thousands of servers all over the world for the sole purpose of staging content for local distribution and providing a preboot execution environment (PXE) for their OS deployment. A server would be needed in every store and every distribution centre. This is a massive expense and waste of resources. Couple it with the fact that some locations' network connectivity might be poor, making it difficult to maintain a connection long enough to download content reliably. This very common setup seems outdated at best.

Now, consider what this scenario looks like with an intelligent peer-to-peer solution at work. All those servers would be gone, and your software would be distributed and machines imaged across the globe in record time, regardless of what kind of environment you had at home base (on-premises, hybrid, or cloud) - without reliability concerns, without performance issues. The difference between approaches is staggering.

Using peer-to-peer, your organisation would save millions of dollars each year by eliminating hardware and network costs. You'd gain all of the time back those employees devote to managing servers, which could be redirected to other priorities - all the while ensuring that endpoints stay properly configured and up to date for a more secure, highly optimized network.

Additionally, with the right peer-to-peer content distribution solution, bandwidth is no longer an issue, and users have content immediately available at each location for new installs or updates because once content is downloaded, it is always available to serve to any device that requires it. This can mean a difference of hours, days or sometimes even weeks saved in getting a new piece of software delivered and installed for the user.

If the peer-to-peer solution is properly architected and sufficiently intelligent, you eliminate the single point of failure as well by having the content available from multiple sources in the local subnet, whereas the loss of a single distribution server in a traditional client server model can bring all software distribution to a halt. An intelligent peer-to-peer solution will always make sure that content storage is sufficiently distributed locally so that loss or removal of any endpoint or multiple endpoints will not preclude content from being available to other users.

Taking It to the Cloud

Innovation in the space has been in overdrive since the pandemic started, and now a single download solution is possible in a cloud environment, eliminating bandwidth issues altogether. These next-generation content distribution systems are extremely flexible and can handle hybrid or full cloud environments, which gives enterprises the green light to move forward with their digital transformation as they see fit.

Shifting to a peer-to-peer content distribution solution is a smart move in any infrastructure environment, but now it enables digital transformation to make sense by getting rid of network strain and delivering content securely at massive speed and scale. It also ensures that content is actually delivered so that enterprises can operate safely, reliably, and efficiently. Peer-to-peer should be considered the optimal model for both the present and the future of content distribution.

Doug Kennedy, chief operations officer at Adaptiva, draws on his three decades of enterprise technology experience to lead Adaptiva's business development, strategic relationships, and channel programs. Throughout his career, Kennedy has led a wide variety of programs and initiatives for some of the world's biggest enterprise technology companies. Prior to Adaptiva, Kennedy served in executive roles with Oracle Corporation, NetSuite, and Microsoft.

Hyland's OnBase wins at Australian mining company

Hyland's content services portfolio has been successfully deployed by a large group of companies with diverse interests across western and southern Australia including in mining and commercial property.

The organisation runs a relatively complex business environment due to the diverse nature of various business departments and a workforce that is dispersed across the country. This makes collaboration difficult, and the sharing of documents across departments, divisions and companies holds significant challenges.

Previously, the group had used a Document Management System (DMS) based on Lotus Notes. The solution had been in place for over a decade and had become an integral part of communication, collaboration and workflow at the organisation.

However, the system had become outdated as functionality had diminished when new data sources were brought online and staff found the system difficult to use. As a result of this decreased functionality, the organisation found staff could no longer maintain their records in the system as scrupulously as they were previously.

The existing solution was also plagued by a poor search capability, making it hard to locate documents and thus holding up work and reducing collaboration.

The solution also had no remote capabilities, so staff were unable to access documents stored in the system from the field or from home.

It was also not suitable for use by senior management, so staff felt compelled to send documents to management independently from the system. The result of these issues was a document management system that was under-utilised with no staff ownership of the service.

The organisation made the decision to search for a replacement solution, and a committee was created to identify requirements; it prioritised a user-friendly system with a simple, easy-to-use interface and excellent search capabilities.

It would also need to have seamless and secure remote working capabilities for selected documents. The controls for accessing particular documents and categories would need to be simple to set, maintaining granular security over documents and providing access privileges to individual staff.

The committee recognised that property managers in the group's Real Estate and Commercial Real Estate divisions would require deep collaboration capabilities in order to maintain up-to-date workflows and work on shared accounts.

Lastly, the committee decided that a solution should be integrated with the group's accounts payable software to streamline back-office processes.

Ultimately, the decision was made to search for a complete service provider rather than using in-house capabilities to develop proprietary software.

Following a competitive evaluation, Hyland's OnBase content services platform was selected by the committee on the basis that it represented excellent value and met the following criteria:

- Good user interface for better user experience
- Excellent search features
- Automated workflow for account and payments approval
- Secure and consistent access to documents out of office
- Collaboration across properties for property managers
- Easy integration with Microsoft Dynamics NAV for key data and accounts payment creation
- Integration of features into the core product
- Accommodation of complex group of companies and industries

OnBase is a low-code enterprise information platform for managing content, processes and cases. It is modular by design, allowing organisations such as this to tailor a solution to their specific business needs. OnBase is the central part of Hyland's broader product portfolio, providing a full suite of content services solutions.

The platform speeds up processes and reduces costs by capturing important information into one system and managing those processes along with data and documents.

OnBase integrates with the organisation's existing IT systems, providing instant access to everyone in the company who needs it, and giving visibility to business processes and system performance. Essentially, the platform securely stores, protects and ultimately provides a means of destroying the group's information once it reaches the end of its life.

Deploying the solution

Hyland performed the project management for the deployment, design and integration of the system and technology implementation.

The organisation worked with Hyland on the design and testing phases of the deployment, while the organisation's IT department facilitated the technical aspects of the system build.

Once OnBase was up and running, the organisation quickly realised a host of benefits. Ease of search removed most pain points for storing, finding and working on documents, and there was less frustration among staff and management, as the system made finding and collaborating on documents and workflows easier.

Documents were able to be securely shared across employees and companies within the group, empowering people to communicate more openly on workflows. Real Estate managers were able to upload and share information remotely and collaborate on accounts more efficiently.

Overall, the group has witnessed a rise in ownership among users as employees took more stock in the usage, storage and collaboration of documents, files and data.

Following the success of the rollout, the organisation plans to widen the use of OnBase to other areas of the company. Phase Two has recently gone live, involving an AP automation solution using OnBase with Hyland's Brainware intelligent invoice capture software.

4 Paths for a Dynamic Digital Transformation

Research by Bain & Company finds that while executives embarking on digital transformation have historically focused on speed, the ability to scale is rising as an imperative

Companies have typically prioritized the speed in which they implement digital transformations across their organizations to combat digital disruption. However, these promising digital transformation initiatives often lose momentum and fail to produce the broad impact needed to compete in today's world.

In Bain & Company's annual survey of 1,200 international business leaders, Bain found a growing realization among leadership teams that speed alone is not enough to capture the full value of digital transformation for an organization. Rather, companies are now learning to prioritize scaling their best digital services to create lasting impact across their operations. This typically requires retooling an organization's technological architecture and integrating digital fluency into its business functions.

These findings, among others, are outlined in Bain & Company's new report, Four winning patterns of digital transformation. By analysing companies' most effective efforts, Bain identifies four key patterns of digital transformation that allow companies to both compete and rebuild in the digital landscape:

Laying down the digital foundations. This often involves companies that are under pressure to develop new digital capabilities and are essentially starting from scratch. The threat is clear and evolving steadily but has yet to produce a burning platform for change. Many industrial companies find themselves in this situation.

Integrating a fragmented digital landscape. Companies that fall into this next pattern suffer from digital fragmentation. They have no shortage of digital projects bubbling up across the company, but they lack the ability to prioritize the most promising initiatives and scale them across the organization.

Digital transformation front to back. The third pattern also confronts the legacy conundrum in the core business, but the problem in this case is different. Rather than a fragmented IT architecture, these companies have years of accumulated systems that were built on top of each other as the business evolved. The resulting tangle of tech infrastructure ends up being inefficient and inflexible, slowing down the company's reaction time.

Launching a new digital attacker. Sometimes the magnitude and pace of disruption in an industry require more change than an incumbent company can support. Its size, complexity or resistance to change might prevent it from moving fast enough to remain competitive. Increasingly, the answer is to launch an entirely new business to attack opportunities that the core business cannot. A digital attacker is both an offensive and a defensive bet. On offense, it allows companies to enter a new market with a tailored, lightweight solution that is free of legacy baggage. On defence, it gives the company a fresh value proposition to attract new customers within its existing market—for instance, aiming at millennials, students and young professionals to build the customer base of the future.

ABBYY ML adds Python support

ABBYY has announced a major update for NeoML, its cross-platform open-source machine learning library that allows developers to build, train and deploy machine learning models. The update adds support of the Python programming language, the most popular language for machine learning and AI.

The framework also offers 5-10x speed improvements as well as 20+ new ML methods including 10 network layers and optimisation methods. Additionally, NeoML now supports Apple M1 chips, GPU on Linux-based machines, and Intel GPU. This significantly expands addressable use cases and scenarios for the library while enabling more developers to use it to build AI-powered applications and solutions.

Now, with the added Python support, more developers and organizations will be able to utilize NeoML to build, train and deploy models for object identification, classification, semantic segmentation, verification and predictive modelling to achieve various business goals. For example, healthcare organizations can streamline administrative processes, map infectious diseases and personalize medical treatments; insurers – predict premiums and losses for their policies.

The considerable speed improvements have made NeoML one of the fastest machine learning frameworks on the market. Now it offers up to 10 times faster performance for classical algorithms and up to 30% faster neural network training and inference than the previous version.

Compared to the two most popular open-source machine learning libraries, NeoML offers 50% faster performance on average. This makes the framework uniquely suited for developing customer-facing cross-platform applications that require both seamless user experience and on-device data processing. One of the key advantages of NeoML is its high cloud efficiency, which allows businesses to make the best possible use of available cloud resources.

NeoML is designed as a universal tool to process and analyse data in a variety of formats including text, image, video and others. Users can deploy models anywhere: in the cloud, on-premises, in the browser or on-device. The library supports C++, Java and Objective C programming languages and offers 20+ traditional ML algorithms such as classification, regression and clustering frameworks.

Its neural network models support over 100 layer types. The library is fully cross-platform – a single code base that can be run on all popular operating systems including Windows, Linux, macOS, iOS and Android – and optimized for both CPU and GPU processors.

NeoML is available now on GitHub. Developers from the USA, Canada, Germany, the Netherlands, Brazil, China, India and South Korea are already using it in their projects. The framework's algorithms are also being utilized throughout ABBYY's product portfolio. The company offers personalized developer support, ongoing review of reports, regular updates and performance enhancements. Going forward, ABBYY plans to add new algorithms and architectures.

https://github.com/neoml-lib/neoml

Artsyl automates document capture

Artsyl Technologies has announced the release of docAlpha 6.4, adding greater intelligence and focused functionalities to its proprietary digital transformation platform. docAlpha 6.4 introduces a no-OCR Data Ingestion option to fill fields digitally in the case of digital documents. One of the priorities with the launch of docAlpha 6.4 has been to reduce the number of steps needed to complete a job.

With this custom digital import feature, users can browse, parse, and read incoming documents in any format, and map it to fields in the backend profiles of ERPs/ECMs - without the need for advanced capture or OCR. The new version brings with it a great deal of workability and flexibility for users to configure specific steps for document recognition the way they like - in any order within the same workflow, with the option to discard or add workflow steps a la carte. Document recognition, separation, and splitting parameters can be modified.

There are options to perform functions like zonal or full-page OCR, text-based or image-based document classification, document assembly and separation, including based on self-learning technology, in any order, depending on the job at hand.

Another key feature in this version of docAlpha has been the introduction of a Universal Data Provider (UDP) that dramatically removes the complexities associated with any backend programmable environment.

ERPs and various document management systems work using different communication protocols including SOAP, REST, and web-based APIs. Implementing docAlpha with each of these complex backends is simplified as the software views the entire backend as a simple data source. The newly developed UDP for Acumatica greatly removes the need for customizations and the endless cycle of running and testing custom rules.

Other feature upgrades & enhancements include:

• Timer- and schedule-based events to coordinate document processing steps and workflow team collaboration based on specific events and time-sensitive requirements

• Option to apply multiple OCR engines each with potentially different settings and processing goals

• A range of import and export connectors for end-to-end intelligent document processing

• Real-time dashboard to monitor workflow progress and status of jobs and reveal any bottlenecks

https://www.artsyltech.com/

Box ECM integrates e-signatures

Box has added native e-signature capability, to users of its Business and Enterprise plans at no additional cost. Box Sign delivers unlimited signatures and a set of APIs, enabling businesses to digitise and modernize the way agreements are managed and governed in the cloud.

Following the rollout of Box Sign, basic functionality will be included in all Box business plans and advanced features that help automate high-volume, complex e-signature use cases will be available in higher-tier plans.

In February, Box acquired SignRequest, a cloud-based electronic signature company, and developed Box Sign on its technology. Natively integrated into Box, this new capability reduces business costs for third-party e-signature tools while enhancing team and individual productivity.

Box Sign features include:

■ Ability to send documents for e-signature directly from Box to anyone, including those without a Box account.

■ Secure and compliant signatures since Box Sign inherits Box's security and compliance profile including HIPAA, SOC, ISO, FedRAMP, and more.

■ New Box Sign capabilities in the Box for Salesforce integration, which allow customers to generate and send NDAs, contracts, and more directly from within Salesforce.

Box Sign will be available for Starter plans at no additional cost later this year.

Cortical io enhances Contract Intelligence

Cortical.io has announced the release of Contract Intelligence 4.5, an artificial intelligence software that automatically and accurately searches, extracts, classifies and compares key information from agreements, contracts, and other unstructured documents like policies and financial reports.

It uses Natural Language Understanding (NLU) to analyse relevant information from large quantities of documents quickly and with an accuracy that is difficult to achieve at scale with manual labour or with other contract analysis tools. The latest capabilities include a new extraction service leveraging incremental learning, the ability to handle relations within documents (a key requirement for the insurance industry), enterprise-class access management, and further OCR improvements.

Cortical.io offers the capability to easily customise the extraction and classification to any type of document and to the specific corporate requirements with comparatively little training data.

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

Faster Scans for Dense QR Codes

Dynamsoft has improved the speed and recognition accuracy of its barcode reader software development kit by 20 percent for dense QR codes used in applications like document automation processes, personnel management, and ID cards.

Performance for 1D barcode reading from still images has also been slightly improved. The 1D barcode symbol is the most widely used across a myriad of applications. These dense QR code performance improvements are useful in common applications like document automation and processing. However, they are also ideal for companies that use the barcodes for capturing and maintaining staff contact details or ID cards.

Among other applications, they are used to maintain and update a person's contact details. By updating a database in place of physical assets, the barcodes are always current. So, this avoids the need to reprint physical assets like ID cards or business cards.

Dynamsoft provides its barcode scan SDK for developers to more rapidly and cost-effectively deploy business-critical applications that rely on dependable barcode technology. A trial and demo is available.

Intelligent Document Processing Platform

Ephesoft has released Ephesoft Transact 2020.1.05. The latest version of Transact boasts advanced cloud native, AI-enabled handwriting recognition capabilities and an intuitive table rule builder, enabling organisations to turn handwriting (both print and cursive) and tables into structured data in record time, at high accuracy.

Transact's new handwriting recognition feature builds on the block printing/native Intelligent Character Recognition (ICR) and checkbox extraction tools launched last year, offering a highly reliable yet fast and easy way for users to extract handprint values from documents and automatically detect signature or checkbox filled areas.

The technology reads both printed and cursive writing at an average accuracy of 88% out-of-the-box, even handwritings that are not easily legible by human review. Users can use a scanner, tablet, phone or other means to scan the document or form. The latest Transact release also adds an AI table rule builder for invoice processing, making the extraction of line item details in tables easy to set up, even for non-technical resources. A new guided in-app configuration screen helps administrators identify line item information to extract. Transact then automatically creates the extraction rules and applies them to any subsequent documents submitted by the same vendor.

https://ephesoft.com/

Epson launches SOHO Scanner

To help ease the burden on small businesses, gig workers and consumers, Epson has launched the new RapidReceipt RR-600W fast, easy and smart receipt and document scanning solution.

There is no denying how organising and managing financial information can be overwhelming, especially with the sheer amount of receipts, invoices, expenses, and critical paperwork that most small and home offices accumulate.

It is very easy for documents to pile up, and the arduous task of manually processing each one can be time-consuming and cumbersome. The result is often data-entry errors and the risk of lost data, ultimately costing businesses valuable time and money.

RapidReceipt is specifically designed for organising and managing receipts and invoices. Perfect for small business owners, office managers, road warriors, field-based workers, consultants and gig economy workers who often wear multiple hats and are short on time and resources. RapidReceipt with receipt and invoice management software is a simple, cost-effective and time-saving financial management solution.

The RapidReceipt scanner includes Epson ScanSmart Accounting Edition software, which converts stacks of unorganised receipts and invoices into actionable digital data.

Small business owners and consumers can finally say goodbye to manually entering data because RapidReceipt software accurately extracts and organises data from receipts and invoices, and seamlessly integrates into Excel spreadsheets or third-party applications such as MYOB, XERO, and more. Users can also scan directly to cloud storage services such as Dropbox, Evernote, Google Drive and OneDrive.

The RapidReceipt RR-600W wireless, desktop scanner captures both sides of a document in one pass with speeds as fast as 35 ppm/70 ipm.2

It features a robust 100-page Auto Document Feeder accommodating stacks of paper of varying sizes and includes an intuitive 4.3" touchscreen and convenient USB port so users can scan directly to a USB memory drive without a computer.

The RR-600W also includes a TWAIN driver for easy integration to most document management software and includes Kofax Power PDF for Windows and PDF Converter for Mac to allow users to simply create searchable and editable PDFs, at no extra cost.

With NewSoft Presto! BizCard software included with the RapidReceipt RR-600W, users can easily scan business cards and manage contact information.

Epson scanners deliver intelligent image adjustments with automatic cropping, blank page deletion, background removal, dirt detection, paper skew correction, and staple protection capabilities so users can scan worry-free.

The Epson RapidReceipt RR-600W desktop scanner is available now for an RRP of AUD$699 from Epson Australia by going to: https://www.epson.com.au/rapidreceipt/ and from all authorised Epson resellers.

Exela adds together AI and RPA

Exela Technologies, a business process automation (BPA) vendor, has combined its robotic process automation platform ("EON") with Intelligent Document Processing ("IDP") to expand its offering in AI-enabled automation.

IDP enables the automation of document classification, data extraction and data routing into a cloud or on-premise hosted service portal that provides a containerised, dynamically scaling solution that can be accessed from anywhere on-demand.

Using the IDP system, Exela has begun leveraging an extensive and growing library of machine learning based classifiers that significantly augment the automation of document processing in the healthcare and public sector and has plans to ramp up projects in the finance and legal sectors soon.

The IDP solution includes a modernised data entry solution that delivers rule-based, character-level data correction capabilities that dramatically reduces the keystrokes needed to meet customer service level targets.

The IDP manual entry solution enables Exela to leverage manual entry operators working from anywhere while preserving data security using a proprietary snippet routing engine.

In addition, EON can automate simple or complex workflows to achieve efficiency and accuracy gains, as well as free up human capital for higher-value uses.

EON provides automation for both attended and unattended automation deployments.

https://www.exelatech.com/

Intelligent Search for Microsoft Teams

Sinequa has announced the ability for organisations to access Sinequa's Intelligent Search platform from within Teams.

The Sinequa platform offers a single access point to surface relevant insights both from within and outside the Microsoft ecosystem.

Data within the enterprise is largely unstructured content. This content is often lengthy and diverse, stored in different versions and often many formats. The Sinequa platform ingests, analyses, and learns from data and content, while allowing employees to use natural language to surface it quickly.

Not all content is created equal, and every job has a very different workflow. With a 360-degree view of any topic - such as customers, products, issues, processes, and much more -employees have everything they need to make informed decisions. An advanced analytics dashboard helps provide this complete view by cross-analysing and connecting content from diverse sources.

https://www.sinequa.com/product-enterprise-search/sinequa-for-teams/

Foxit adds Advanced PDF Collaboration

Foxit has announced the launch of Foxit PDF SDK 8.0, delivering new advanced collaboration and accessibility features for developers. The PDF SDK is aimed at helping software developers in any industry to build apps with robust PDF functionality by leveraging the most popular development languages and frameworks.

Advanced collaboration capabilities have been added that synchronize annotations and page manipulation among multiple instances of the PDF viewer in your browser. The new version has also made it easier to deploy the SDK in a developer's own application and manage realtime access for any user.

Developers will also be able to control access and permissions of PDFs and disable functionality and toolbar buttons in the latest version. PDF SDK 8.0 also includes brand new accessibility features including high contrast support and a text-to-speech tool. Advanced form functionality has been incorporated - including additional form field option controls, widgets, advanced forms, and XFA support.

https://developers.foxit.com/

Automated charts with DITO 2.1

The launch of DITO Version 2.1 by iText adds the ability to create automated charts and graphs in DITO templates, have more control over conditional content in templates, and more.

Currently charts in both line and bar formats are supported. Chart configuration is simple, just click the chart button to add a chart, and complete a three-stage process where you choose the type of chart, select the data array the chart will use, the label and value fields, and the chart properties.

You can configure the colours and thickness of the bars or lines, and whether to display the axis labels. You can also configure the chart size, and since they are created as SVG images they can be scaled to any size without suffering from any degradation.

Composition templates are templates constructed from separate template fragments, such as headers and footers. You can now set conditions for inserting templates into compositions using either a wizard or syntax mode. In wizard mode you can choose a field to use for your condition and configure how to use it. In syntax mode you can type your condition in an input box, with helpers to insert fields and operators, and the syntax is validated as you type.

The fields you can use in the condition expression are those of the data collection associated with the composition. The field selector (both in wizard and syntax mode) shows the field names and the field values of the data collections default sample.

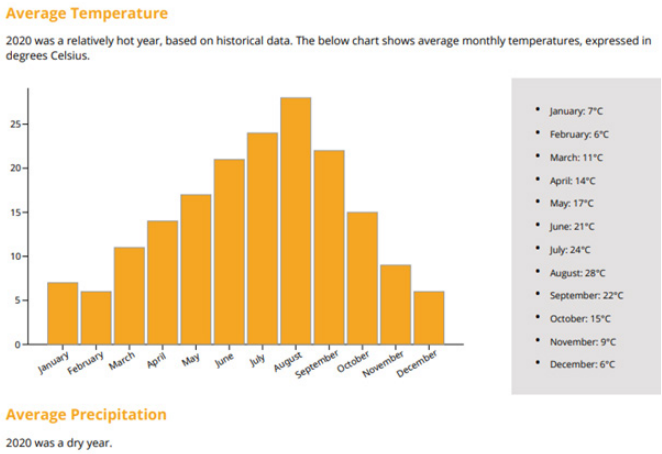
At runtime, templates with conditions will be evaluated. If the condition returns true, the content of the conditional template is shown in the PDF. If it returns false, the template content is not inserted, and the rest of the document reflows accordingly. Composition templates that don't have an insert condition will always be inserted.

When DITO 2.0 was released in March, iText announced it planned to deprecate the native Java PDF production SDK/API, with the final supported version being 1.5. This was due to the REST SDK/API offering more flexibility in terms of development and deployment.

However, due to popular demand iText has decided to continue to support it going forward, albeit with some caveats. Using the Java SDK/API means that you opt out of iText DITO Manager's promotion capabilities and you will need to manage the deployment of templates to your different SDK/API instances manually (the 1.x way).

Other new features of DITO 2.1 include like importing and exporting legacy templates, and an advanced list component for templates. For a fully-detailed rundown of what's new in the v. 2.1 release of iText DITO, you can download the Release Preview Guide. If you just want the short version, you can check out the release notes instead.

A free 30-day online trial is available.



An example chart created with iText DITO 2.1

iText DITO now in AWS Marketplace

iText's template-based PDF generator, iText DITO, is now available in AWS Marketplace. iText chose to make iText DITO available on AWS because it offers a simple, scalable way to deploy iText DITO SDK and close integration with other tools on its platform.

AWS Marketplace is a digital catalogue with thousands of software listings from independent software vendors that make it easy to find, test, buy, and deploy software that runs on Amazon Web Services (AWS).

"Being listed in AWS Marketplace offers more developers easier access to our feature-rich and well documented PDF technology, starting first with our latest product iText DITO," said Gary Fry, CEO, iText.

iText is currently working on a streamlined way for its customers to deploy the iText DITO REST SDK/API component on either the Amazon Elastic Container Service (ECS) or the Amazon Elastic Kubernetes Service (EKS).

That will ensure that the orchestration and management of PDF generation clusters can be made with ease, and with the confidence that they will never skip a beat.

iText DITO is immediately available in AWS Marketplace. To find iText DITO SDK/API in AWS Marketplace, go here.

iText adds Office PDF conversion

iText Software has announced the launch of a new product for their iText 7 PDF library, pdfOffice. The latest product was developed to provide best-in-class conversion of Office documents, without the need for costly licensing subscriptions and conversion expenses.

Over 500 billion Office documents are created every year across multiple industries, yet they have significant drawbacks when it comes to use cases such as distribution, information governance and data security policies, or archiving.

The PDF format does not have these challenges, and is, therefore, a much used format in most organization's digital workflows and applications.

Unlike some competing solutions, everything in pdfOffice is handled natively and without relying on external software to perform conversion.

As such, the pdfOffice add-on, in conjunction with a valid license, is all that's needed to enable high-fidelity conversion of a wide range of document formats.

This translates to accurate representations of Office documents viewed on any device or application, with no additional requirements.

Through its wide language and font support, pdfOffice has built-in emulation of over 700 fonts across 45 languages, ensuring great text rendering, worldwide compatibility and avoids font licensing costs. The solution is memory-efficient and ideal for use in embedded environments.

https://itextpdf.com/en/products/itext-7/convert-ms-office-to-pdf-pdfoffice

APPS & APPLIANCES

A singular approach to Medical Imaging

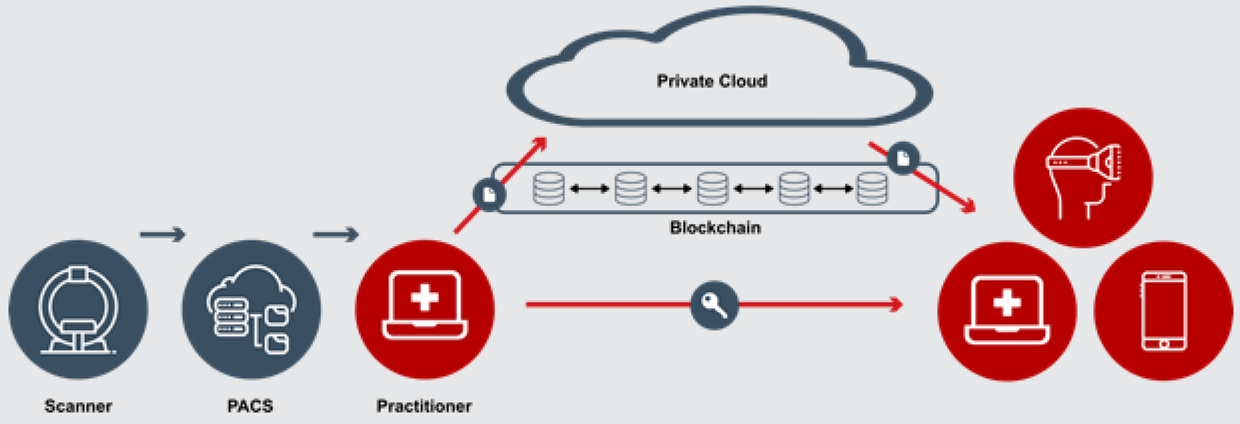


Figure 1: MFTP Process – Data transferred to secure private cloud for limited time and secure key/token shared to recipient. Distributed ledger records transaction of files and authenticates the recipient prior to allowing transfer.

WA's Singular Health Group has released the first publicly available version of its Medical File Transfer Protocol (MFTP), as part of the 3Dicom v2.5.0 software release.

MFTP provides radiologists, medical practitioners and patients with the ability to retrieve a raw DICOM file from existing servers and securely share the actual DICOM file between different devices and entities for better information flows.

With more than 80% of patients expressing an interest in viewing their own medical scans, and current patient portals and radiological reports only displaying key images or 2D views, MFTP will deliver 3D patient-specific visualisation direct to patient's personal computers.

The transfer of patient data is highly complex, and the Company has made several technical breakthroughs both in file compression and creating scalable, immutable audit trails for enterprise and patient-to-patient transfers.

File compression is key to enabling MFTP as the initial medical image files can be a few hundred MBs and larger file sizes directly relates to higher costs for transfer and storage, and the need for high-speed, high-bandwidth internet which limits global deployment.

Through numerous methods, Singular Health's team has been able to compress raw DICOM files by up to 85% whilst still retaining the original quality and metadata. This allows for MFTP to be used with lower speed networks and enables low-cost storage. The compression happens on the device itself prior to sharing the file which reduces time to upload/download.

Relating to file storage, Singular Health is utilising private cloud infrastructure with dedicated in-country data centres where possible to ensure in-country storage and best-practice for global file transfer when sending scans between countries through encryption and multi- factor authentication.

Recording who is sharing and receiving medical files, and why the file has been shared is essential to ensuring patient confidentiality and the legal usage of medical imaging. MFTP uses private blockchain infrastructure to record a distributed, immutable ledger of all 'transactions' whilst preserving the anonymity of users. This allows for a distributed ledger that can used for audits of certain users whilst preserving the anonymity of all others.

MFTP is critical to Scan to Surgery, acting as the backbone infrastructure upon which all the scans, design files and surgical notes for a patient-specific surgical approach are shared and tracked along the vertically integrated Scan to Surgery process.

https://singular.health/

Secure Scanning from Kodak Alaris

Kodak Alaris has announced the release of its INfuse Expansion Modules, including six new software add-ons and support for a third-party card reader accessory that allows users to scan documents more securely and efficiently than before. Partners such as ISVs and Systems Integrators can now customize their core INfuse offering by adding one or more of these modules to their solutions.

The INfuse Solution integrates into other applications allowing users to complete tasks more accurately and faster than ever before. Tasks previously completed in days are now measured in minutes or hours.

INfuse includes three key components: the partner's software application, INfuse Management Software, and the INfuse AX Scanner. Partners create efficient, networked document solutions such as invoice processing, medical records management, or customer account management by integrating the INfuse solution into their line of business applications through the use of APIs and plug-in modules.

Improve Your Document Security

INfuse provides enterprise-level security, including a separate data path, control path, and authentication path, to isolate confidential content for secure transmission. As part of the INfuse expansion, new authenticator modules for added security include: the LDAP Authentication Module, the PaperCut Authentication Module, and the ability to develop custom authentication modules for partners.

All of the modules provide credentialled information from the scanner directly into a customer's authentication system.

Customers benefit from having a single authentication authority, providing more efficiency and better control over document chain of custody.

New Card Reader

Kodak Alaris now supports secure access to INfuse AX Scanners using a third-party card reader. The HID OMNIKEY Smart Card Reader is a cost-effective way for organizations to leverage their existing user ID system to improve security while providing a user-friendly experience.

For example, employees at a bank needing to process invoices can simply walk up to the INfuse AX Scanner, swipe their employee badge, and scan the invoices.

Leveraging the existing credentials already used by employees and IT departments means little training is needed. Organizations can feel confident that their scanning solution is secure and an extension of their trusted authentication solution.

In addition to the existing standard and partner customized connectors, four new Direct-to-destination Connector Modules are available to optimize data channel efficiency to major cloud destinations.

These Connector Modules allow the scanner to scan directly to Microsoft Azure Blob storage, Amazon S3 storage, Alibaba OSS storage, or Tencent COS storage without passing through intermediate destinations. This improves security while simultaneously eliminating costs, delays, and maintenance complexities.

The Kodak Alaris subscription licensing model now offers the new INfuse Expansion Modules, allowing partners the flexibility to configure the right solution for each customer.

Industry Recognition and Use Cases

The INfuse Smart Connected Scanning Solution has received several industry accolades, including Buyers Lab's Outstanding Achievement in Innovation Award. Meanwhile, the list of use cases from around the world continues to grow.

Here are a few ways that INfuse makes business processes faster and more efficient:

- Invoice Processing workflows have an easy on-ramp to move receipts, invoices, and other documents directly into these systems.
- HR records can be securely and efficiently filed with peace of mind, as users receive real-time acknowledgement when a document is sent and received.
- Medical records can be sent and instantly received because the INfuse Solution is compact enough to be placed at the nursing station.
- Logistics Companies that have a variety of depots can place INfuse in each location for workers to send proof of delivery (POD) documents and other shipping notices.

For more information, visit the Kodak Alaris website.

Smartphone evidence acquisition tool

MSAB has announced the launch of Raven, an innovative solution for immediate digital evidence acquisition and analysis at scene level via smartphone app. Raven is a highly portable mobile device extraction toolset. It is specifically designed for operators in the field who need lightweight solutions to quickly extract data and turn it into actionable intelligence.

Raven is a collection of applications (apps) that run on Android OS devices including mobile phones and tablets. Built on top of the latest Android operating system as a collection of applications and compatible hardware, Raven allows a user to take advantage of a standard Android device's capabilities and enhance them with advanced forensic data collection capabilities, simply by downloading all or selected Raven apps.

The Raven app suite consists of: MobEX (mobile device extraction); SIMEX (SIM card extraction); FlashEX (Flash media extraction); and DronEX (Drone device extraction). Plus, the ODIN analysis app allows users to quickly view the extracted results, check watch lists, find the most recent location

MSAB Raven is available today to qualified law enforcement and defence agencies. For more information, visit msab.com/raven

Network connector for USB scanners

On the heels of launching its Visioneer VAST Network technology, Visioneer has announced Visioneer Network Scan Service, allowing users to share PC-connected scanners to the network. Existing or new scanners can be made visible and accessible to network users, without compromising document security. Once the scanner is visible on the network, other users can connect and capture documents with Visioneer OneTouch and Capture SE software – or TWAIN Direct applications - from their PC. By "up-converting" existing scanner technology, all supported Xerox and Visioneer scanners can be used as network devices, capable of supporting multiple users in office and remote locations.

Visioneer VAST Network consists of several software components, and is an extended implementation of TWAIN Direct, an open-source, zero footprint image acquisition protocol to drive secure network scanning devices via web-based or local network client applications, removing the requirement for a PC-based local driver.

Further, with Visioneer VAST Network, each USB-connected scanner on the network becomes a smart device users can share, use a mobile device to scan and acquire images from the scanner, scan remotely, plus remote and central management of scanner fleets.

http://www.visioneer.com/VAST

Newgen enhances Classification

Newgen Software has announced the launch of Intelligent Document Classifier (IDC) 2.0, an upgraded version of its content classification and categorisation software.

The latest version of the software uses a python-based web API that takes a document as an input and applies deep learning algorithms to classify the different pages of that document.

The classification can be solely done based on the structural features, the textual features, the layout of the document, or by using any combination of these three models.

Features of IDC 2.0 include:

- New Model for Object-based Classification: Identifies target objects in the target image and determines the category of structured documents
- Better Accuracy with Image- and Content-based Classification Models: Facilitates improved accuracy in both models. Image-based classification model provides upgrades of existing libraries to the latest versions and has added an advanced verification model for further improving accuracy. Content-based classification model performs analysis on headings and custom keywords in documents for more effective classification
- Configurable Smart Model: Introduces a configurable model for flexible processing whereby model chaining (i.e., sequencing multiple models) and result aggregation (i.e., tweaking of each result model to achieve a final result) can be configured
- Technical Enhancements: Facilitates effective management of admin module with CherryPy 18.6 server and extended product support for XML

www.newgensoft.com

Nitro adds Salesforce e-Signatures

Nitro Software has announced the launch of Nitro Sign as a standalone subscription product as part of a new pricing and packaging model for the Nitro Productivity Platform.

New Nitro Sign integration with Salesforce enables customers to accelerate closing of sales contracts and other critical agreements.

Nitro Sign and Nitro PDF Pro already integrate with other key systems used by organisations every day, including Zapier, Power Automate, SharePoint and cloud providers Box, Dropbox and Microsoft OneDrive.

On 12 July 2021, Nitro announced the completion of the acquisition of PDFpen, which adds native Mac, iPad and iPhone capabilities to the Nitro Productivity Platform.

https://www.gonitro.com/

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