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DECEMBER-JANUARY 2021



OFFICE365
RECORDS
MANAGEMENT
LIMITATIONS

3

COMMON PROCESS
AUTOMATION
MISTAKES
(AND HOW TO
FIX THEM)



Digital transformation fails: Are you automating the wrong processes?

What's in store for the world of Intelligent Automation in 2022?

Why a one size fits all approach to data classification won't deliver

**National Archives'
\$A67M Digitisation
Push**

**Breaking the
shackles of
history**

**How to identify
MS Teams
sprawl**

Microsoft and Objective team up for the hybrid workplace

Microsoft and Objective Corporation have signed an agreement to work together, helping government and regulated industries to balance the flexibility of digital communication and collaboration with compliant information management and robust data governance.

Over the last 18 months, there has been a rapid move to hybrid work - decoupling work from physical workplaces. Microsoft and Objective will work together to ensure that information shared in hybrid digital environments is subject to the same rigorous control as it would be in a physical office.

End users will work in familiar Microsoft applications, with Objective Content Solutions controlling the way information and documents are shared, stored and secured. This allows them to remain compliant with record-keeping and reporting requirements and regulations. This is particularly critical for public sector and highly regulated industries - especially as they accelerate their adoption of hybrid ways of working.

Objective's suite of content solutions, developed specifically for the public sector and regulated industries, integrates with Microsoft 365 to preserve robust information governance across networks of any scale. Organisations can leverage their existing Microsoft investments while reigning in the risk of information being shared without proper controls. Objective's suite of content solutions is available on Microsoft Azure.

For example, Objective Governance for Microsoft Teams meets the unique needs of balancing modern collaborative working with regulatory compliance. Objective GOV365 delivers organisational benefits of information governance with minimal user impact.

According to Deanna Fleming, formerly Digital Workspace Manager at South Australia's Department of Primary Industries and Regions (PIRSA); "It hit all the marks. It made it so Microsoft Teams owners had control over what they bring under Objective's

governance. It's done so simply and so easy that you wouldn't even know that it's being done."

Now, Records and Information Manager at Department of Treasury and Finance in South Australia, Deanna is leading another project with Objective and Microsoft 365.

The new Memorandum of Understanding between Microsoft ANZ and Objective Corporation sees the companies support one another's and shared customers to ensure effective -Teams governance; - email governance; - SharePoint governance; and co-authoring with proper version, history and security controls.

Tony Walls, CEO at Objective Corporation said; "This MoU formalised the strong relationship we have developed with Microsoft over many years. Together, we help customers balance collaboration with robust information governance.

"Microsoft 365 has been deployed widely throughout government and regulated industries and plays a critical role in enabling everyone to work more effectively; creating documents and collaborating easily; all necessary elements of the way we work today.

"Without Objective's technology, preserving the trail of communication, decisions and documents to the level required by government, would be near impossible.

"Put simply, given the requirements of our customers, Microsoft and Objective are better together."

Mark Leigh, General Manager, Public Sector, Microsoft ANZ said; "Objective is a valued member of the Microsoft ecosystem with a rich collection of governance-focussed software that reins in risk without impeding the productivity of customers.

Objective and Microsoft have released a [joint paper](#) discussing the conundrum organisations face enabling easy collaboration for their staff while ensuring appropriate governance is applied.

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Micro Image joins in National Archives' \$A67M Digitisation Push

The National Archives of Australia has announced Melbourne scanning bureau Micro Image as the winner of a tender to deliver an integrated document scanning facility over the next two years as part of the NAA's new industrial scale digitisation hub in Canberra.

Under the partnership Micro Image, based at the new digitisation hub in the National Archives' repository on Sandford Street in the Canberra suburb of Mitchell, will undertake large-scale digitisation of at-risk items from the national archival collection.

Micro Image will commence operating from the National Archives' secure onsite hub in early 2022 and will supply all digitisation equipment and staff.

In July this year the Australian Government announced an extra \$A67.7 million over four years to fund the National Archives' Defend the Past, Protect the Future Program. This Program will see the digital preservation of critical at-risk collection material, including audio-visual content, before Deadline 2025.

Over four years, more than \$A45m of the \$A67.7m will be allocated to the task of digitising collection items and preserving them in a next generation digital archive, safeguarding the most at-risk items and improving online access to the national archival collection (approximately \$A25m on digitisation and \$A20m on the next generation digital archive).

The NAA says the new digitisation hub will also enable it to significantly upscale its proactive digitisation capacity, ensuring more of the collection is digitally preserved and available online, for use by government and the community. NAA staff will identify, prioritise and prepare records for transfer to and digitisation by Micro Image in the Digitisation Hub at the Sandford Street facility.

"Micro Image will undertake further preparation as required and agreed, before digitising and quality checking the final image. Both the image and the records will then be returned to National Archives custody where staff will undertake final quality assurance checks before loading the digital image to the collection database RecordSearch, where it will be accessible to the Australian public.

"Micro Image may on occasion also undertake metadata extraction on records, deploying their technology and expertise to increase the efficiency of this process. Micro Image will equip the digitisation hub with a variety of technology, along with trained staff, that will enable them to respond to a variety of different record formats and sizes.

"This builds on National Archives' existing approach to best use of in-house and external provider capability.

Hosting the Digitisation Hub and increased digitisation capability on-site, will deliver time and cost efficiencies, as well as improved secure handling and preservation management of collection items during the digitisation processes."

"We are very pleased to be partnering with Micro Image to launch this new capability. Use of commercial providers, in conjunction with our inhouse digitisation team, is a cost-effective and time-efficient way of digitising large amounts of the national archival collection. This will result in more records being preserved, digitised and made available online to all Australians, regardless of where they live," said David Fricker, Director-General, National Archives of Australia.

Another approach to market (ATM) is underway to establish a service panel for the digitisation of photographic formats (including photographic negatives, prints, microforms and aerial film).

Through the Outsourcing Digitisation Services for Audiovisual Formats Panel (SON3682659), arrangements are underway with providers to digitise magnetic tapes prior to Deadline 2025.

The National Archives is also currently partnering with several providers, including FujiFilm, W&F Pascoe and Datacom IT on other large-scale paper digitisation

projects, including Bonegilla Migrant Registration Cards and the \$A10m 4-year WWII Military Service records project.

According to a report in the Sydney Morning Herald, Australia's intelligence community has conceded it is breaching laws governing

how some of the nation's most important historical documents are stored, revealing more than 10 kilometres of classified documents are gathering dust and may never be made public.

The foreign affairs department revealed it has one million hard-copy files, the majority of which are classified, stored on more than 10 kilometres of shelves in Canberra, state capitals and in overseas embassies. The storage costs in Canberra alone are \$A230,000 a year.

The department believes it will "never be resourced sufficiently" to review these archives so that they can be publicly released. There are another 24 kilometres of Foreign Affairs records held by the National Archives, many of questionable value.

The Office of the Attorney General has more than 85,000 archive boxes containing paper records held across Australia, as revealed in a recent tender issued by the OAG which is seeking to replace its current provider of document archiving and retrieval services



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How advanced AI tools can improve compliance

By Paul Maker

In many ways, compliance is the cost of doing business. It doesn't generate revenue, but it is an essential part of operating effectively as a business today. Whether it's industry specific regulations, or the standout regulation of our time - GDPR - we are all acutely aware of the damage, both reputational and financial, that non-compliance can cause.

GDPR has equipped employees across industries with an appreciation of the context, usage, and security of data, but there is another factor that is essential for establishing an effective data strategy, which is data discoverability. To ensure regulatory compliance, data must not only be secure, it must also be discoverable so that compliance personnel can locate all information needed to prove compliance.

Increasingly, AI tools are being harnessed to automate workflows and governance, but such capabilities can only be delivered when a strong data foundation is in place.

What's in a label?

The key risks when it comes to compliance lie in exposing or sharing the wrong information, or failing to produce the desired information when required by auditors. To minimise these risks, it is essential that all information within an organisation's systems is made discoverable and delivered in a user-friendly format.

One of the first steps to enabling this is the process of data classification. For example, invoices contain sensitive financial information so are a prime example of documents that require strict governance protocols, such as those around access and shareability. These rules can, of course, be applied on an ad-hoc basis, but this is an extremely inefficient model and prone to human error.

A much more robust model is a system that inherently understands which documents are sensitive and automatically applies governance rules to them. In short, a system must understand the classification of each data asset to understand its risk profile—and it's here where AI tools can deliver truly transformative value for organisations.

Through the use of classification machine learning models, a data asset that is of regulatory significance can be surfaced and automatically made compliant for its entire lifecycle. While this will require some pre-labelling work, in which sensitive assets are manually labelled - or automatically labelled through clustering models - to train the classification model, the long-term benefits for organisation are clear. One only needs to consider the time cost of the average data subject access request (DSAR), which can be anywhere between £3,000 and £6,000 to realise the efficiency and cost-reduction dividends of more advanced data discovery.

Uncover hidden risks

Classification algorithms are a great way to automate compliance rules for data and information across an organisation. Put simply, if a document looks like an invoice, it will be classified as one with a high degree of accuracy. But if a regulator requires multiple documents relating to a specific asset be collated, classification will only get you so far.

For example, within asset heavy organisations, every single site will often have a number of documents that will be needed to ensure compliance, such as maintenance history reports and schematic diagrams. To ensure that each asset is compliant, companies must be able to surface all the relevant documentation, but doing so with ease for potentially hundreds of assets presents a significant logistical problem.

Building on the work of the classification models, named-entity recognition can be used with machine learning models to search and discover all documents that contain a specific asset code, bringing unstructured data into the compliance automation process.

Know the rules

Of course, before embarking on any machine learning project, it is essential that compliance requirements are fully understood. It's easy enough to make a model that will search for asset codes, but when there are specific regulatory nuances to consider, subject matter experts must be consulted for each area of compliance.

One compliance model will look very different to another when it relates to an entirely separate regulatory framework. Water companies, for example, must ensure compliance with specific regulations and manufacturers must comply with a multitude of ISO standards for their products. Organisations may also have their own compliance policies that relate to business best practices or mission statements around the usage of data.

In each case, an initial discovery phase involving those most familiar with specific regulatory frameworks is crucial. This ensures data science teams are able to translate their knowledge into rules that result in high-performing models for compliance.

The path to deeper insights

For every file sitting in a records management system, there will likely be data that relates to it within multiple databases. The ability to understand the link between each relevant piece of information across an organisation is not only useful from a compliance point of view, its essential for gaining a holistic view of your data universe.

This is where AI tools provide significant value for employees, as they make information discovery and deeper insights into that information seamless.

Reducing the cognitive load on users and improving employee experience is a key driver behind the uptake of AI tools and automation today. This is why the automation of governance is increasingly a valuable pay-off for organisations implementing more advanced data strategies, as employees no longer have to capture multiple datapoints for the sake of compliance as they go about their daily tasks.

The ultimate goal of any AI strategy, particularly when it comes to compliance, is to not only automate discovery and reporting, but to automate processes, compliance or otherwise, when new information is introduced to a system. To enable this model, advance your data strategy in line with the above recommendations and set yourself on a new path of data discovery.

Paul Maker is Chief Technology Officer, Aiimi. The Aiimi Insight Engine uses AI and machine learning to intuitively discover, enrich, and classify all information.

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regulators about the importance of information security right along these chains.

Many organisations lack full visibility across the information they hold, as well as the potential value and risk it presents, says Nigel Carruthers-Taylor – executive director and principal of information management and governance specialists, iCognition.

“One common misconception is that information management is purely a checkbox compliance issue, but this fails to recognise the value it offers to the business,” Carruthers-Taylor says.

Organisations hold a wealth of valuable information that can drive the business, improving efficiency and creating competitive advantage. That value is lost if organisations can’t harness all their information, or they don’t even appreciate the full extent of the information they hold.

Tools like artificial intelligence and machine learning can help organisations uncover the true extent of the information they hold and make the most of it.

A better understanding of their information also allows them to take a smarter approach to compliance issues such as privacy, Carruthers-Taylor says. “

Usually, organisations don’t know what they’ve got hidden away in multiple network drives, SharePoint sites and Google Workspaces,” he says. “This makes it difficult to take the correct compliance posture on that information.

“It also makes it difficult to comply with the next generation of regulatory requirements, such as the ability to delete customer information – and produce evidence to support this – under ‘right to be forgotten’ laws.”

Smarter information management tools let organisations take an intelligent, nuanced approach to access management, based on principle and policy rather than simply hard perimeters.

Enforcing simplistic hard and fast security rules on information access can limit how that information is leveraged to assist the business. This risks creating a “dumb organisation”, Carruthers-Taylor says.

A more nuanced approach, based on principles and policy supported by smart technology, offers a more effective defence strategy than solely relying on a hard perimeter.

Implementing a solid set of policies and robust audit capability adds extra layers of defence, while ensuring that appropriate people can access information for appropriate business purposes, to create value.



“One common misconception is that information management is purely a checkbox compliance issue, but this fails to recognise the value it offers to the business,” Nigel Carruthers-Taylor – iCognition

It’s a mistake to view information management as simply the equivalent of a security guard posted at the front desk, who ensures compliance in a heavy-handed manner while often getting in the way, Carruthers-Taylor says.

“A great information management system is much more than just a security guard, it’s more like a concierge who also understands context, adds value and is there to help the organisation rather than blindly enforcing the rules,” he says. “

This kind of technology was once restricted to the big end of town, in terms of the barriers to entry and the drivers for adoption, but this is changing and allowing more organisations to fully unlock the power and value of their information.”

Harnessing Smart Tools to Unlock Value

In the rush to provide remote workers with collaboration tools during COVID-19 lockdowns, Australian organisations struggled to strike the right balance when sharing and securing their information.

While embracing new business tools in the scramble to keep workers productive, many organisations either made information access overly restrictive or introduced significant business risk as they inadvertently lost control over their important information, seeing it scattered across a range of systems.

Scattering information throughout the business has a significant impact on productivity. Even before the pandemic, employees spent an average of 1.8 hours every day searching for and gathering information, according to McKinsey.

While making access overly restrictive during the pandemic resulted in reduced productivity, the loss of control was worse, allowing sensitive information to become exposed. This created cyber security vulnerabilities along with compliance and governance risks.

Amid growing concern about cyber security and privacy, the demands of compliance and governance are

extending to a much broader range of organisations – in sectors from pharmaceutical, research and education to finance and not-for-profit.

A fundamental principle of information governance and compliance is the ability to produce evidence of the provenance, access and use of information. The core of this is records management – a capability that suffers when organisations struggle to effectively manage information across their enterprises.

Records management has evolved substantially in the past 20 years. In many sectors, the focus has shifted from hybrid physical/digital management to primarily digital, bringing with it a new set of challenges. Yet the need to manage legacy hard copies remains in some areas, such as legal environments.

Along with changing the way they manage records, organisations have also changed the way they evaluate business risk. Today, information-related risk management must take into account reputational damage, which can potentially have a significant impact on stakeholder trust.

There is also a growing appreciation of risk throughout the supply chain and value chain, reflected in much more explicit statements from government and

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The background is a vibrant, stylized illustration of an office environment. It features various elements such as a printer, a yellow folder, a person's hand pointing at a document, a person's hand holding a smartphone, a stack of papers, a pencil, and a person's hand pointing at a document. The overall color palette is bright and professional, with teal, yellow, and grey tones.

Microsoft Office 365 Limitations for compliant records management

By Rachael Greaves, CIP, CISA, CISM, CDPSE.
CEO and cofounder of Castlepoint Systems

Office 365 is a ubiquitous and incredibly useful information collaboration platform, and Microsoft continues to evolve the service to meet governance, compliance, and regulatory requirements across the globe. However, there are some key shortcomings in the Office 365 functionality for continuum records management, which is the model required by the International Standards 15489 and 16175, and by governments in the Commonwealth and beyond.

M365 is still using a fundamentally traditional model for records management, which relies either on users to determine and set retention rules, or on records managers to generate and maintain file plans. The automation capability is limited, and labour intensive to implement and sustain. Items aren't managed for their whole lifecycle, or as part of meaningful aggregations (either within M365, and across the enterprise).

The limitations specifically relate to the following issues:

- Managing at the aggregation level
- Sentencing on creation and continuous review
- User and records manager burden
- The impracticality of AI and automation
- Management of records in other business systems.

(Continued Over)

Office365 RM Limitations

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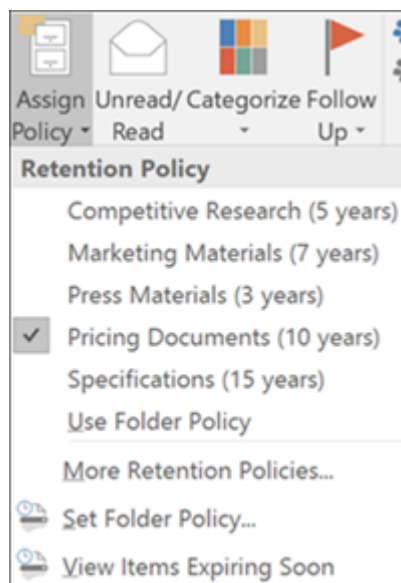
Before exploring each of these challenges in more detail, we need a quick review of how M365 records management works.

The M365 records management approach

In Office 365, Records Management is implemented in two main ways:

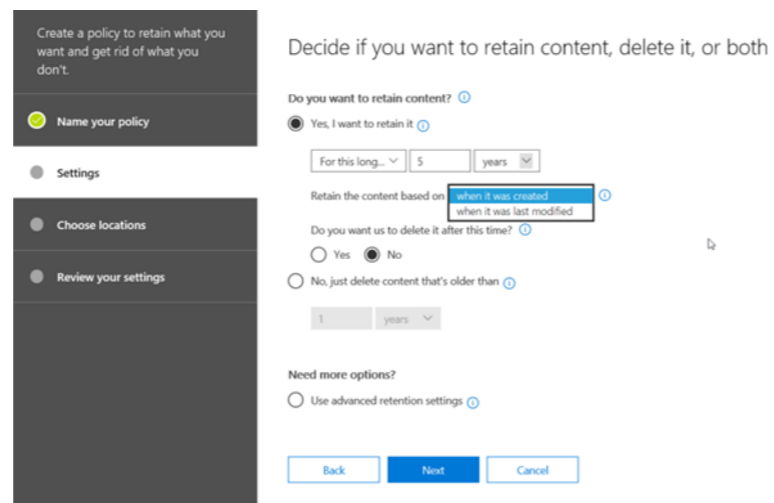
Retention Labels – for individual items

Retention labels are basically metadata and workflow added to a document or item, which set the retention rule for the item. They are designed to be applied to a type of information asset. For example, 'Pricing Documents' might have a 10 year retention.



Retention Policy – for aggregations

In order for items to be managed as part of an aggregation, Office 365 uses a retention policy, rather than a retention label. This applies the same retention settings to all the content in a site or mailbox, for example. You can use labels to override the policy for individual items in the site or mailbox.



This approach of requiring either each item to be linked to its own single retention rule, or for all items in an aggregation to be assigned the same retention rule, has some ramifications for the practical application of compliant records management.

Now let's turn to how these capabilities stack up against the continuum requirements.

Issue 1: Items are managed individually, not as part of an aggregation

A fundamental principle of the International Standards approach to records management is that individual items are not sentenced and disposed of in isolation. The 'meaningful record' is the whole story of something, which often includes many parts. It's all for one and one for all – we keep all the parts of the record until the longest-retention part is ready to be disposed of.

ISO16175-2:2011: Guidelines and Functional Requirements for Records in Electronic Office Environments: The electronic records management system must: Ensure that all records captured within the electronic records management system are associated with at least one aggregation

To see why, let's consider the record of a bridge construction project. We need to keep the final specifications for the bridge for, let's say, 75 years. That's because *if something goes wrong with the bridge*

Importantly, only one retention label can be applied to any one item. So a document can be 'Pricing Documents' (10 years), but not also 'Asbestos Removal' (75 years). So the labels apply based on what an item is, not really on what it is about. In this case, we can mark it as a pricing document, or we can mark it as an asbestos removal document, but not as a pricing document for asbestos removal.

With only one label allowed, this means you can only have one retention rule applied to the document as well.

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at any time during or after construction, we need to know what the specs were. But we also need to know who came up with the specs, and who approved them, and whether they were changed along the way (and whether those changes were approved). Another example might be the funding approvals for [sports facilities](#). We don't just need the final report, we need the history of the decisions.

AS ISO 15489 - 1:2001 (E): Records retention should be managed to meet current and future business needs by retaining the context of the record which will enable future users to judge the authenticity and reliability of records, even in cases where the records systems in which they are retained have been closed or have undergone significant changes

If we gradually chip away at the record by disposing of its individual parts one by one, as their retention in their own right comes due, then we don't have anything meaningful left at the end of the day. We need to be able to re-tell the whole story, for as long as the story is relevant.

This basic principle breaks down with Office 365 **retention labels**. In the M365 model, retention labels are applied to each item, not to the aggregation as a whole. And when the retention comes due for that single item, it is disposed of in isolation. It is removed from its business context, and it leaves the aggregation weaker for its removal.

By the time the last, longest-retention item in that record is ready to be disposed of, or transferred to Archives perhaps, the rest of the story and evidence behind that business decision, event, or activity has already disappeared.

And this doesn't only happen when items are formally disposed of by the records team. In M365, if items are deleted or moved by a *user* before their retention comes due, they are duplicated to a separate preservation or recovery library, completely divorced from their context.

This means when they do come due for disposal, they are disposed of without consideration as to whether they still have continuing value, which is also contrary to the Standards.

ISO16175-2:2011: Guidelines and Functional Requirements for Records in Electronic Office Environments: If more than one disposal authority is associated with an aggregation, the electronic records management system must automatically track all retention periods specified in these disposal authorities, and initiate the disposal process once the last of all these retention dates is reached

And a note on disposition – this can be managed in M365, but the metadata for disposed items is not retained, and the records of disposal are only kept for seven years. Usually, lists of records destroyed are Retain Permanent, and the 15489 and 16175-3 Standards also require that all disposition actions are recorded in a metadata profile.

Issue 2: The sentence is not set or maintained correctly

Using retention labels, we can only apply one type of 'rule' to an item. We can mark it based on what it is (a policy, project plan, marketing document etc.), but we



can't also mark it based on what it is about. In modern sentencing models, we classify records based on what they are about (i.e. how they relate to the functions of the business).

A 'report' about an administrative matter is sentenced one way, and a 'report' about a core business matter is sentenced another. An audit of stationery might be kept for one year, while an audit of safety equipment might be kept for 12 years. They're both audits, but they are about more important or less important things.

The fact that it is an audit goes to the class or activity of the record. What it is about goes to the function. Records authorities usually have rules for each distinct Function/Activity pair.

There are usually dozens, or hundreds, of function/activity rules, in each records authority. Using labels, we would have to present the user with hundreds or even thousands of options for retention for each item they save, which is not feasible.

So if retention labels aren't an appropriate way to accurately sentence records, what about **retention policies**, which can apply at the aggregation (e.g. SharePoint Site) level?

The challenge with this approach is that it requires the administrators (who set the policies) to know what the longest-retention schedule for all the content in the library is expected to be, at the point when the policy is set. This is very similar to a traditional EDRMS model, where the records team (or user) need to predict what the longest-retention content in a whole file is likely to be at its outset.

Sentencing in this way is challenging. Content and context changes over time, especially at a site, library, or mailbox level, which can change daily. And retention rules also change. The gain and loss of business functions changes applicable core business records authorities; GRAs are updated and refreshed; and freezes and holds are introduced by Archives multiple times per year.

The set-and-forget approach has always resulted in records managers being presented with records ostensibly 'due' for disposal that have long-since diverged from their original applied sentence, and that need to be reclassified and resented, often for a longer retention period.

AS ISO 15489 - 1:2001 (E): Disposition authorities that govern the removal of records from operational systems should be applied to records on a systematic and routine basis, in the course of routine business activity. No disposition action should take place without the assurance that the record is no longer required, that no work is outstanding and that no

litigation or investigation is current or pending which would involve relying on the record as evidence.

If we sentence only once, and don't resentence until disposal theoretically comes due, records managers have a lot of work to do to make sure that original sentence is still valid. A better approach is to detect whenever the content or the context of a record changes, and update the sentence then, so that when we are presented with a record for disposal, it is actually due for disposal. This is not possible with either M365 retention labels or retention policies.

And a caveat – the M365 model for marking or declaring something as a Record will make that item immutable, and once the "Record" label is applied, it can't be removed. In the continuum model, we treat our items as records for their whole life, while they are being continually modified.

We don't declare something as a Record only when we are finished with it. So we don't really have a use for the Record label, and can be tripped up by it if we do use it.

Label classification

Use label to classify content as a "Record"

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Next

If content is classified as a record, users won't be able to edit or delete the content or change or remove the label. However, they'll still be able to edit the content's metadata.

Issue 3: Efficiency challenges and limits of automation in O365

Just like traditional EDRMS, M365 creates some overhead for compliance for users and records managers. The work required to classify records is still done by 'people power'.

For **retention labels**, the "correct" sentence has to be selected and applied by each user. But how many labels do we show to our end user? How many is too many? How do we ensure a label gets applied at all? Who checks that the label the user chooses is correct? Can we check every label that is applied to make sure it is appropriate?

Documents change, and so do rules. Who tracks this, and updates the labels to match? It can only realistically be the records team because users don't have enough expertise – so we have now generated two types of manual work.

First, work for the users to apply the labels, and second, work for records managers to check and update them. (And one very important thing to note – changing the label in M365 will automatically change the Last Modified date of the item, affecting its records integrity, and also going against the Standards).

AS ISO 15489 - 1:2001 (E): As well as the content ... the business context in which the record was created, received and used should be apparent in the record (including the business process of which the transaction is part, the date and time of the transaction and the participants in the transaction).

There is some capability to 'pattern match' labels to apply them automatically, based on content type (if selected by the user); matches to sensitive information (again, sensitivity does not usually correlate to records value and can't be used to determine retention in isolation); key phrase matching (each string needs to be defined by the records team for this to work); or fingerprinting, where the

document is a variation on a known template (again, telling us what the document is, but not what it is about).

Retention policies take the item-level work away, and free the users from that burden. However, the records managers now have to pre-determine (and eventually re-evaluate) classifications for each high-level aggregation in the environment.

This is essentially just a traditional 'file plan' system, which has high overhead for governance teams, and can also cause productivity and workflow impacts if, for example, the records team needs to assign the retention policy for every new site that is provisioned before it can actually be used (and note, a single retention policy can only be applied to a maximum of 100 sites, so if you have thousands of sites needing the same policy, you will need to create dozens of duplicate policies).

To be fair, there is always a requirement for records managers to evaluate and potentially update a sentence whenever a record comes due for disposition; this is always a partly manual process.

It needs to be – machines aren't allowed to make discretionary decisions (if they do, we end up with [Robodebt](#)). And there is a good disposition review process built into Office 365, so that the records team can easily review a sentence before actioning it, to ensure it is still correct.

In M365, retention policies can be set from date created (~30% of the rules in an average records authority), date of last action (~50%), or a certain event trigger (such as a user leaving the organisation).

Around 20% of the rules in the average records authority have expiry date triggers, such as a contract being signed, which is more complex than the type of events that can be configured in M365.

Also, as users rarely know what specific retention policy would apply to a contract, for example, or when exactly to apply it, it is unlikely that they will be able to use event-driven triggers effectively, even if they were specific enough.

This means that, in practice, the retention periods for records won't be correct in many cases, and records managers will need to defer those disposal actions for a future date.

Issue 4: The inbuilt Artificial Intelligence and automation is impractical

Office 365 does allow an Administrator to configure automatic or 'default' labels to be applied to items and containers, but again, this can cause problems when assigning the correct label.

This is because records authorities and disposal schedules often have hundreds of different Function/Activity pairs to apply, each with separate types of sub-rule. AFDA Express v2 for Federal government administrative records, for example, has been significantly streamlined, but there are still 86 function/activity pairs, and 257 subclasses within those classes. And that's just one of many Authorities that would be applicable to an agency.

Allowing users to assign a 'default' rule to all content in an aggregation increases the likelihood that the sentence won't be correct.

One item could be added to an aggregation that changes the retention requirement of the whole record, and when we allow defaults to be inherited without any appraisal we don't account for that likelihood.

(Continued Over)

Office365 RM Limitations

(From Previous Page)

Alternately, building a set of queries and models to automate the application of these labels is extremely time consuming, and results in a large and complex “rules engine” to maintain the labels and the circumstances in which they apply.

Complexity of the rules and algorithms can obfuscate the justification behind the application of a sentence by the machine, affecting ethical principles requiring that machine decisions are explainable, transparent, and auditable.

One other risk with automation in M365 retention is that auto-applied labels **can't be overridden automatically**, making it very hard to keep the retention schedule aligned with the actual content of the record as it changes over time.

As another alternative, Microsoft provide some Machine Learning tools. However, these still require the organisation to supply up to 10,000 curated documents per rule to train the automation.

As we have seen, just one records authority can have around 250 rules, which can make any project to establish automation (and the ongoing cost to add new rules) extremely expensive and intensive.

Issue 5: A limited solution – managing records in other systems

Even if we do choose to use M365 in the same way as a traditional EDRMS, with users selecting classifications for each item, records teams managing file plans for each library, and records being sentenced and disposed of outside their business context, potentially using out-of-date rules, we still won't have achieved compliant continuum management against the Standards.

That is because O365 records management is a point solution – it only works on documents and emails in the O365 cloud.

But under the Standards, and for good governance overall, we need to manage all parts of a record in context.

We cannot just manage the documents about the project that happen to be in SharePoint Online – we also need to relate them to the project invoices in the on-premises finance system, the historical information about the project in the file shares, and the project specialist outputs in other line-of-business systems, for example.

Because of the aggregation rule, the whole ‘meaningful record’ has to be sentenced and disposed of as a unit. Knowing the retention policy for a single document does not tell you how long it needs to be kept – you can only know how long to keep each item if you know how long to keep every item.

When we sentence content, it has to be across systems and formats, so that the whole record is included.

To Recap

Office 365, particularly the E5 license version, has many powerful and practical capabilities. The recent focus on records management as a fundamental part of the solution is very welcome.

However, Microsoft is a US company, which is a jurisdiction that tends towards a ‘life cycle’ model of records management rather than a continuum one, and the solution is designed to support that



approach. For those of us who are obligated to apply a continuum model, it's important to understand the limitations against the requirements of the International Standards.

In summary:

- With O365 you can only apply one label, but records will map to multiple retention rules
- Manual application of retention labels places a significant burden onto (unskilled) users
- Application of bulk policies requires a complex file plan which records teams must maintain
- Use of Machine Learning classifiers for rules requires 10,000 curated examples per rule
- Retention rules need to be updated as the record changes, but are set-and-forget in O365
- O365 will only manage its own cloud content, but the ‘record’ may span multiple systems.

This means that records continuum organisations don't have a compliant solution yet in M365. Fundamentally, the model is essentially a traditional EDRMS one, with the user and governance impacts that come with it.

And it also does not manage records in their business context, for their lifecycle, as required by the Standards. M365 is a fantastic platform for creating and using business information, but not a suitable system to records-manage it.

Rachael Greaves is a records and information management thought leader, who designed the Castlepoint command and control product. She has consulted on large-scale records, security and audit projects in government and regulated industries with complex integrated environments and developed Castlepoint in response to the tension

seen in organisations between compliance, usability, sustainability and cost. Rachael is a Certified Information Professional (CIP), Certified Information Systems Auditor (CISA), Certified Information Security Manager (CISM), Certified Data Privacy Systems Engineer (CDPSE), and is certified in project, change, and records management. With a cultural anthropology and linguistics background, Rachael brings ethical, global and sustainable practices to the sector and her mission is to improve outcomes for citizens and stakeholders by helping governments and organisations provide better, more accountable services.



The Promise of the Modern Workplace is more than just converting paper into digital files

By Ron Cameron, KnowledgeLake

COVID-19 has forced many companies to change the way they capture, process, and manage documents, as it has with so many other areas of getting things done. Organisations that previously got by using outdated and clunky, but comfortable, manual processes have had to increase their use of digital solutions dramatically.

Leading consulting firm McKinsey said, “we have vaulted five years forward in consumer and business digital adoption in a matter of around eight weeks.”

But what does that mean for good old capture?

According to a study by Ardent Partners, 2020 was the first year in history where more invoices were submitted and processed electronically (50.3%) versus manually (49.7%). In addition, more workers are now getting paid digitally (55%) than via paper checks (45%).

Neither of these statistics allows us to conclude that paper is gone, but they are indicators that we are moving faster and faster to a truly digital workplace.

A Reality Check For Digital Processes

Despite the progress that's been made, the fact remains that many organizations still use large amounts of paper and still rely on time-consuming and error-prone manual workflows. This would appear to be good news for capture vendors — if paper is still part of the landscape for a significant proportion of organizations, then there will continue to be a need for digitization of that paper.

However, as we are seeing, the percentage of paper transactions is reducing year over year, so is this a sign of impending doom for the capture industry? Far from it.

We all know that capture is now much more than just the digitisation of paper into electronic files. For many years, capture vendors have been expanding their capabilities to process emails, faxes, text messages, and more.

To achieve true digital transformation, organisations need modern solutions for digitising, organizing, and processing all files and documents — regardless of format or where they come from — and modern capture solutions enable organizations to do this.

But while this approach provides significant benefits to the business and helps move the digital agenda forward massively, it also means that organisations often miss out on a much more significant benefit.

The heart of the challenge lies in misconceptions about what it really means to modernise the workplace. The idea of the paperless office began by taking a paper document and turning it into a digital file. That progressed to the digitisation and automation of core processes.

But the multitude of input formats (paper, email, fax, etc.) meant that for many processes, the automation journey created digital twins of the manual processes. However, the promise of the modern workplace is more than just converting paper into digital files and manual processes into digital equivalents.

Some organizations suffer more from this challenge than others. The real-world example of a large manufacturing

company offers a powerful example. The manufacturer asked its suppliers to submit invoices via an online portal, but many suppliers didn't trust the portal and ended up sending them by email as well to ensure the bills made their way through to the accounts payable department.

The problem was these two workflows didn't interact. As a result, the company experienced a 300% increase in the number of duplicate invoices paid that year.

This example illustrates a digital process that had not evolved from a single stream manual process to a multiple-input digital process. For a modern, digital workplace, we need modern, digital processes that are created based on the desired outcomes and the tools available — not simply the digital twins of outdated manual processes.

A Smarter Approach for Managing And Processing Documents

When organisations use the same manual approaches for managing document-centric workflows for digital files, then they're simply replicating the same inefficiencies they used when they were managing paper documents.

The concept of the paperless office is not so much about reducing paper consumption as it is about rethinking the end-to-end processing and tracking of documents in the digital era. Capture used to be an isolated activity that simply served as the starting point to individual processes. Now capture has an opportunity to become much more.

Consider the benefits of capture as an integrated component to a digital business. Not just a feeder for processes but a processing tool that can be connected to the growing number of other content services within the organisation.

It doesn't matter whether the content being processed by the capture engine is a picture taken by phone, a PDF coming through via email, or a scanned file – it should be quick and easy to extract the insight from that content and feed that information to the people, process, or IT agent to make use of it.

Next-generation Intelligent Document Processing (IDP) solutions do exactly that. Modern IDP offerings leverage artificial intelligence (AI) and robotic process automation (RPA) to automatically and accurately capture and extract business data from various types of content and export the information into workflows and content services ecosystems to help streamline and connect documents data, and processes.

In these scenarios, capture substantially reduces document processing time, decreases operational costs, and, more importantly, increases business agility.

For too long, we have considered capture either as a paper-processing tool or simply as a process-feeding toolset. As more and more content becomes digital, the role and importance of capture will continue to evolve.

IDP solutions that combine capture with AI, RPA, and other content-enabled services are poised to revolutionise the way enterprises extract information and value from all of their content and data. This isn't capture 3.0 — this is the start of something much, much bigger.

Ron Cameron, is president and co-founder, KnowledgeLake

Rural & Regional Councils and Shires

Questions & Answers to help you select the right EDRMS product for records compliance.

By Rainer Krause, ELO

1 Should I select a Standalone or embedded EDRMS?

There are many benefits that come from selecting an EDRMS provided as an add-on to your Council's Enterprise software, as a seamless integration or as a module. The benefits are great – Councils & Shires only need to deal with one vendor. But there is also a challenging side to it. We often see that embedded EDRMS can't "talk" to other systems. For example, if you want to have your inventory or warehouse system talking to the EDRMS as well as your Council software you would need to have an open architecture with APIs that can deal with many systems. Furthermore, you will become completely dependent on the ERP system supplier and – from what we have heard – they are often reluctant to have 3rd parties involved. A good EDRMS can "talk" to any system, either at database level or connected directly. That means that you don't need to worry today about what you might need in a few years' time.

There are also issues with ongoing updates to the EDRMS. You may only need to update the EDRMS regularly but embedded systems often require a full system update. We need to separate updates from upgrades. Updates should happen regularly to address for example data security whereas upgrades should only happen every 3-5 years.

Councils that focus on a specific EDRMS/DMS will have a solution that is more modern and able to be updated more frequently to keep it in line with the market. ERP systems that have an EDRMS embedded may – and I write may on purpose – need to focus on the entire solution, not just the EDRMS part.

2 Should we have the EDRMS on-premise, in the cloud or a hybrid solution?

This could be a very difficult question or a very simple one. Of course, cloud needs a good Internet connection and, in many places, the speed is good but in some places it's not. If the Internet speed isn't as good as it needs to be, then on-premise is of course the only way to stay compliant. It may be of advantage to consider a hybrid solution, meaning that the daily EDRMS usage is performed on a local server but backups could run overnight, when speed isn't much of an issue.

Pure online systems obviously cover the backup requirements but how do users feel if the connectivity is bad or frequently interrupted? We've also seen that the cloud provision is still a bit too expensive. With all benefits of the cloud, costs are the number two reason why customers select on-premise.

Of course, a monthly fee on its own look less expensive than an upfront investment for a new server, database operating system, etc. but hardware companies have adjusted their offering to remain competitive. A quality server with 3-4 years warranty, sufficiently spec'd for a 20 user Council/Shire may set you back \$A15,000.

A cloud environment, providing the same specs may cost \$A700-\$A1,000 per month ongoing. We've seen

entities being break even within 15 months by not going cloud but of course there's a downside. The local IT manager needs to manage the hardware.

Especially for Rural and Regional Councils & Shires this could be an issue, yet, we have had many discussions with "the local IT shop" and they are very happy to supply the servers and look after them – usually at low cost. So, the B/E point may be 24 months but it's still better. Local IT suppliers are well known to the Council members, their loyalty to their clientele is 110% and they are there 24/7.

Entities that decide for an on-prem server and want to have a standard EDRMS, in line with their state's requirements, may select having all pre-installed and the local IT shop essentially just does a "plug & play" with Council's active directory and installs on the users' PC. Having the server on-premise, doesn't mean that Internet connectivity isn't there. A good EDRMS has installed clients, browser-based user interfaces or even smartphone options. The important thing is that users can work off-line and synchronise when on-line again; especially when geospatial data is attached to photo records.

In summary, if your Internet speed is OK and the break-even point is beyond 36 months, then cloud-based EDRMS is an option. Otherwise, an on-premises server should be considered. Talk to your "local IT shop" – they know.

3 Can we manage the EDRMS ourselves, or should we go with Software as a Service?

Software as a Service (SaaS) has become a buzzword over the past 24-36 months, as it has become increasingly easy to manage software remotely, or have the software installed in the cloud and maintained by the provider. As mentioned above, cloud is not an option for everyone because of cost or bandwidth reasons; though this doesn't mean that the software can't be maintained remotely. The big question is the understanding of what SaaS really is? Some entities just want the software to be maintained regarding updates, technical support and health checks. These items are usually easy to do but when it comes to content support, recommendations, consulting, change management, BCS/RDA changes, etc. then SaaS is more difficult to define. Here we separate them into SaaS being the pure software service and Consulting. Most commonly, software vendors offer the software as a product and then add annual fees on top, so that entities have access to warranties, update and upgrade software.

When opting for a technical SaaS offer, both software and technical maintenance are covered and usually spread over a period of 3, 4 or 5 years. This model is very good, especially if you don't have technical expertise on-site.

Good software packages are easy to maintain. Regular updates can be managed and deployed by the local IT administrator and only more difficult upgrades need to be done by the vendor. In other words, if you have a skilled IT administrator SaaS is an option and if you don't have someone, SaaS is a must.



4 Do I really need my system to be different from others or do I like plain Vanilla?

We recently won a new customer and the first thing the CFO and the CIO said was: I like Vanilla! Solution providers that specialise in consulting services will begin their pitch by asking you "what would you like to have?" or "let's start with a scoping session to find out what you want." A "Vanilla" supplier starts by asking "what you need" and not what you want. Regional and Rural Councils and Shires are often very different operationally and in how they serve their population, but with regards to state records requirements, they are usually very similar if not even identical.

A big advantage of a plain Vanilla EDRMS is around training, maintenance and support. Users in standard implementations can be trained in group sessions – online. Online, standardised training can be provided by the vendor free of charge; at regular intervals, allowing Councils and Shires to participate online or watch afterwards. This minimises dedicated training and the associated fees.

Finally, standardised implementations will be very fast. Implementing a Vanilla system should not take longer than 10-15 days because the vendor doesn't need to change its system and consulting time is limited to the absolute needs and not the "wants".

5 CAPEX or OPEX – is there a "right" decision?

The answer is: No. It's not about right or wrong, it's about what you can afford. Councils and Shires need to be compliant but every entity has its own challenges getting there. If the budget allows it, a CAPEX investment is good but you need to be aware that the software will be shown in your balance sheet, even though it's a necessity for daily operations. OPEX investments have the advantages that they only show in the P&L. OPEX has the biggest advantage that Councils & Shires can allocate their funds better to the urgent needs of running the area, support local businesses and spend on infrastructure. A software subscription

(OPEX) will of course be slightly more expensive over the lifecycle of the contract because vendors need to take the cost of finance into account but this extra cost amortised over – say – 5 years usually doesn't increase by more than 10-15%. CAPEX has the advantage that you don't need to look 5 years ahead and always remember to put the cost of the EDRMS into your budget. As a rule of thumb, Councils and Shires should consider a cost of \$1.25 - \$1.75 per user per day when opting for an OPEX implementation. And these amounts should have at least 15% of the professional services included when opting for a standardised solution. The more you change the standard, the more expensive will the compliance be.

As the software component isn't the key cost factor, it is recommended to look for a system that implements state records requirements essentially out of the box. There shouldn't be an extensive need for consulting services – at least not during the implementation. Remember, if your Council or Shire want a customised EDRMS, it's going to be significantly more expensive.

Truly consider what you need. Here's a list:

- A software that is fast to deploy
- A pre-configured standard BCS/RDA
- An implementation duration of not more than 10-15 service days
- A software that can be maintained by the Council or Shires directly
- Potentially a software that can do more than just EDRMS such as:
 - Contract Management
 - HR Documents
 - Document control
- A software that has electronic signature embedded
- A software that can easily and at no cost be embedded with Microsoft Office

Rainer Krause is Managing Director of ELO Australia.

<https://www.elo.com/en-au.html>

AI Market to Hit \$US62B in 2022: Gartner

Worldwide artificial intelligence (AI) software revenue is forecast to total \$US62.5 billion in 2022, an increase of 21.3% from 2021, according to a new forecast from Gartner, Inc.

“The AI software market is picking up speed, but its long-term trajectory will depend on enterprises advancing their AI maturity,” said Alys Woodward, senior research director at Gartner.

The AI software market encompasses applications with AI embedded in them, such as computer vision software, as well as software that is used to build AI systems. Gartner’s AI software forecast is based on use cases, measuring the amount of potential business value, timing of business value and risk to project how use cases will grow.

Gartner forecasts that the top five use case categories for AI software spending in 2022 will be knowledge management, virtual assistants, autonomous vehicles, digital workplace and crowdsourced data (see Table 1).

Table 1. AI Software Market Forecast by Use Case, 2021-2022, Worldwide (Millions of U.S. Dollars)

Segment	2021 Revenue	2021 Growth (%)	2022 Revenue
Knowledge Management	5,466	17.6	7,189
Virtual Assistants	6,210	12.0	7,123
Autonomous Vehicles	5,703	13.7	6,849
Digital Workplace	3,593	13.7	4,309
Crowdsourced Data	3,483	13.6	4,171
Others	27,049	14.1	32,827
Total	51,503	14.1	62,468

Source: Gartner (November 2021)

“Successful AI business outcomes will depend on the careful selection of use cases,” said Woodward. “Use cases that deliver significant business value, yet can be scaled to reduce risk, are critical to demonstrate the impact of AI investment to business stakeholders.”

Demand for AI technologies and associated market growth is closely tied to organisational AI maturity levels. Enterprises continue to demonstrate a strong interest in AI, with 48% of CIOs in the [2022 Gartner CIO and Technology Executive Survey](#) responding that they have already deployed or plan to deploy AI and machine learning technologies within the next 12 months.

Yet, the reality of AI deployment is much more limited. Gartner research found that organisations commonly [experiment with AI](#) but struggle to make the technology a part of their standard operations. Gartner predicts that it will take until 2025 for half of organisations worldwide to reach what Gartner’s AI maturity model describes as the “stabilisation stage” of AI maturity or beyond.

Advances in AI maturity will increase AI software revenue due to increased spending, particularly across the data and analytics-related technology category. A lag in maturity — caused by reluctance to embrace AI, lack of trust in AI and [difficulties delivering business value from AI](#) — will have a corresponding deceleration effect on spending and revenue.

ANZ Organisations Up Software Spend

With COVID-19 significantly increasing the pace of innovation, the beginning of 2021 had witnessed a strong rebound in software spending across ANZ. According to IDC’s Worldwide Semiannual Software Tracker, 1H2021, the total ANZ software market reached US\$7.5 billion, showing a double-digit annual growth in both countries.

It grew by 20.6% year-over-year (YoY) in Australia and 20.4% - in New Zealand, during the first half of 2021. More organisations are embarking on their digitisation journeys and leveraging digital technologies. This is not only to remain afloat, but also to champion customer, employee and partner journey and support.

ANZ organisations continue to invest in cloud services to increase competitiveness, efficiency, business resiliency and support innovation. In 1H2021, cloud adoption showed a strong annual increase of 31%, where cloud revenues now represent 45% of the total ANZ software market.

Not surprisingly, the collaborative applications market witnessed the strongest annual growth (49%) and reached US\$257.8 million across ANZ software market. Businesses keep heavily investing in Conferencing and Team Collaborative applications to support productivity, effective communications with clients and partners, and also very importantly – to promote engagement and a sense of belonging among employees in a new hybrid environment.

Artificial Intelligence Platforms have shown the second strongest YoY increase, growing by 35% across ANZ, reaching US\$111.5 million. This rapid growth indicates strong demands from ANZ organisations in modernisation and streamlining of core business processes.

Implementation of AI Software services and Intelligent Knowledge discovery tools is on the rise to support decision-making, forecasting, and to improve business outcomes.

“In an increasingly digital-first world, an abundance of customer and business data fuels wider adoption of AI platforms,” says Anastasia Antonova, Senior Market Analyst at IDC Australia/New Zealand.

“To stay on top of the game and meet individual customer needs, organisations across ANZ invest in intelligent process automation tools and leverage AI capabilities to revamp operational processes, improve customer and business data analysis, support decision-making and

forecasting, and, as a result, ensuring flourishing customer experience”, Antonova continues.

The Integration and Orchestration Middleware software market recorded a third strongest annual growth of 31% across Australia and New Zealand, reaching US\$164.6 million in 1H2021.

As the world had witnessed over the last two years, COVID-19 has massively accelerated digital and innovative initiatives, leading millions of businesses to explore and adjust to a new reality, where digital comes first.

Such strong growth of integration software has been largely driven by legacy modernisation, hybrid integration, workflow/process automation and API-led innovation initiatives.



Image kindly donated by the Shire of Carnarvon

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Breaking the shackles of history

To modernise enterprise compliance and liberate your people

By Simon Blunt & Michelle Phillips, Information
To paraphrase Wayne from Canadian comedy series Letterkenny: "I was talking digital transformation with my friends the other dayyyy....." And it got me to thinking about a horse's rear end.

Now before you write me off, please indulge me a little longer. We are working entirely digitally more than ever before. Across industries we've gone cashless, people don't ask for paper receipts at the register because they have a digital record on their phone (and in Australia at least, we can assume the tax office equally has access to that data).

For years we have been talking digital transition and taken small organic steps along our chosen path. It has been slow progress, and some say ineffectual.

The arrival of the COVID-19 health crisis suddenly provided the impetus to make the jump.

We are now accessing and using online tools for

business more than ever. There's no more printed copy, but even so we continue creating portrait-oriented representations of paper pages, that include "wet signature" sections on our ultra-wide landscape-oriented monitors. Talk about old habits!

I see somewhat a parallel between our race from hard-copy to digital operations and the NASA space shuttle program launched in the 1980s.

Legend has it the engineers who were designing the solid-fuel booster rockets (SRBs) used to launch the shuttle out of the atmosphere, would have liked to have made them larger in diameter to deliver a more effective thrust at launch. They were however restricted by the [width of railway tracks](#).

Thiokol's factory in Utah manufactured the SRBs which were then transported by rail to the launch site at Cape Canaveral.

That railway runs through a tunnel, and the SRBs had to fit through that tunnel. The tunnel is wide enough to accommodate the tracks and the trains which use them,

and the U.S. standard railroad gauge is 4 feet 8.5 inches.

You might think "that is a very particular and unusual number. [Where did that come from?](#)"

The US railroads were built by English expatriates who brought this standard from the UK. The English railroad standard grew from the original pre-railroad tramways, and that's the gauge they used. To cut a long story short the dimensions were linked to Roman war chariots.

Which brings me back to the horse's behind. The imperial Roman war chariots were made just wide enough to accommodate the back ends of two war horses. And so, as you can see, a major design feature of a Space Shuttle was originally determined by the width of a horse's rear end. A case of history influencing or restricting future decisions.

What does that have to do with digital transformation? A lot. The underpinning design concept of our digital record keeping systems centres on the notion of paper pages being filed into folders and filing cabinets. While we reach for the skies (or cloud) digitally, we are hampered by our concept of record keeping.

Organisations invest millions in integration between end-user digital interfaces, and back-office electronic document and records management systems (EDRMS).

The assertion is that to be a record, the data must take on a certain form, and must be stored in a certain type of repository. These integration solutions invariably require the end user to perform manual filing type tasks (as per paper) to capture their digital information.

The way the digital native creates and consumes data and makes decisions has little alignment with traditional paper/page-based data structure. Organisations that continue to doggedly pursue a traditional approach to information governance will ultimately reach an untenable position where they can no longer compete financially, nor in terms of speed, against those organisations that move to a more sustainable future state.

Let's agree right here that there is at least another human generation that must grow old and retire from the workforce before that antiquated paper standard becomes truly redundant. In the meantime, we will continue to see an acceleration of "document" objects being born into the "cloud". Your Information Governance solution must service records where content exists, not sit alongside as a sort of backup or archive.

Traditional systems struggle to adapt to this current mode of operation, and the middleware approach of tightly integrating the old to the new is unlikely to prove effective long term. Moreover, document capture in traditional systems fails to scale with the volume and type of content being created (think about email or Teams chat).

Transactional records stored in a CRM, or an Asset management solution for example are ignored by the very design of the traditional EDRMS and the paper paradigm.

As the generational change continues to take place, users and designers of applications will be less and less compelled to emulate the paper paradigm, with increasing preference for function over form.

Increasingly we are hearing from organisations who rushed their users into MS Teams, SharePoint, and OneDrive, how they are struggling to quantify what their compliance risk and exposure really is. Not one person in those conversations is thinking about migrating content into an EDRMS to address future risk: the problems are too immediate. Instead, they want to know how they can wrap a compliance blanket around the whole situation.

Equally vendors are rushing to develop point solutions to connect M365 applications with traditional EDRMS.

Most of these are constrained by the paper paradigm and condemn organisations and their staff to the manual, complex and ineffective practices that paper has driven. Not to mention the cost of managing these point solutions and what to do with all the other business systems and repositories in use outside the EDRMS.

Isn't it time to break the shackles of history and take a fresh look at enterprise compliance?

So, when you are looking at today's compliance challenges, ask yourself whether your solution design is tackling the right end of the problem. Maybe it is time to take a step back and look at your information management and governance strategy more holistically with fresh eyes.

If you were starting from scratch and could leverage today's modern technology how would your information management and governance look?

Are you leveraging AI, Machine Learning, and automation to streamline and improve document capture and classification?

Have you adopted the "born digital stay digital" mantra - leveraging the use of electronic signatures where you can - to streamline processes and approvals?

Can content be managed in place instead of moving it to a central repository? Are you thinking about how content supports your business objectives and helps you deliver desired outcomes instead of simply ticking a compliance box?

If you're ready to break the shackles of history and explore what modern enterprise compliance could look like in your organisation, please get in touch at customersuccess@information.com.au

We would love to talk with you.



EncompaaS to automate compliance at Bendigo and Adelaide Bank

Bendigo and Adelaide Bank has chosen the Australian EncompaaS enterprise compliance platform to automate its regulatory and business governance obligations for electronic documents as it moves to shift 50 percent of its applications to the cloud over the next three years.

The new SaaS EncompaaS platform will allow the Bank to automatically manage its obligations in relation to electronic documents within its Microsoft cloud-based environment, which will in turn, strengthen the Bank's governance, compliance and security, and further improve productivity and business agility.

By consolidating and centralising its electronic records in the new M365 environment, Bendigo and Adelaide Bank expects to strengthen existing controls which will ensure customer information is stored securely, used only for the specific purposes intended, and retained only for as long as required.

Leveraging Artificial Intelligence (AI), Machine Learning (ML) and automation, EncompaaS will allow the Bank to more efficiently discover, analyse, enrich and manage its electronic documentation at scale, and according to its governance policies. EncompaaS will also support fraud management by preventing the unintended deletion of records and providing detailed audit trails.

Auto classification will be a key focus of the EncompaaS implementation, with AI and ML used to identify and classify documents as they are created. This will remove the need for Bendigo and Adelaide Bank team members to manually classify documents, which will make the process faster, more accurate and improve overall compliance.

EncompaaS's metadata enhancement capabilities will also round out the migration of records into the Microsoft 365 environment by recognising and extracting key customer identifiers and other metadata from the original documents – something not previously possible with standard migration tools.

"At Bendigo and Adelaide Bank, innovation is at the core of everything we do, so as to ensure we remain relevant in the eyes of our customers," said Andrew Cresp, Chief

» Bendigo and Adelaide Bank

Information Officer, Bendigo and Adelaide Bank.

"Our technology and transformation strategy is centred around reducing complexity, building digital capability, and delivering new services for our banking customers. This strategy is helping us simplify and optimise our business by allowing us to use automation and digitisation to drive value from our technology investments.

"The EncompaaS compliance platform is a tool which will greatly increase Bendigo and Adelaide Bank's ability to understand, manage and analyse its customer data, which in turn, will allow the Bank to further streamline and tailor its service offerings to better meet our customers' specific needs," said Cresp.

"Bendigo and Adelaide Bank – and other leading organisations that have recently joined the EncompaaS community – demonstrate the innovative and forward thinking required to get ahead of the information governance curve in a digital world," said EncompaaS CEO Jesse Todd.

"Most organisations we talk to are struggling to keep up with today's complex data and regulatory requirements, let alone leverage the value of their content to make better decisions and deliver better services to customers," said Todd. "Our goal is to help organisations discover, understand and enrich their content so they can inform decisions and strategy in real time, and meet their broader obligations more easily, not just records management."

<https://encompaas.cloud/>

Banking on a Digital Future

Bendigo and Adelaide Bank has revealed a two-year roadmap to complete a comprehensive digital transformation which involves integrating a number of subsidiary banks and credit unions and replacing legacy systems. The bank intends to reduce the number of core banking systems used by brands like Delphi, Alliance and Rural Bank from eight to one by 2024.

Marnie Baker, Chief Executive Officer and Managing Director, said, "We have made a great start to building the future over the last 2 years by significantly progressing our simplification,

modernisation and digital transformation roadmap.

It has migrated from AWS to the Google Cloud Platform, becoming the first cloud-hosted retail bank in Australia. During 2020 and 2021 the

bank has reduced the number of technology applications by 13% and provided capability for digital uploading and acceptance of documents by its customers.

It has plans for the 2022/2023 Financial Year to progress to a single document management and collateral management system, provide

(Continued on Page 27)



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EncompaaS:

- Delivers manage in place compliance across M365 including Teams and SharePoint Online
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- Provides a single interface to manage content, and compliance across enterprise systems and repositories

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



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Announcing the Email Archiving with PDF Liaison Working Group

As a means of communication, email is ubiquitous. As a result, an email is often the only evidence of a transaction or interaction between individuals. Yet email is surprisingly easy to forge or tamper. It is therefore critical that the file formats used to represent email outside of their original systems capture and retain the metadata necessary to demonstrate trustworthiness.

Like email, PDF is ubiquitous. Unlike email, PDF is defined by an ISO standard (ISO 32000), and is employed worldwide to capture a wide variety of source document formats in a platform-independent manner.

Today, almost every email client includes the ability to save email messages as a PDF file, but none do so in a manner that retains email structures or metadata proving message authenticity. Such outputs are plain "digital paper" - fixed versions of the messages lacking email's core attributes. There is a better way.

Why EA-PDF?

Email technology does not include a concept of a "native" email presentation; preservation outside the source systems implies some degree of transformation. PDF, on the other hand, is broadly adopted for presentation and preservation purposes. The format is prevalent throughout business and industry, with viewers included with the operating systems and browsers on almost all consumer devices.

While emails can be exported, stored, and preserved in something approaching their native formats (for example, PST, MBOX, or EML files), those files are typically rendered and viewed with email software. For security, the potential for confusion, and other reasons, many people are simply uncomfortable with the notion of importing others' archived email into their own email systems.

Likewise, most repository software does not natively display these formats. So long as email source data is preserved, well-considered packaging and representation of email using PDF can provide a straightforward, ubiquitous, and highly secure way to access and view archived messages, complementing preservation approaches such as those treated at length in the [Future of Email Archiving Report](#).

While sometimes underappreciated as such, PDF is a natural target format for email preservation.

Existing package structures, such as MBOX, reflect application-specific features, and content cannot be easily and reliably rendered outside of an email client environment. Domain-specific tools rely on internal databases and are not independent preservation solutions.

PDF, on the other hand, is a supported file format in most existing preservation repositories and digital libraries. In addition to its familiar page rendering capability, PDF is a highly structured and documented container format supporting dozens of document-specific features and rich capabilities.

PDF technology represents, effectively, a platform-independent free-form database with built-in standardised support for [ISO 16684 XMP](#) (Extensible Metadata Packaging). These qualities explain its broad appeal and implementation, as well as its suitability for packaging metadata together with visual content. Relevant archives user communities, including local, state, and federal archives, as well as museum archives, university archives, and special collection units, have requested PDF-based archiving options for email ([Task Force on Technical Approaches for Email Archives](#): 82-83).

The EA-PDF LWG

Having obtained a grant to continue exploration of the EA-PDF concept the University of Illinois [has chosen to fund the PDF Association](#) to develop a detailed technical specification defining the interoperable use of PDF ([ISO 32000](#)), and possibly, PDF/A ([ISO 19005](#)), as an archival medium for email.

In a separate effort the University will also fund development of an open-source proof-of-concept implementation of the specification (member contributions or technology and expertise toward the proof of concept are also very welcome).

The PDF Association's procedures for development of the specification are fully aligned with ISOs, so that any outcome has a potential to become an ISO standard. Its Liaison Working Group model allows for PDF Association members to discuss and vote on the documents produced while allowing non-members to monitor the discussion and contribute their expertise.

Learn more about the [EA-PDF LWG](#).

Read the University of Illinois's own [announcement](#).

Originally Published [HERE](#)

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seamless customer onboarding and implement loan processing automation.

The bank also plans to reduce its number of applications to 325, down from 650 in 2019, having already cut 13 percent of applications over the past two years.

On its digitisation approach, the bank expects home loan approval wait times to drop to one day by 2024, compared to 22 days in 2019.

"Delivering and embedding digital capabilities to improve the experience for our customers as well as digitising and automating core processes, is a key part of our transformation roadmap, as is reducing complexity and costs," said Baker.

Ryan Brosnahan, Chief Transformation Officer, said, "I recently heard Brett King say that the reason the world needs fintech is because banks around the world run on 1960s technology (mainframe core banking system) and are offering a 14th century based product (the bank account) which is protected by a 1st century security mechanism (a signature). He is obviously being provocative but there is an element of truth in this.

"We are in the midst of unwinding the labyrinth of technology we have and rebuilding it in a way that is digital first, run in the cloud, API enabled and driven by microservices.

"This approach also means we start to eliminate the disadvantages of being small as we can create brilliant propositions for our customers and therefore move faster and incur less upfront cost.

"For example, last year, we enabled our customers with the ability to sign documents digitally in 6 weeks from having the idea through to customers actually executing documents. We moved our entire workforce to working from home in 2 days at the start of Covid and in commencing our move to cloud based hosting, we moved our first 30 workloads to AWS in 30 days.

"We are focused on digitising the right experiences and interactions with our customers to make these interactions easier and more convenient. This focus on digitisation through an operational excellence lens enables us to remove friction, lower our costs, improve speed, consistency and scale for growth, while also being more productive.

"For example, in our home loan processing area we have improved productivity by 25% over the past year by; re-engineering our processes, cross-skilling our staff, and using data and analytics to focus in on and unblock bottlenecks to improve flow.

"We have simplified our business by: Reducing the number of our Technology applications we run by 13% (653 to 570). We have established multi-cloud capability and have containerised our workloads in a way that we can easily move between different cloud providers, we have proved by moving workloads from AWS to Google in a few days."

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Digital transformation fails: Are you automating the wrong processes?



By Richard Rabin, Head of Process Excellence, ABBYY
Process mining is the secret sauce in digital transformation: A recent survey of 1,220 IT decision makers worldwide shows that many organizations have automated the wrong procedures, wasting time and money.

According to the survey, more than one in five respondents (22%) abandoned their automation project completely, while nearly one in three (32%) said the technology didn't work as intended.

Process mining brings together event data from across a set of distributed processes throughout a business to create a "digital twin" that can be analysed for workflow efficiency. Put more simply, it is advanced AI technology that digs deep into your company's operations to scrutinize procedures and tell you exactly how those can be done better.

While this can be extremely beneficial, traditional process mining does come with challenges that you must understand. It's not a one-size-fits-all technology suitable for every type of process.

Here are three common blind spots that organizations can easily overcome by looking at capabilities that may be underutilized.

1 Schema can't usually capture every useful path

In traditional process mining, most approaches rely heavily on a flow diagram, or schema, of the process being analysed, such as the one in the figure below. These diagrams are typically augmented with metrics on timing or the count of instances that follow a path from one event to another.

Schema are useful for understanding what is happening in a distributed process by taking all the data from all

systems of record and showing the process flow, how long it takes, and how many instances tend to take one branch versus another.

The limitation with this approach is that, while some business processes tend to follow a small number of path variations, others have much more variability.

For many problems of real-world complexity, there are so many routes involved that a flow diagram of all the data would be so complicated that it would be useless. Think of a scribble by a two-year-old child and you've got the picture.

To address complexity and variances, IT providers often offer ways to filter which data is included. This can mean limiting data from various ways a process is completed to follow just the most common path taken.

While this can be useful, in a highly variable process, such as a case management situation, filtering out enough data to make the diagram useful risks removing data that is significant to your results, thus invalidating the insights provided. Remember, the most common path taken might be the least efficient.

Process intelligence, the next-generation approach to process mining, deals with this by including the process flow diagram and a wide range of additional numeric analytic tools that provide process metrics and insights, regardless of the variability of the procedures.

The analytics include displays of all specific paths followed, with associated metrics for each, as well as analytic modules to show bottlenecks, costs, timing between steps, event deadlines, various process metrics, and metric histories. You can expect to also see dimensional breakdowns for these.

This use of additional numerical analysis, along with less reliance on the schema diagram, extends the usefulness

of process intelligence beyond that of process mining to include all processes, not just those that follow a small number of path variations.

2 Understand and include the manual tasks

The next blind spot involves process steps that are done manually by people on their computers.

When people manually perform a process step on their laptop, they often are logged into an application that will record what is done and when. But many times they are not and instead are looking up data online, changing data in a spreadsheet, or doing some other task that does not create an easily usable trace of the activity.

How people complete their tasks is relevant to how a process is completed. Therefore, many companies are leveraging "task mining" to capture these activities and convert the low-level data on typing/clicking into higher-level events. These events can then be analysed similarly to the process events captured directly from various systems of record.

The point is not to go into detail on task mining, but simply to emphasize that it needs to be considered as part of the process mining plan. Without task mining, you will be only partially successful at understanding an end-to-end process. There will be gaps, with no data to help understand where people's time is spent or why.

3 Don't forget unstructured data

Another key blind spot with process mining is the access, integration, and understanding of unstructured data. Not all data is available in a log or database generated by a system of record.

Capturing manual activities with task mining will provide information on what users are doing on their computers, but that will still leave a lot of data that is in a physical document or in an unstructured text field such as a form.

In some cases, you may not need that unstructured data, but in many others, you will need it for the context it provides to a process. It may provide an analytic dimension to slice and dice your metrics to better understand your process results.

When planning a process mining or process intelligence strategy, take into account what analysis you want to be able to do with your data and if unstructured content is a part of that. You may need to consider intelligent document processing solutions to transform unstructured data.

Or you might select a process framework that already has intelligent capabilities to extract information from unstructured content.

Know your blind spots

Process mining can prevent your organization from becoming one of the statistics of a failed digital transformation project—but only if you are aware of

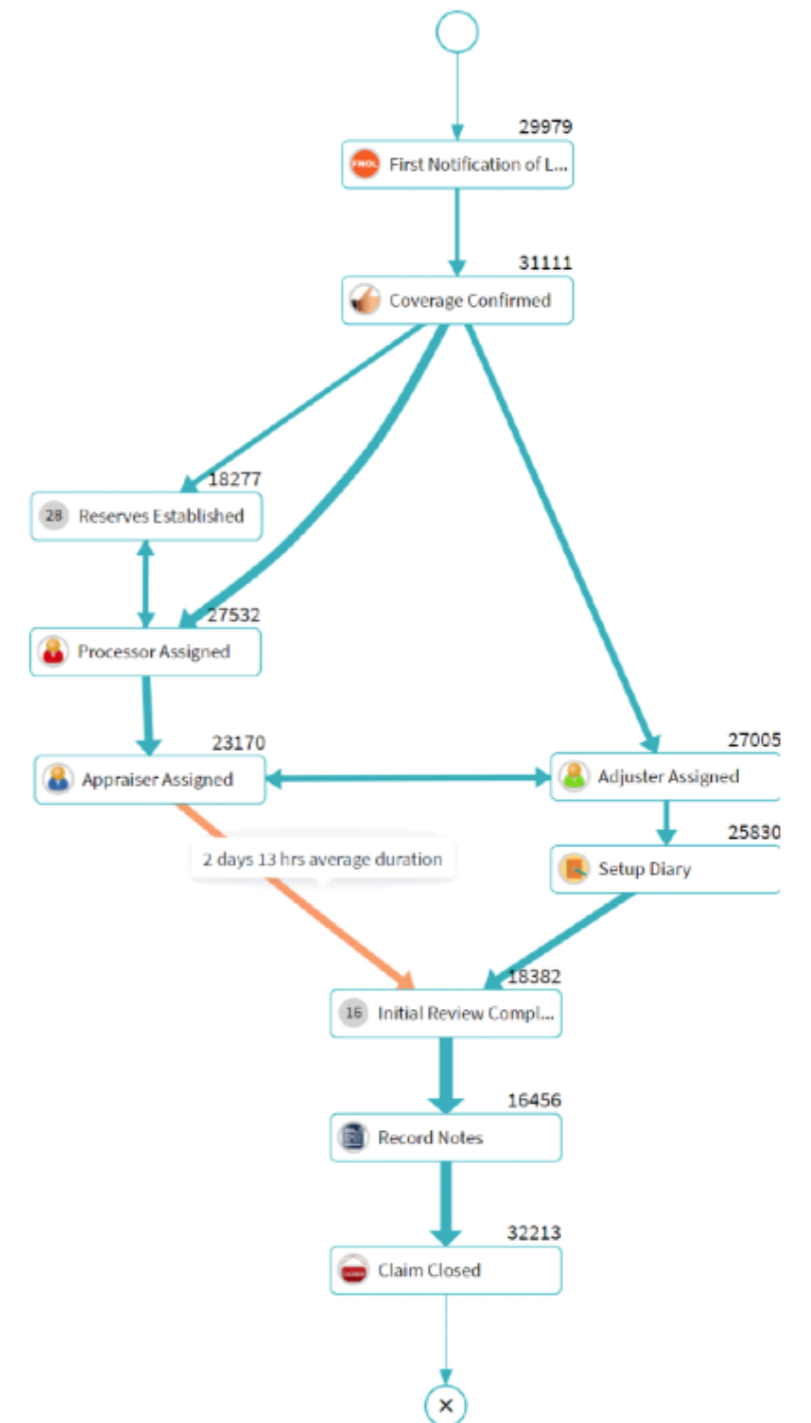


Figure 1. Example of a process flow diagram. Source: ABBYY

your potential blind spots. You want to be able to benefit from behaviour and discovery analysis, monitoring, and capability prediction and automatically take action when a process instance requires it.

Your digital transformation projects will also need access to events and data that are often missing in these analyses. These might include manual steps that are not logged in any system of record and unstructured data that is often present as a part of the overall process but is not readily available to be used for context or as an analytic dimension.

Ultimately, the focus needs to be on the insights delivered and on the outputs from process intelligence and how those outputs allow your organization to better achieve your desired results for digital transformation—and not fail.

Esker announces Customer Impact Award Winners for 2021

Esker Australia has announced the winners of the Esker Impact Awards 2021, designed to recognise companies that have excelled in transforming their business and finding innovative ways to achieve great value from their Esker solutions.

In the Procure-to-Pay space, Ego Pharmaceuticals are the winner of the Best Results in achieving business achievements, while in the Order-to-Cash space Fletcher Building won the Best Results award.

Australian-owned, Ego Pharmaceuticals produces a comprehensive skin and healthcare range for sale in Australia and around the world. It was named by the Australian Financial Review in the Top 500 Private Companies list for 2021.

Founded in Melbourne in 1953, Ego Pharmaceuticals now employs over 600 staff across 15 nations. The organisation remains Australian family owned and operated, with all products still being manufactured in Victoria. Ego engaged Esker to provide a digital supplier invoices processing solution that would integrate with its SAP ERP. In December 2020, Esker Accounts Payable solution went live across the business, replacing the old paper-based invoice process.

Since implementing Esker, Ego has seen improved governance and efficiency. With invoices all in one central digital location, staff and managers can check their own invoices in Esker for status updates, and there's better transparency and accountability of spending courtesy of Esker's workflow system and the approval limits.

In addition to this, implementing Esker for invoicing saves Ego from printing 70,000 pages each year.

Alan Oppenheim, MD, Ego Pharmaceuticals, said, "We are honoured to accept this award on behalf of Ego Pharmaceuticals, which recognises the great results that we've had with implementing Esker into our business."

"Ego makes products to treat skin disease and to maintain healthy skin. You probably already have Ego products in your home, probably in your bathroom. Prior to implementing Esker, Ego's invoicing process was paper-based. There was limited visibility of invoices. Staff did not know if their supplier invoices had been paid and managers had no visibility on what their teams were submitting for payment. There is a risk of paper invoices getting lost and payment being delayed. Ego needed a digital invoicing solution that would integrate without our SAP setup. In June 2020 we started work with Esker to develop the best solution for us. Within two months, we'd begun testing and we are able to roll at Esker across Ego in December 2020."

Michael Normoyle, Group Finance Manager, said, "Since implementing Esker, we've seen improved governance

and efficiency across Ego. With our invoices all in one central location, there's no risk of them getting lost in a pile of paper on someone's desk. The accounts payable team receive fewer internal enquiries as staff and managers can check their own invoices in Esker for status updates.

"There's better transparency and accountability in spending courtesy of Esker's workflow system and approval limits that we set our staff. A huge thank you to Ego project team and Esker for recognising Ego for this award."

The Esker Order-to-Cash Best Results award was given to the four business units of Fletcher Building that are live with the Esker solution: Firth Industries, Winstone Aggregates, Fletcher Steel and Laminex, Australia. These companies have each implemented the Esker Cash Allocation solution which automates the process of remittance advices and easily allocates payments to open invoices in the ERP.

Fletcher Building is dual listed on the NZX and ASX and operates through six divisions – Building Products, Distribution, Concrete, Residential and Development, Construction, and Australia. It employs some 14,500 people in New Zealand, Australia, and the South Pacific.

The Building Products Division employs over 2,000 people across more than 60 manufacturing, distribution and sales sites in New Zealand. It creates products used to build homes, buildings and infrastructure – including insulation, plasterboard, steel products, laminate surfaces and plastic and concrete piping.

The Building Products Division also includes businesses under the Fletcher Steel brand, which cater for all of New Zealand with operations in the country's 13 largest cities.

Saziya Shah is on the Winstone Aggregates Accounts Receivable team.

"We have been using Esker Cash Allocation for about almost 12 months now. The solution has provided us with very accurate and automated receipting, said Shah.

"Also, it has been a huge time saver for us, especially during month end times. So, we are very happy with the solution. Thank you, Esker."

Mozima Mohammed from the Fletcher Steel Credit team, said, "It is a great honour to receive the best results award from Esker."

"I have to say Esker has changed our lives in terms of Cash allocation. We wanted a simple tool to provide automation in a manual process and stop getting up at 5:00 AM at the end of the month to process payments. So, to transform the idea into a real output required

(Continued Over)



COLLECTIONS AND CASH ALLOCATION

EMPOWER YOUR AR TEAM & REDUCE PAST-DUES

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



Reduce DSO

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



Improve Visibility

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



Free Up Staff

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



Improve CX

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

WHY ALLOCATE CASH WITH ESKER?

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

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

A UNIQUE USER EXPERIENCE

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

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

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

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Esker Impact Awards 2021

(From Previous Page)

a good deal of effort, but we were successful with the support from the amazing team at Esker, our project team and our managers. It is a wonderful achievement, so thank you so much.

Fletcher Building subsidiary Firth Industries has been developing, manufacturing and delivering concrete and concrete products to New Zealanders for almost a century. The division implemented Esker Order-to-Cash Allocation solution in February this year.

Amy Wright, Firth Industries, Credit Manager, said, "The efficiency gains we have gotten from using Esker are phenomenal. We've gone from manually processing on the bank statement to Esker doing all the heavy lifting."

The Esker Impact Awards 2021 also included categories for Procure-to-Pay Advocates of the Year (Vicki Dreaver, PanAust and Tejasvi Thaker & Liz Sherry, Yooralla) and Biggest Champion (Melissa Xuereb, Are Media). For the Order-to-Cash category, Advocate of the Year (Elaine Huang, Whale Logistics) and Biggest Champion (David Baker, Freo Group)

Australian incorporated company PanAust Limited (PanAust) is a copper and gold producer in Laos with pre-development opportunities in Laos, Papua New Guinea, Myanmar and Chile.

Vicki Dreaver, PanAust Business Process Lead, said "We just love the Esker product, our AP team of Super users in Laos love it too. They use the teach functionality and they're focused on ongoing improvements as well.

"We in the IT team use Esker as our cloud-based support model gold standard. We tend to get more involved in some of the bigger improvement opportunities around little developments to help us fight cyber crime. We just work really well with the Esker team. Not only does it fit seamlessly into our SAP landscape, but the team is just great to work with. Cheers to the Esker team and a thank you."

Christophe DuMonet, Managing Director at Esker Australia and New Zealand, said, "Today's buzzwords - transformation, optimisation, and evolution - all point to technology being a given.

"Esker's solutions provide cutting edge technology that transforms your transactional business processes, that is a given. I am proud to say that in the last 15 years we have supported our customers on their continued journey of transforming the transactional team from a cost centre into a value-add stakeholder for the business.

"2021 became about finding flow in this strange, new time. Esker's on-demand solutions allow our customers to go above and beyond by removing the repetitive and mundane document processing."

Esker adds new Claims and Deductions Solution

Esker has announced the launch of its Claims & Deductions solution to help businesses efficiently manage their deduction claims and protect margins.

As an integral part of Esker's Order-to-Cash suite, Esker's Claims & Deductions solution enables customer service and finance departments to quickly resolve customer issues and keep short payments under control.

Thanks to AI-driven data capture and electronic workflow capabilities, Esker eliminates the manual pains of traditional claims processing.

The solution manages both customer claims associated with products (e.g., product shortage, damaged products, etc.) and customer financial deductions (e.g., trade and promotional invoices, penalty charges, marketing contributions, etc.) that typically impact food, beverage and consumer goods manufacturers and distributors.

And, thanks to seamless ERP integration, once deductions have been approved in Esker's solution, they can be automatically accounted for in the ERP as a credit note or on a G/L account.

Overwhelmed by short payments, deduction claims and time spent investigating customer issues, businesses often write off small amounts because they take too much effort to reconcile.

In fact, according to a 2018 IOFM report, researching and resolving an unauthorised customer deduction carries an average cost of

\$US200-\$300. Furthermore, studies show that a successful retail channel supplier operating on a 10% margin loses, on average, 3.7% to preventable and erroneous customer deductions.

"The new Claims & Deductions solution complements the Esker Order Management solution run by over 50 companies in Australia and New Zealand," said Christophe DuMonet, Managing Director at Esker Australia and New Zealand.

"This will bring tremendous productivity to both customer service officers and accounts receivable officers in processing time-consuming claims and resolving situations that typically require collaboration across teams, time zones and locations.

"With the new hybrid way of working, all team members can now easily and quickly collaborate and drive mutually satisfying outcomes for their customers."

"Esker's goal is to continuously promote positive-sum growth in as many areas as possible to create an ecosystem where all stakeholders create value together," said Jean-Michel Bérard, CEO at Esker.

"Our Claims & Deductions solution applies this ambition to the often contentious realm of payment disputes and short payments to create mutually beneficial customer-supplier relationships.

"We aim towards helping everyone reach a better process."

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



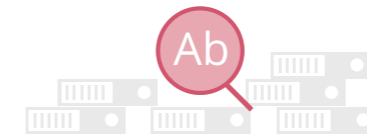
ABBYY® FlexiCapture®
Take the data. Leave the paper.

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



Mobile Capture

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



Document Archiving

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



Accounts Payable Automation

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



Mailroom Automation

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



Document Classification

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



Forms Processing

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

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

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Struggling to Get the Most from Your Data? It's Time for Cognitive Search

By Alexandre Bilger

All organizations are notorious for hoarding data. Whether it is research data, customer data, marketing data or another type of data, businesses are savvy to the power of data-driven insights and are keen to hold onto whatever data they can glean in case it could provide business value through analytics.

However, with so many datasets for different types of data, relevant data can quickly get lost in siloes, which makes it increasingly hard for employees to find the information they need to work smarter and more productively.

The trouble with that is that it is about to get a lot worse.

Unstructured data is taking over. Data is no longer only found in conventional structured Excel spreadsheets or Word documents, it is now present in a whole range of formats, from audio and video files, to slides from a webinar or a link in a Slack conversation. Unstructured data represents the majority of data used today, according to [IDC](#) and is expected to continue growing at a high rate.

Much of a company's structured data is seen as "dark," or untapped, because it is stored in multiple siloes and has poor tagging, making it increasingly difficult for search tools to find amid all the clutter.

What is cognitive search?

Enterprises that have large stores of dark data are already wondering how that situation will worsen as more unstructured data is created and stored. When a company's valuable insights are locked inside a plethora of formats which conventional search technology finds impossible to interrogate, it will be the businesses that have invested in cognitive search that will assume a competitive advantage.

Unlike the systems used by most enterprises today, cognitive search does not rely solely on tagging and keywords to match with what an employee is looking for.

Instead, the new field uses artificial intelligence to understand data and connect it with the people who need it. With cognitive search, an enterprise is not reliant on someone calling a file by the right name and saving it in the right format within the best folder on the correct server.

Organizations employing cognitive search to connect all content -- both text and data -- derive meaning, learn from user interactions and present information in context. This solves content chaos and informs employees through a single, secure interface. They get the knowledge, expertise and insights needed to make informed decisions and do more, faster.

This means employees always have the latest up-to-date information at their fingertips without having to try multiple searches which still fail to pick out the right data because it was not included in a tag or saved within a specific folder.

The inconvenient truth is that with existing mainstream search options, nobody knows what they do not know. If a search does not come back with the most relevant information, the staff member has no way of knowing there is a hidden finding or discovery that could greatly help their work. If your data is dark, your people are left to work in the dark, too.

How can enterprises gain from cognitive search?

This can mean different things to different industries and different roles. Customer services staff, for example, can spend less time trying to work out a customer's background or purchase history and quickly attend to issues with all the necessary facts at their fingertips.

In retail, customers get relevant recommendations based on what they have previously purchased and what the latest items are, in which size, and in which stores.

In healthcare and life sciences, drug discovery becomes accelerated when researchers have all the relevant data at hand. To get a sense of the scale of the problems these businesses face, some life science leaders are struggling to connect over 15,000 researchers to the insights stored away in more than 180 million documents, across multiple systems.

Similarly, leading financial service providers are finding it difficult to make sense of thousands of fund sheets produced each month and turn them into client insights.

With cognitive search, they readily have the insights they need and find value in additional unstructured data, which they previously could not leverage. This means queries are answered more quickly and better investment choices are spotted sooner for their wealth management clients.

In manufacturing, cognitive search can streamline processes and boost productivity. By putting the right information in front of the people who need it most, the average knowledge worker in the sector can save 18 hours per week, according to [IDC research](#).

Improving strategic decisions

All enterprises can make better strategic decisions when armed with insights from the dark data that they did not know they possessed. Not only does cognitive search unearth the hidden data and make unstructured data searchable, but it also enables enterprises to boost employee satisfaction by giving people the tools to work smarter and more efficiently, rather than spending hours inefficiently trying to find the information they need to do their jobs.

With the expected growth of unstructured data that leading enterprises will have to decipher and glean insights from in the future, it becomes clear that AI-driven search is the key to improving efficiency and boosting innovation.

Alexandre Bilger is the president and CEO of intelligent search platform vendor, [Sinequa](#). Prior to joining Sinequa, Bilger co-founded and served as CTO for E-Front, a data-processing software vendor specializing in the financial industry.

So, What is a Page Anyway?

by Sujith Parakkunnath, Infrd

All Intelligent Document Processing begins with a document -- a collection of one or more pages. Pages form the basis of all the processing that the IDP platforms perform to make sense of data.

Though most of the focus of 'intelligence' in IDP refers to how you make sense of data, you will be surprised how much intelligence is used on a page before it is ready for data extraction. I am not talking about things to do with scan quality such as your skew correction, resolution improvements or shadow removal, etc. I am talking about things to do with the basic anatomy of a page. Stuff that begs the question, "What is a page, anyway?"

A page is a page but it can get tricky. People who handle pages physically know what I am referring to. Sometimes, a single page can have multiple pages on it; sometimes, multiple pages have a single information unit spread on it; at times, you bump into filler pages or pages show up blank; sometimes random pages are put together in a 1,000 page document. Let's look at the nuances of each scenario.

Multiple 'pages' on a single page

You just got back from a short business trip and now you need to file your expenses. You have a coffee receipt, a taxi bill, a dinner receipt, and a boarding pass. Instead of taking individual pictures of all of these, you lay them out next to each other and take one picture. You have now produced 'a page' for document processing. However, an IDP platform first needs to split this one page into 4 before it can move to the next step.

Here's another example -- you have multiple assets: two cars and a bike that are insured with an insurance provider. When you get your proof of insurance, it lists all three collaterals on a single page. An IDP system first needs to split this one page into 3 collaterals and then process each of them separately.

Consider a bank statement -- if you have multiple accounts with a bank, the summary page includes all of your accounts along with their balance on a single page. IDP systems need to treat these as separate accounts and extract information from each individual account.

To process these kinds of pages, your IDP system needs to have the intelligence to split a single page into multiple pages and then process them for you. Our page segmentation model handles these documents using a combination of state-of-the-art computer vision, natural language processing (NLP), and predictive analytics algorithms.

The March of the Pages

The second pattern that we see a lot for large mailroom processing operations is that all the documents received in a day are scanned together into one giant document that is a few thousand pages long. It makes the whole operation very efficient and saves a lot of time required to sort each document.

Before the IDP platform can pick this up, it needs to understand where one document ends and a new one starts. In the past, vendors would have to ask customers to insert a blank page between every document within this giant scanned file. Today, we use our Page Continuity model to figure this out and automatically split a 1,000 page document into 200 documents.

Once that is done, we use our Intelligent Classification model to figure out that pages 1-3 are part of a single invoice, pages 4-5 are also another invoice but a new one, page 6 has multiple receipts on a single page, and so on.

Once the documents are split and understood, they are routed to the right extraction models and appropriate data processing teams for review and corrections.

Multiple Pages That Make a Single Page

When processing visual information elements such as tables, we come across information that spans multiple pages. In this case, the IDP system needs to form a composite page from multiple pages and then extract information as a single information unit. Our page stitching models process these pages, remove information repeated on multiple pages, and form a single object for extraction.

Blank Page

And of course, sometimes you come across a blank page in a document that does not add any value to extraction. These pages need to be removed from the documents for processing. We do this using our blank page detection model.

So, What is a Page?

As you can see, a page is not really a page. It can be multiple pages disguised as one page or one page that should have been multiple pages. It can also be a group of random, unrelated pages grouped together for convenience.

Your IDP system needs to have the right intelligence to efficiently handle these scenarios, to ensure you do not waste time in managing tasks that AI can automate for you.

<https://www.infrd.ai/>

An AI-enhanced system to help doctors handle an EHR

Electronic health records (EHRs) have been widely adopted with the hope they would save time and improve the quality of patient care. But due to fragmented interfaces and tedious data entry procedures, physicians often spend more time navigating these systems than they do interacting with patients.

Researchers at MIT and the Beth Israel Deaconess Medical Center in Boston are combining machine learning and human-computer interaction to create a better electronic health record (EHR). They developed MedKnowts, a system that unifies the processes of looking up medical records and documenting patient information into a single, interactive interface.

Driven by artificial intelligence, this “smart” EHR automatically displays customized, patient-specific medical records when a clinician needs them. MedKnowts also provides autocomplete for clinical terms and auto-populates fields with patient information to help doctors work more efficiently.

“In the origins of EHRs, there was this tremendous enthusiasm that getting all this information organized would be helpful to be able to track billing records, report statistics to the government, and provide data for scientific research. But few stopped to ask the deep questions around whether they would be of use for the clinician,” says David Karger, professor of computer science in the Computer Science and Artificial Intelligence Laboratory (CSAIL) and senior author of the paper.

“I think a lot of clinicians feel they have had this burden of EHRs put on them for the benefit of bureaucracies and scientists and accountants. We came into this project asking how EHRs might actually benefit clinicians.”

The research was co-authored by CSAIL graduate students Luke Murray, who is the lead author, Divya Gopinath, and Monica Agrawal. Other authors include Steven Horng, an emergency medicine attending physician and clinical lead for machine learning at the Center for Healthcare Delivery Science of Beth Israel Deaconess Medical Center, and David Sontag, associate professor of electrical engineering and computer science at MIT and a member of CSAIL and the Institute for Medical Engineering and Science. It will be presented at the Association for Computing Machinery Symposium on User Interface Software and Technology next month.

A problem-oriented tool

To design an EHR that would benefit doctors, the researchers had to think like doctors.

They created a note-taking editor with a side panel that displays relevant information from the patient’s medical history. That historical information appears in the form of cards that are focused on particular problems or concepts.

For instance, if MedKnowts identifies the clinical term “diabetes” in the text as a clinician types, the system automatically displays a “diabetes card” containing medications, lab values, and snippets from past records that are relevant to diabetes treatment.



Most EHRs store historical information on separate pages and list medications or lab values alphabetically or chronologically, forcing the clinician to search through data to find the information they need, Murray says. MedKnowts only displays information relevant to the particular concept the clinician is writing about.

“This is a closer match to the way doctors think about information. A lot of times, doctors will do this subconsciously. They will look through a medications page and only focus on the medications that are relevant to the current conditions.

“We are helping to do that process automatically and hopefully move some things out of the doctor’s head so they have more time to think about the complex part, which is determining what is wrong with the patient and coming up with a treatment plan,” Murray says.

Pieces of interactive text called chips serve as links to related cards. As a physician types a note, the autocomplete system recognizes clinical terms, such as medications, lab values, or conditions, and transforms them into chips. Each chip is displayed as a word or phrase that has been highlighted in a certain colour depending on its category (red for a medical condition, green for a medication, yellow for a procedure, etc.)

Through the use of autocomplete, structured data on the patient’s conditions, symptoms, and medication usage is collected with no additional effort from the physician.

Sontag says he hopes the advance will “change the paradigm of how to create large-scale health datasets for studying disease progression and assessing the real-world effectiveness of treatments.”

In practice

After a year-long iterative design process, the researchers tested MedKnowts by deploying the software in the emergency department at Beth Israel Deaconess Medical Center in Boston. They worked with an emergency physician and four hospital scribes who enter notes into the electronic health record.

Deploying the software in an emergency department, where doctors operate in a high-stress environment, involved a delicate balancing act, Agrawal says.

“One of the biggest challenges we faced was trying to get people to shift what they currently do. Doctors who have used the same system, and done the same dance of clicks so many times, form a sort of muscle memory. Whenever you are going to make a change, there is a question of is this worth it? And we definitely found that some features had greater usage than others,” she says.

The Covid-19 pandemic complicated the deployment, too. The researchers had been visiting the emergency department to get a sense of the workflow, but were forced to end those visits due to Covid-19 and were unable to be in the hospital while the system was being deployed.

Despite those initial challenges, MedKnowts became popular with the scribes over the course of the one-month deployment. They gave the system an average rating of 83.75 (out of 100) for usability.

Scribes found the autocomplete function especially useful for speeding up their work, according to survey results. Also, the colour-coded chips helped them quickly scan notes for relevant information.

Those initial results are promising, but as the researchers consider the feedback and work on future iterations of MedKnowts, they plan to proceed with caution.

“What we are trying to do here is smooth the pathway for doctors and let them accelerate. There is some risk there. Part of the purpose of bureaucracy is to slow things down and make sure all the i’s are dotted and all the t’s are crossed.

“And if we have a computer dotting the i’s and crossing the t’s for doctors, that may actually be countering the goals of the bureaucracy, which is to force doctors to

think twice before they make a decision. We have to be thinking about how to protect doctors and patients from the consequences of making the doctors more efficient,” Karger says.

A longer-term vision

The researchers plan to improve the machine learning algorithms that drive MedKnowts so the system can more effectively highlight parts of the medical record that are most relevant, Agrawal says.

They also want to consider the needs of different medical users. The researchers designed MedKnowts with an emergency department in mind - a setting where doctors are typically seeing patients for the first time. A primary care physician who knows their patients much better would likely have some different needs.

In the longer-term, the researchers envision creating an adaptive system that clinicians can contribute to. For example, perhaps a doctor realizes a certain cardiology term is missing from MedKnowts and adds that information to a card, which would update the system for all users.

The team is exploring commercialization as an avenue for further deployment.

“We want to build tools that let doctors create their own tools. We don’t expect doctors to learn to be programmers, but with the right support they might be able to radically customize whatever medical applications they are using to really suit their own needs and preferences,” Karger says.

This research was funded by the MIT Abdul Latif Jameel Clinic for Machine Learning in Health.



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What's in store for the world of Intelligent Automation in 2022?

By **Andy Mellor, ANZ Regional VP, Kofax**

With lockdowns and COVID-19 outbreaks continuing for much of 2021, organisations throughout Australia have had to navigate a variety of obstacles. It's safe to say hybrid workplaces are here to stay, creating new challenges for managing productivity and workflows. Meanwhile, companies are gearing up for 'The Great Resignation' whilst also struggling with attracting and retaining staff.

Then throw into the mix supply chain issues that don't appear to be easing anytime soon. Ensuring revenue growth and hitting performance targets has become a challenging task, and businesses need to look to upcoming tech trends, so they're primed for success in 2022 and beyond.

Firstly, companies need to lean on tech tools, such as intelligent automation (IA), to be prepared for what lies ahead in the new year. IA platforms powered by artificial intelligence can help a business in a variety of ways – including increasing revenue.

We've taken a deep dive into the top 10 ways IA, AI and data insights will guide Australian organisations in 2022:

1 Automation Drives Organisational Convergence.

As automation technology has converged, so too will business functions. IA platforms can merge different business functions under one device. This means those tasks can be headed by a single person to improve overall business productivity. IA technology is at the point where low-code devices have caught up with the marketing hype, and many technologies, in general, have become ubiquitous.

2 AI Becomes Mainstream.

Through the power of embedded artificial intelligence, organisations will achieve next-level automation. The beauty of AI-powered process automation means it can make pragmatic decisions that have historically needed a worker. With those tasks now automated, employees can move beyond transactional decisions and focus on high-value work. Through integration, companies will be able to focus on how technology solves business problems instead of on the technology itself. The built-in nature of AI—and its ability to get better and faster the more data it sees—accelerates how fast an organisation can achieve results.

3 Automation Takes Away Jobs?

The myth of automation replacing human workers will soon be dispelled. Employment opportunities are everywhere, and at the same time, technology is being used more than ever. Instead of taking over a job entirely, automation is increasing job satisfaction and improving the overall experience for workers. Automation can handle mundane work - creating upward mobility opportunities for people to perform higher-value work for higher compensation. Companies will focus on how they can use the technology to create a more supportive, collaborative and productive work environment. This will lead to greater retention at a time when seemingly everyone is evaluating their career options.

4 Everything Is the Next Big Thing.

Annual predictions tend to proclaim a particular technology

as “the next big thing.” Next year will be different as there's no obvious standout. The majority of automation technologies packaged within one central platform. However, we're expecting low-code intelligent automation to be in high demand. Success will require more than just automating processes to make them better; it's about transforming them into smarter workflows.

5 Taming Unstructured Data Is the New Competitive Advantage.

Like the past few years, organisations will continue to be bombarded by unstructured data. While data is known to be an asset, unstructured data is often forgotten. However, it can provide valuable business insights if dealt with correctly. Each company's data is unique, and the ability to harness information to provide actionable insights no one else can copy.

6 Cloud Will Open New Possibilities for Print and Productivity Needs.

Businesses need to implement frictionless digital touchpoints instead of brick-and-mortar experiences to ensure seamless workflows. Universal print will become even more prevalent, and more organisations will shift much of their printing needs away from individual devices and onto cloud-based servers. Workers will no longer be tied to laptops or big, on-premises devices to facilitate printing. Instead, through cloud capabilities built into intelligent document processing solutions, workers will have flexibility.

7 Integrated Supply Chains Call for Tech Investment.

Supply chain issues are extensive around the world due to COVID-19. In order to adapt, organisations will need to lean on technology to ensure seamless operations. Technology will provide businesses with insights into all areas of the company – highlighting potential bottlenecks and improving workflows.

8 Increased Data Protection.

Consumers will be able to take control of their own data. They'll be able to share what they want and will have greater visibility into what they are sharing. An example of this can be seen through Apple – they've allowed their customers to control their data's destiny. This control will provide comfort to consumers and compel them to share some instead of none, allowing organisations to provide personalised services whilst being compliant.

9 Blockchain.

The most noteworthy use of blockchain technology is cryptocurrency and Bitcoin. 2021 saw the explosion of nonfungible tokens (NFTs). However, the acceleration of distributed ledgers and blockchains is upon us for things more than cryptocurrency and pixelated monkey GIFs - like the secure sharing of medical information, intellectual property rights, and original content security.

10 Rise of Mixed Reality.

Mixed reality technologies will continue to become smaller and more affordable, providing greater collaboration in a hybrid work environment. While we have only seen early adopters jump on board, we're expecting this to grow significantly in 2022.

Businesses around Australia are looking to 2022 for a fresh start. Its important Australian businesses are ready for the new year with modern technology to combat any unpredicted obstacles on the horizon.



How to identify MS Teams sprawl

By **Brad Rosairo**

With the rise of remote work over the past 18 months, the use of Microsoft 365 and Microsoft Teams has exploded. Microsoft reports that roughly **50% of 365's 260 million-plus commercial users now use Teams**, although some experts place the number of users closer to 300 million.

However, with the global shift towards working remotely and the increased adoption of collaborative technologies like Microsoft Teams, this rapid growth has led to Teams sprawl among businesses and enterprises.

Often this sprawl occurs because companies don't have a governance plan in place. When left unmanaged, sprawl may result in significant problems for businesses, especially enterprise companies with thousands of employees. Additionally, during mergers and acquisitions, the problem is compounded when the parties look to consolidate data.

A firm understanding of existing data and whether it needs to be archived or deleted is essential for ensuring an optimal digital environment. Without proper IT planning and oversight, companies may soon find themselves backtracking to resolve an overwhelming issue of data sprawl.

What is Teams sprawl?

Essentially, Teams sprawl is the uncontrolled overflow of unused, outdated or duplicated and irrelevant data within Teams. It is often the result of a lack of administrative policies enforcing how to manage data or a lack of user training and understanding of how to use Teams.

Without proper policies, users may create single-use or rarely used teams or channels. Users may attach data to these channels, potentially saving files in multiple locations, leading to confusion and clutter.

In a company with thousands of users, business leaders must consider how they triage channels and teams, otherwise they can find themselves scrolling through countless channels within their Teams environment.

The problems

Suppose multiple versions of the same file exist in Teams. This can result in end users accessing outdated information or struggling to find the information they need, and if employees are unclear where to find what they need, it can result in miscommunication internally and with external partners or customers.

Users may then start saving documents on their local workstations, adversely affecting collaboration and making

it harder to find the most up-to-date file.

Dealing with Teams sprawl can also lead to considerable data security risks. Mismanagement of membership within work teams and channels may result in the wrong people having access to sensitive information, resulting in data leaks.

Consider the scenario where a user invites an external guest to an open channel. The guest might have access to internal information, or they could duplicate content, add it to a private channel, edit posts or delete data. It's critically important to monitor user activity and guest accounts that have access within a Teams environment.

The solutions

Companies can take a number of critical steps to mitigate sprawl, reducing the risk of serious problems.

First, identify stakeholders to oversee the management and enact governance policies for Teams. As part of this process, stakeholders should analyse the organisation's use of Teams, identify guidelines, and develop and implement a training plan.

For instance, they might create a 'tips and tricks' channel that is routinely updated with advice on new features, helping end-users to use the platform more effectively.

Next, on the business side, administrators will want to leverage Microsoft's native tools to limit the number of people who can create, delete and archive Microsoft 365 groups, govern naming policies, and manage other aspects such as group descriptions, membership, or even accessibility by geographic region.

They also can use these tools to create dynamic groups, which update group memberships automatically based on a person's identity, helping control access and improve network security.

Finally, they may want to establish team or channel moderators who receive notifications and provide additional guidance around the creation or proposed deletion of content. People with specialised knowledge are often ideal moderators because of their deep understanding of departmental needs.

With more businesses and end users adopting Teams every day, sprawl can seem like an inevitability. But it doesn't have to be. The trick is to be proactive in managing the platform and the data within it, so it doesn't careen out of control. With thoughtful planning and a focus on implementing governance measures, IT leaders can help businesses keep Teams data sprawl in check and their digital environments humming along efficiently.

Brad Rosairo is APAC Managing Director, BitTitan

What You NEED to Know Before Enabling Conditional Access Policies in Teams

By Sherian Batalliones, AvePoint

In the past year and a half, two of the buzzwords we've all been hearing constantly are "remote work" and "the cloud." Indeed, this is the new work ecosystem we find ourselves in, and people in industries around the world are seeing it unfold in realtime.

While productivity is still a priority in this new remote work setup, security has become even more crucial and difficult to monitor for admins. The security risks have increased and relying on identity governance is not enough.

Proper data governance would be critical to ensure sensitive data and the apps that are used to access them like Microsoft Teams - which has now become a hub where employees work and access data - are secure.

But while the combination of strong data and identity governance measures may protect your sensitive data from most of the risks in the cloud, setting up extra security measures like conditional access would benefit your overall security strategy even more.

What is Conditional Access?

A tool used by [Azure Active Directory](#), conditional access brings signals together to help you enforce organizational policies.

It's used to strengthen defences against suspicious identities by allowing you to control access to apps based on identity, location, and device.

In the simplest terms, conditional access policies allow you to block or grant access to certain resources and apps depending on whether a user or a device satisfies certain conditions.

Below are certain policies commonly used:

- Requires multi-factor authentication
- Requires device to be marked as compliant
- Requires Hybrid Azure AD joined device
- Requires approved client app
- Requires app protection policy (preview)

The Integration of Microsoft Teams with SharePoint and Exchange Online

But while applying conditional access policies sounds easy enough, the integrations between Microsoft 365 apps make things more complex.

Microsoft Teams is supported separately as a cloud app in Azure Active Directory conditional access policies.

But as you probably well know, Microsoft Teams is deeply integrated with SharePoint Online and Exchange Online.

This integration makes it hard to enforce consistent policies with transparent result, like when you need to grant access to Teams but access to shared resources from SharePoint must be blocked.

But what you need to understand is that [SharePoint Online](#) and [Exchange Online](#) are the underlying platforms that support Teams.

That means whatever policy you set up in both cloud apps would apply to Teams once a user signs in. In contrast, policies set up in Teams might not reflect on SharePoint Online and Exchange Online.

For example, if you set up multi-factor authentication for SharePoint Online and a user wants to access resources in your SharePoint Online environment through their Microsoft Teams tenant, they will also be subject to the MFA policy.

To Ensure the Targeted Results, Consider Setting Policies on Microsoft 365 Instead

The complexity of these integrations may push you, though unconsciously, to set inconsistent policies across the apps.

This will then create gaps where certain resources will be accessed without your consent.

To prevent this from happening, setting consistent policies across related apps and services will help solidify your security strategy.

To make this possible, Microsoft recommends using the Microsoft 365 suite to target the services all at once and avoid issues with the cloud apps' service dependencies. Administrators should assign policies to the Microsoft



365 app to ensure all metadata is protected across apps and their dependencies.

Strengthen Your Conditional Access Policies With Intune

Once you have a consistent policy map planned out, automation will now be key to strengthen your policies without sacrificing productivity in the name of security.

[Microsoft Intune](#) can be used and integrated with Azure AD to strengthen your security space.

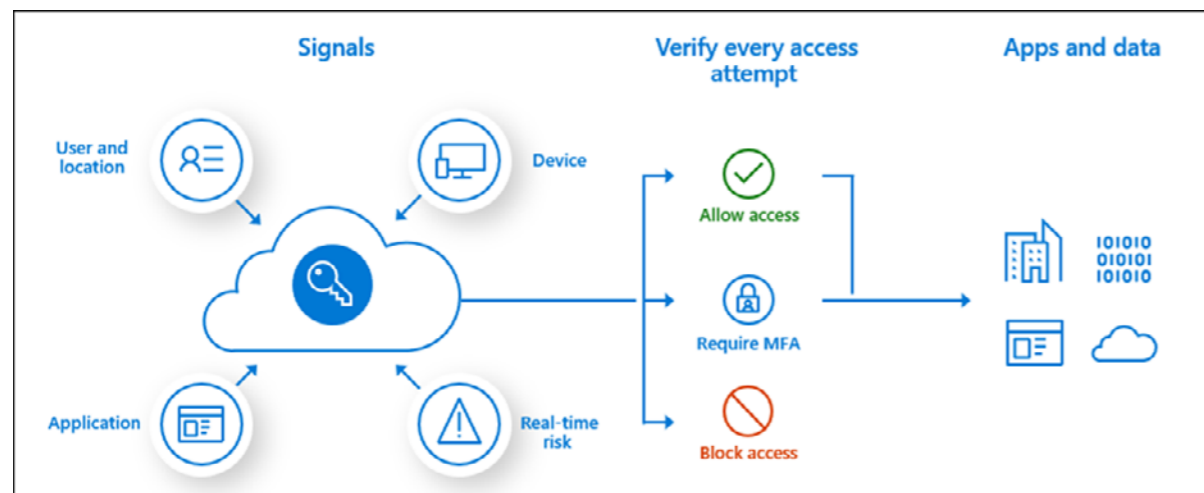
By utilizing Intune, you can automate your policy settings and add additional security measures to your access settings without the heavy burden of constant monitoring to your IT team.

Closing

Microsoft has many security offerings that can help you plan your defence against the risks in the cloud. Understanding how each of them works should help you as an admin prepare better for securing your organization's security needs.

Mapping out your security strategy also means enhancing what Microsoft offers with third-party tools, like [AvePoint's Cloud Governance](#), which can help reduce the burden of your IT team and make security much less complex for you as an admin.

Originally published [HERE](#)



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Why a one size fits all approach to data classification won't deliver in an era of enhanced regulation

By Adam Strange, HelpSystems

In 2018 the European GDPR irrevocably changed the whole data privacy landscape. Since it was implemented, there have been a host of other privacy regulations such as CCPA, CMMC, and India PDP, coming into force around the world.

In fact, just a couple of weeks ago the Colorado Governor signed the Colorado Privacy Act (CPA) into law, the latest in the recent wave of state privacy legislation in the US and unlikely to be the last.

The CPA will take effect July 1, 2023, six months after Virginia's Consumer Data Protection Act (CDPA) and the California Privacy Rights Act (CPRA) become effective.

Following the implementation of such data protection and privacy regulations, there have been plenty of high-profile cases and fines issued.

This further underpins the need to ensure sensitive information is handled in the correct manner and reinforces that this is a government requirement that organisations can no longer ignore.

For example, in 2021 [British Airways settled a legal claim](#) from some of the 420,000 people affected by a major 2018 data breach. The breach affected both customers and BA staff and included names, addresses, and payment-card details.

The UK Information Commissioner's Office handed BA its largest fine to date - £20m - over the «unacceptable» failure to protect customers.

Understanding what data you have

As a result, organisations are shoring up their data protection policies and procedures with a plethora of solutions, and [data classification](#) is often viewed as the foundation to any data protection strategy.

This is because a data classification policy will help organisations understand what data is sensitive, who should have access to it, and whether they should be holding, archiving, or deleting the information.

According to analyst organisation Forrester Research, "If you don't know what you have, where it is, and why you have it, you can't expect to apply the appropriate policies and controls to protect it."

Additionally, Gartner advises organisations to "Focus on controls that broadly address the problem, such as implementing people-centric security and data classification. These controls are the foundation upon which additional controls can be built."

However, in today's growing threat landscape, and as a result of expanded business ecosystems, there is no one single solution or silver bullet that can fully protect your data.

Data-centric security requires a layered approach to provide comprehensive data protection where you need it most. In conjunction with data classification, powerful security solutions such as [data loss prevention](#), [email security](#), [secure file transfer](#), [encryption](#), and [digital rights management](#) help to create a more robust data protection strategy.

Why a "one-size-fits-all" solution isn't enough

That said, there are vendors who advocate and offer a "one-size-fits-all" solution. Most of these solutions typically provide basic classification functionality, such as labelling, but more often than not, especially in an era of enhanced regulation obligation, most organisations now need a more granular classification approach.

Take Microsoft Information Protection (MIP), which is aimed principally at applying Rights Management rules to individual pieces of data and a heavyweight application of encryption techniques.

MIP provides a level of data classification which may well be entirely satisfactory for meeting certain legislation or for businesses that are outside highly regulated industries.

However, as many organisations are now finding out, modern day data protection legislation, especially as new and evolving regulation continues to be introduced, typically requires enhanced or combined functionality to remain compliant.

For example, labelling with MIP has its limitations and it therefore makes sense to integrate a best-of-breed classification solution that works with MIP to hit the higher expectations of the regulators.

Likewise, protecting data costs money so it is vital to create a solution which delivers the right approach and helps organisations to differentiate between data that requires a high level of protection and other, less critical data pools that do not.

Treating all data equally, as if it was all the Crown Jewels, and using RMS to encrypt and apply post-delivery controls because there simply isn't a reliable method of assessing an individual data file's value, is expensive and inefficient.

Taking a more granular approach to data classification

We have seen how compliance is a growing challenge.

"... in today's growing threat landscape, and as a result of expanded business ecosystems, there is no one single solution or silver bullet that can fully protect your data."

Taking a more granular approach by combining a data classification solution that can provide the foundational expertise, together with the regulatory knowledge necessary to accurately deliver the data security required against all the different data categories, is also becoming essential.

Above all, organisations should choose a solution that is powerful, flexible and can grow with the business as requirements change and classification policies adapt in response. More basic solutions may limit future flexibility.

Given the pivotal role of data classification, it is critical that any classification technology can integrate and interoperate with a wide range of complementary security and data management solutions.

This ultimately means that businesses need both coverage beyond basic Office applications and a solution that takes into consideration not just the regulatory requirements, but also the essential business requirements for internal and departmental use.

Comprehensively classified documents enhance performance of these downstream security tools, enforcing controls, reducing false positives and providing an audit trail for regulators.

Looking at the bigger picture

Overall, it is important that organisations look at the bigger picture when thinking about their requirements. This means adopting a solution that not only delivers a fully customisable experience and ensures data is protected exactly how it needs to be to maintain regulatory compliance, but a solution that also has the agility and responsiveness to change as customer demands evolve.

Here at HelpSystems, we have over 35 years' experience in working with customers to rapidly develop software products that meet both their exacting needs and those of an increasingly demanding regulated marketplace.

The good news is that Titus data classification is fully compatible and interoperable with MIP, adding significant value to the labelling, meaning that organisations can incorporate elements of MIP and enhance that functionality with Titus.

By combining the best of a mass-market product in MIP, incorporating Azure RMS and best-of-breed classification in Titus, this provides organisations with significant additional value from a premier classification capability.

Taking a combined approach to enterprise information protection with enhanced data classification at the core enables policy issues and integration requirements to be tackled together to deliver maximum value for the business - ensuring that organisations meet their classification challenges not only today, but also for those that will be introduced around the corner.

If you are interested in reading more about why you need best-of-breed data classification, why not download our paper: [Enterprise Data Classification - Enhancing Microsoft MIP in An Era of Regulatory Obligation](#).



Automating the Right Processes: Task Capture vs Process Mining?

By Tony Higgins

The growth of robotic process automation (RPA) over the past few years has been one of technology's great success stories. A recent Gartner announcement on the state of the market indicates that spending on RPA software is likely to surpass \$2.4 billion in 2022. At that pace, 85% of large and very large organizations will have deployed some form of RPA by the end of next year.

On the face of it, RPA's huge popularity makes perfect sense. Properly executed, RPA is able to automate a wide range of repetitive, rules-based processes, vastly reducing the time spent on routine tasks, as well as the potential for human error which often accompanies such work.

More importantly, RPA significantly improves productivity and drives innovation by freeing up employees to bring their creativity and problem-solving abilities to more meaningful work.

While there is no denying RPA's success – Deloitte has predicted automation initiatives will hit almost universal business adoption in the next 2-3 years – many companies complain that it has failed to deliver on its lofty promise.

Near constant break-fix cycles leading to automation downtime and the inability of vendors to deliver on the ease of execution have inhibited the ability of many users to effectively scale their RPA initiatives. This, in turn, has impacted anticipated returns in productivity and profitability.

Although the blame for RPA failing to reach its full potential can be traced to numerous causes, a prime culprit may be automating the wrong processes. To be truly effective, RPA relies on automating those processes which showcase its strengths.

These typically are processes that rely on clearly identified, predictive business rules, occur frequently, and have structured, readable output (such as an Excel

spreadsheet). Processes with little or no exception rates that require rekeying data across multiple systems also represent good candidates for automation.

Bottom line: If companies implementing RPA choose to automate the wrong processes, it simply means they will be making the same mistakes as before, just faster. For that reason alone, it is essential for organizations to capture and analyze their existing processes before jumping into any automation initiative.

Only by taking the time to properly capture processes can a business make an informed decision about where RPA can best be deployed. Doing so also makes a data-backed business case for spending on automation.

To that end, many organizations are turning to either task capture or process mining software to help them identify which processes are best to automate. Unfortunately, that raises another question. While these businesses recognize they need help, which software tool is right for them?

Task capture software, as its name suggests, focuses on the numerous actions ("tasks") performed to execute a specific step in a business process. Originally, this was done by having a business analyst sit with employees to monitor their work tasks, ask questions, and then map the results.

While potentially effective, this approach was time intensive and depended in large part on a sound methodology, an analyst with the right skill set to elicit needed information, and employees' willingness to participate.

Task capture software replaces the human analyst with an automated recorder which captures employee interactions in the different applications they use, taking screenshots and recording data such as keystrokes, clicks, data entry, etc. This is then combined with context recognition to uncover the low-level details of how specific tasks are executed.

Ultimately, all of this information is compiled into a package that serves as a guide for RPA developers to automate those tasks and increase operational

efficiency, reduce errors, and improve employee engagement.

Beyond fast-tracking the automation process, task capture software enables users to build a complete database of task and process documentation that captures even the most complex workflows.

That institutional knowledge can then be shared in a way that aligns the work of business analysts with RPA developers and informs future developments.

Process mining software, on the other hand, targets business processes – any cluster of related, structured work in which a specific sequence of activities produces a product or service for a particular customer. Processing an invoice, for example, is a business process.

In traditional business process management, process mining monitors and analyzes existing processes via interviews and workshops, resulting in an idealized picture of a process.

Process mining software automates this procedure, using tools to investigate data stored in the enterprise systems' event logs – including software logins, interactions in that software, and logoffs – to discover and present end-to-end processes that an organization is performing to complete work.

Typically, these digital footprints are combined with powerful analysis techniques to present the process that has been successfully mined along with process variants and suggestions for optimizing and automating.

The benefits of process mining software include its ability to survey and analyze processes across the entire enterprise comprehensively and accurately, target bottlenecks and inefficient processes, and drive compliance and continuous process and efficiency improvements.

Ironically, process mining's greatest strength – its ability to mine and present a lot of data – is also its apparent weakness. Process mining can produce such an overwhelming amount of data that it may require the support of data scientists to make sense of it all.

It also tends to be expensive, particularly when compared to task capture software which is both cost-effective and offers the kind of precise, detailed information businesses can use to drive transformative initiatives.

Given that, if an organization has the right governance framework and budget in place and its primary goal is to discover end-to-end business processes, then process mining software might be the preferred option.

If a company is trying to uncover the tasks its employees perform to improve workforce efficiency, identify additional automation opportunities, and get a better grasp of current processes, however, task capture software probably makes more sense.

Because many of the automation opportunities identified by task capture are less complex than those captured through process mining, they represent good candidates for citizen designers and as such, are ideal for organizations which are also concerned about a more cost-effective, user-friendly approach.

Tony Higgins is the Chief Product Officer at Blueprint Software Systems and is responsible for the vision and evolution of Blueprint's Enterprise Automation Suite, a powerful digital process discovery, design and management solution that enables enterprise organizations to capture, identify, design, and manage high-value automations with speed and precision in order to scale the scope and impact of their RPA initiatives.

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3 common process automation mistakes (and how to fix them)

By Jakob Freund

Like their cloud-native counterparts, many large or long-standing enterprises aspire to automate as much of their operations as possible. As a result, many of them get overly ambitious with their process automation goals, and attempt to roll out sweeping, company-wide digital transformation initiatives. While ambition is a good thing, many of these initiatives take years to complete, and often require ripping and replacing legacy systems.

Few organizations consider that end-to-end process automation takes a change in mindset that spans people, processes and technology. Let's take a look at three of the most common process automation mistakes, and how organizations can work together to fix them.

Rolling out strategic automation initiatives too fast is the first. While there's nothing wrong with being strategic, thinking on too large of a scale is a common pitfall of overly ambitious automation projects.

Taking on too much strategic work too early runs a high risk that the organization doesn't see any business value

for a long time. As a result, developers will most likely get completely stuck in shaping a complex platform without understanding its use case.

Instead, try to break down larger strategic initiatives into component parts, starting with the most urgent or important projects first. Here's one way to approach it:

■ **Start with Pilot Project:** The goal of this project is to define and validate both architecture and stack. Very often, this pilot project is set up as a proof-of-concept (PoC). However, it is important to go-live with that pilot to really learn about all aspects of the workflow solution throughout the full software development life cycle (SDLC).

■ **Accelerate to a Lighthouse Project:** Soon after running a successful pilot, you should tackle a lighthouse project. This project should have a broader, but still realistic scope which can be better leveraged to show off architecture, tooling, and value of workflow automation to other people and teams within your organization.

■ **Progress to Broad-Scale Transformation:** Leverage the lessons learned from the lighthouse project, empowering the people on that project team to run a Centre of Excellence (CoE) to break down silos across teams and drive organization-wide change.

I call this approach "the art of gradual transformation." Ideally, before approaching a large-scale automation project, try to map out the entire ecosystem of processes — including the people, systems and devices at work in the background. Start by modernizing high impact processes that affect customers the most. Then design a transformation approach that fits the business' or customers' needs, rather than your technology stack's requirements.

Handling Automation Projects in Silos

Even though a gradual transformation approach is recommended, it does not mean "siloed" or without structure. If each team chooses its own tools, it can be hard to effect organization-wide change, or end-to-end process automation. Technology decisions are a commitment for years and sometimes even decades. These decisions and the resulting maintenance affect more than just the current team in the trenches.

As mentioned above, a CoE approach can help break down organizational silos and share best-practices on what has worked or not worked in previous automation projects. Ideally, this group does not dictate arbitrary standards, but maintains a list of approved tools and frameworks that can be reused across the entire company.

Beyond tooling alone, a CoE can also maintain start guides, project templates, and reusable open source components/libraries for teams to leverage. In addition, they can serve as advocates for automation, by running a community to raise awareness for new automation initiatives within the company. Within this framework, more teams can get inspired by the potential for automation within their departments.

Failing to Embrace Microservices Architectures

One important factor to address is the way software is built within the company. Embracing a microservices architecture in a legacy company is easier said than done. Often, there are legacy systems in place that are difficult to unseat.

By one estimate, there are still more than 200 billion lines of [code written in COBOL](#), a decades-old programming language. A wholesale replacement of these systems could cost upwards of \$US4 to \$US8 trillion (or more).

That's where the gradual transformation approach comes into play. For example, many companies have surface-level automations in place with RPA implementations sitting on top of legacy systems (like those written in COBOL). A good approach for these scenarios would be to go through a modernization in three main stages:

Orchestrate all of these RPA bot-driven local task automations along the end-to-end business processes

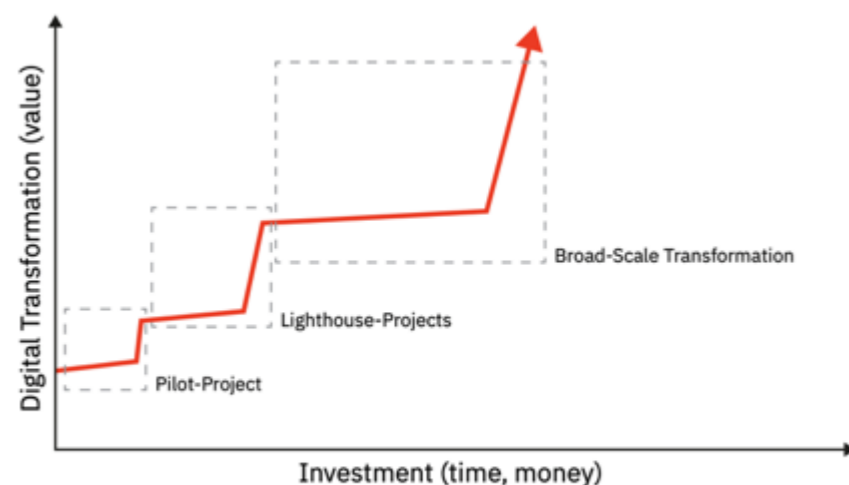
Sunset these bots one by one in order of priority

Invest in rewriting the underlying business logic as microservices, which can again be orchestrated along the end-to-end business processes.

The advantage of a microservices-based automation workflow is that it allows for a decentralized architecture where each team "owns" its own isolated processes. In the event something goes wrong with a single process, it can be easily controlled and fixed. From there, a process engine can "drive" these microservices-based processes across the organization, and unify them where it makes sense.

To sum up, end-to-end process orchestration can't happen in a vacuum. Stakeholders from across the organization should be involved, and projects should start small. Without a clear pilot project, large-scale, strategic automation efforts can easily fail to prove their business value. By working together to define priorities, create best-practices, and roll out the technological changes needed, organizations can ensure that end-to-end process automation happens successfully.

Jakob Freund is CEO at Camunda, a business process management solution provider.



The customer success path illustrated.



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

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



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FileBound Solutions offers cloud-native, work automation and document management solutions that can be used to underpin any organisation's digital transformation program. These solutions are based around the FileBound software platform and are able to be deployed in organisations of all sizes. The solutions can include capture, document management, workflow, electronic forms, analytics, mobile access, advanced business system integration capabilities and much more. Solutions from FileBound Solutions deliver organisational efficiencies, drive out manual paper-based processes to decrease costs, increase productivity and support compliance with internal and external mandates.

FileBound Solutions customers have the flexibility to create a variety of solutions from complex AP automations to simple document archival and retrieval processes.

Jina AI Raises \$US30M for Neural Search platform

Jina AI, an open-source neural search company based in Berlin, has announced \$US30 million in Series funding. All of Jina AI's investors are betting on the future of search being built on neural networks. The company, only founded in February 2020, has already raised \$US39 million in total.

"Traditional search systems built for textual data don't work in a world brimming with images, video, and other multimedia. Jina AI is moving companies from black and white into colour, unlocking unstructured data in a way that's fast, scalable, and data-agnostic," said Joydeep Bhattacharyya, general partner at investor firm Canaan.

"The early applications of its open-source framework already show glimmers of the future, with neural search underpinning opportunities to improve decision-making, refine operations and even create new revenue streams."

Coined "neural search," businesses to build search solutions that leverage actionable insights from unstructured data to make more effective business decisions. With Jina AI's core project, *Jina*, which is being built in the open on GitHub, users can create a cloud-native neural search solution powered by deep learning in a matter of hours, which is well-suited to business environments that require a fast and lightweight development cycle.

The company recently released another product called *Finetuner*, which lets users tune a neural search system to their enterprise's unique needs.

Today, Jina AI has a developer community over 1,000 strong and has seen widespread adoption of its Jina framework, enabling neural search applications for use cases as diverse as 3D assets for gaming content production, images on e-commerce sites and a Q&A chatbot that understands hybrid queries.

Interestingly, many applications built on top of Jina do not have (or need) a classic search box. For example:

One fast-growing video game developer embeds Jina in the right-click menu of their 3D game editor, helping game developers auto-fill game assets for the current scene.

Another European legal-tech startup uses Jina to enable a question-answering experience on their millions of PDF documents, enabling them to pinpoint the crucial facts and terms via chatbot.

"In just a few years, neural search will become such a fundamental technology that all software will require it. It will be as common as the "find and replace" feature in today's software," said Dr. Han Xiao, founder and CEO of Jina AI.

"We're helping developers and businesses to get ready ahead of the curve. The most exciting part of neural search is that it creates new ways to comprehend the world and opens doors to new businesses."

The new funding will be used to continue research and development on new product categories in building Jina's neural search ecosystem, and to ensure the best user experience in production for Jina AI.

<https://jina.ai/>

EzeScan introduces Intelligent Capture for NetDocuments

Effortlessly capture and store your matter documents with EzeScan automated intelligent capture solution for NetDocuments. With its native integration, EzeScan's enables documents to be captured and registered seamlessly into NetDocuments, all without the need for any additional scripting or customised coding.

EzeScan can help you streamline your legal workflows and get your matter documents to your legal team faster, by converting your manual processes into highly automated digital workflows.

Integration Benefits:

- Intelligent capture and registration capabilities for all your staff.
- High volume batch capture for large case files from any copier or desktop scanner.
- Automated naming and filing of documents into NetDocuments.
- Drag and drop documents into our web interface for QA, validation, registration, or workflow on any device, anytime, anywhere.
- Inbuilt lookup functionality with NetDocuments to easily apply matter and client metadata.
- Scan and upload documents into NetDocuments from the front panel of your MFP.
- Generate barcode coversheets from matter information within NetDocuments.
- Apply or inherit Meta Data and permissions when uploading to NetDocuments.

Save valuable resources and limit unnecessary data entry and manual processing by leveraging your existing client and case information already in your line of business applications.

By extracting/capturing the matter number from correspondence, EzeScan can perform validation lookups from within NetDocuments, or other line of business systems, to return the rest of the relevant information required to register new records, even creating folder structures or inheriting Metadata from parent folders along the way.

EzeScan provides scanning, image enhancement, data capture, validation, and upload automation. All designed to limit the amount of user intervention and help you ingest your information faster, so that you can meet the needs of you clients faster.

EzeScan allows NetDocument users to capture documents with on premise hardware and upload to NetDocuments cloud environments. Centralized and decentralized deployments options ensure that all your staff have access to the tools they need.

EzeScan provides flexible licensing options, scalable modular design and the ability to work with any desktop scanner, MFP or network capture device.

Learn more about our solutions on the NetDocuments marketplace: <https://nd.secure.force.com/appdirectory/>

Watch a Video Highlights Reel [HERE](#)

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FileBound V8 roars into view

What are the main reasons to be excited about the latest Version 8 Update to the FileBound document management and workflow solution? We asked Australian reseller FileBound Solutions to list the top new features and why they make a difference.

1 Forms go anonymous to enable customer interaction automation

FileBound has added two new authentication methods for the FileBound Forms portal, Anonymous and Anonymous with Password. These methods, which allow an organisation to interact with users outside of their current user base, combine with the updated FileBound workflow engine to deliver automation and digitisation of customer facing work processes.

2 The HelloSign Integration reaches maturity

The HelloSign integration is now completely automatable. An organisation can use the FileBound workflow to drive all work processes that include the need for requesting and accepting digital signatures. This allows for full automation of client signing processes. The integration is also now enabled in all the FileBound document viewers.

3 Back-end improvements that empower front-end capability

In this release, everything about how numeric fields work has been rewritten, and data structures rearranged to open up an entirely new level of configurability for this field type. These changes have allowed for new functions such as the ability to populate a numeric field using a live calculation.

4 Forms engineering improvements

FileBound V8 introduces form versioning for web forms. Mirroring the same version functionality as FileBound's workflow engine, the versioning history is automatically retained as changes are made to any web form over time.

5 Control the data source

Organisations can now control how users add new files to FileBound by forcing them to use forms instead of the traditional Add Content page. This significantly improves the data validation and quality outcomes of the designed processes.

6 Improved workflow management capabilities

Users with the Workflow Assignment Management right can now update the due date of assignments and view and complete workflow assignments in the Web Viewer.

Other changes of note:

- The Rest API gets some additions with new Generate Web Form, Project Link and change user password endpoints;
- Reporting improvements to the Workflow Status Report;
- Document drag-and-drop into the viewer now opens the file creation screen, which will guide users through the process of creating a new file ensuring all the right document metadata is captured; and
- There is a new Web Viewer setting that allows users to zip documents when emailing, allowing for much larger document sets to be distributed using the email method.

For further details contact sales@filebound.solutions

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Acquia Passes IRAP Assessment

Acquia has successfully completed an Infosec Registered Assessors Program (IRAP) assessment, confirming that Acquia Drupal Cloud has achieved the Australian government security status of "Protected" on selected deployments.

The IRAP assessment, which was conducted by a certified third-party, ensures cloud services are secured with automated and comprehensive security controls for authorised use by the Australian government.

Based on open source Drupal, Drupal Cloud allows organisations to quickly and securely assemble and deploy digital experiences such as websites, portals, microsites and mobile apps. Australian government agencies can now deploy the version of Drupal Cloud which best matches their requirements to leverage scalability, elasticity and data sharing for near-instant, secure and governed access to their entire network of data.

Australian government agencies can now purchase Drupal Cloud via the AWS Marketplace. This provides substantial savings for agencies already using AWS to reduce paperwork and streamline the RFP process. Any purchase of Drupal Cloud via AWS Marketplace will apply toward each agency's cloud usage benefits.

Globally, Acquia's solutions and cloud platform technology in recent years have also achieved the following security levels: FedRAMP, ISO27001, SERVICE ORGANIZATION CONTROL (SOC 2) TYPE II, Federal Education Records Privacy Act (FERPA), HIPAA and PCI-DSS, and now IRAP accreditation.

<https://www.acquia.com>

Machine Learning in Data Capture

US firm ancora Software has filed a patent application for the way its ancoraDocs software can correctly identify data fields that must be captured from documents potentially distorted during the scanning process. ancora Software, Inc., is a developer of intelligent process automation solutions including Intelligent Document Classification and Advanced Data Capture

Soaring volumes of documents and data require businesses to find more efficient ways of capturing critical data from the documents they receive. For instance, processing and approving an invoice typically requires accounts payable staff to capture data such as the invoice number, the supplier's name and address, and the invoice amount and due date.

Legacy data capture systems work well on well-designed well behaving documents with pre-defined layouts for each document type and the correct identification of keywords such as 'Loan Number' and 'Co-Borrower' to determine the exact location of the data that must be captured.

These approaches to locating data often fail on badly designed documents or when vertical or horizontal shifts, noise, pre-printed lines, folds, or other distortions occur during the scanning process.

ancoraDocs uses patented technology to overcome the challenges caused by distorted images. The software

utilizes a machine learning approach which is able to capitalise on the information from already processed images to capture the data from yet unprocessed images of documents such as invoices, purchase orders, sales orders, bills of lading, remittance documents, and health claims.

ancoraDocs' patented unassisted and assisted machine learning algorithms eliminate the need for document capture templates or a long, complicated setup. ancoraDocs says it can be deployed in hours or days, not the weeks or months required for traditional document capture solutions.

<http://www.ancorasoftware.com>

Blue Prism taps into Machine Learning

Blue Prism has announced Blue Prism Decision, a product that allows process developers to easily integrate machine learning (ML) based decisions into their digital workforces without requiring data science expertise.

Blue Prism Capture v3 is another new enhancement, a solution that allows users to easily record an accurate process and rapidly generate an automation prototype. Together, the updates accelerate the adoption of digital robots and increase the scope of intelligent automation in the workplace.

Powered by ML, Blue Prism Decision allows organizations to go beyond basic robotic process automation (RPA) and target more complex human-like decisions such as issuing a refund or paying an invoice, with minimal effort and expertise.

One of the biggest obstacles in utilizing ML for intelligent automation has been the need for data science knowledge. Through Blue Prism Decision, business users can build and train ML models in minutes through active learning and auto-ML functionality. What's more, unlike ML models of the past, decisions from these robots are fully explainable for audit purposes.

Process developers can use the tool to easily and accurately record business processes and generate an automation prototype. The process can then be easily modified and quickly put into the process development flow. This reduces errors in process capture and improves workflows between the process developer and analysts, speeding automation time by up to 75 percent. The enhancements to Blue Prism's suite of intelligent automation solutions - Blue Prism Decision and Blue Prism Capture - remove automation roadblocks and unify people with their digital robots.

[On-Demand Webinar]

[Unleash The Power of 2: Your People + Intelligent Automation](#)

This Webinar explores exciting new innovations in robotic process automation (RPA) and intelligent automation, and how digital robots not only automate your back-office workflows but also complement, augment and interact with your human workforce by utilizing artificial intelligence and, machine learning, and active learning. All with the goal to help you accelerate the business value of automation. Guest speaker, Bernhard Schaffrik, principal analyst at Forrester, is joined by Terry Walby, chief executive at Blue Prism Ventures, and a panel of experts in the RPA industry.

CM integration for Government legal teams

Legal technology company Lawcadia and technology partner FYB have announced the release of a deep integration with Micro Focus Content Manager (formerly TRIM) in response to high demand by Government legal teams for streamlined, connected solutions that enable them to maintain compliance with records management legislation.

Lawcadia CEO and Founder Warwick Walsh said, "Legal departments in the Government sector are often restricted in their use of best-practice intake and matter management solutions because they must meet their legislated records management obligations."

According to Mr Walsh, General Counsels and their legal teams commonly rely on email, excel spreadsheets and clunky manual workflows, to manage new and current legal matters and documents whilst continuing to manually update and maintain an enterprise content management system.

"Government legal departments are at risk of falling behind the industry which is now embracing legal technology and efficiency measures like never before," he said.

"In collaboration with FYB, an award-winning Micro Focus technology partner, we have developed an integration with Content Manager, the leading provider of enterprise records and content management solutions to the Government sector in Australia."

FYB CEO Daniel Dawson said, "We are thrilled to have developed an integration that will help to solve significant frustrations experienced by Government legal teams".

"This integration enables Government organisations to tackle two challenges at once, the need to comply with mandated obligations, whilst also delivering the required level of efficiency and digital transformation for the legal function," he said.

Proudly built in Australia by FYB, the Lawcadia to Content Manager connector, named **Law2CM**, will provide Government legal teams with:

- Access to Lawcadia's intake, self-service, matter management, spend management, collaboration and document automation solutions;
- Automatic transfer of information and documents from Lawcadia into Content Manager with the right folder structure to meet internal requirements;
- An ability to access Content Manager folders and documents without leaving Lawcadia; and
- Assurance they are capturing and managing records in accordance with record-keeping and other compliance requirements, mitigating risk.

To learn more about the Lawcadia integration with Content Manager please visit [here](#).

fyb.com.au Lawcadia.com

Open Source Process Automation Platform

Bonitasoft has announced the launch of its new open-source digital process automation platform, Bonita.

The new version of the platform offers [an expanded set of features](#) to support Bonitasoft's low-code approach: to provide an open, extensible process automation platform that separates coding tools from modelling tools.

For example, Bonita applications are now composed of a set of extensions (connectors, REST API extensions, themes, actor filters) that can all be built externally to the platform, using the Bonita Software Development Kit (SDK) and managed in each application using Maven.

For developers, this means that they can use the Bonita SDK with their preferred tooling to build and import any extension. Testing for each extension individually is now possible, making Bonita projects more robust. And as the extensions are no longer bound to a specific Bonita project, they can be easily reused, adding to developer efficiency.

On the side for citizen developers, they are now free to use the drag-and-drop, BPMN-based modelling and design tools to model and add business elements to processes with no worry about interfering with the developers' work as the coding and technical development is done outside Bonita Studio.

"The Bonita process automation platform is ideal for cross-functional, multidisciplinary, agile 'fusion teams' with different levels of technical skills," said Miguel Valdes Faura, Bonitasoft CEO and co-founder.

Bonitasoft's new Customer Service Center was [developed in-house on the Bonita Cloud digital automation platform](#). The Customer Service Centre is the main communication hub between Bonitasoft and several very different types of end users of the Bonita digital automation platform.

Developers, system architects, business users and others needed a central place to quickly find resources such as Bonita updates, downloads, access to licenses, technical support, questions about "how to do" something, request for training or additional services, access to documentation, release notes, videos, and "what's new."

Further, the new Bonita release offers a solid set of customisable Bonita user applications for its different types of end users: internal application users like employees; external application users like customers; process and applications administrators; and platform administrators:

The Bonita Applications Directory, which shows the list of all the Bonita applications a logged-in user can access and use.

■ The Bonita User Application, accelerates development with a starting point for customized interfaces for any type of end user

■ The Bonita Administrator Application with all the resources process and applications administrators need to manage deployed applications

■ A Super Administrator application, with all the resources platform administrators need to manage the Bonita platform

The Bonita Community open-source edition includes all capabilities required to develop and deploy process automation projects and can be downloaded [here](#).

Capgemini completes Empired acquisition

Global consulting firm Capgemini has completed the acquisition of Australian Microsoft solutions provider Empired, bringing an additional 1100 consultants to the organisation, in Australia and New Zealand.

The acquisition bolsters Capgemini's ability to provide end to end services to clients across Western Australia and New Zealand, where Empired has a significant presence. Olaf Pietschner, CEO of Capgemini in Asia-Pacific and member of the Group Executive Committee, said, "Capgemini's extensive transformation expertise combined with Empired's strengths as a leader in Microsoft Azure and Dynamics 365 will open up the full power of digital transformation for our clients in Australia and New Zealand, to run their entire business in the cloud and realise value faster. We look forward to welcoming Empired's talented professionals to Capgemini."

This acquisition is Capgemini's fourth in the region over the past 18 months and supports its vision to achieve a leadership position in the Australian market across digital, data and cloud.

www.capgemini.com

Compu-Stor ISO 27001 Certification

Compu-Stor has been given ISO 27001 Certification by Bureau Veritas, an independent Testing, Inspection and Certifier. This certification provides an independent validation that Compu-Stor's Information Security Management System ensures the confidentiality, integrity, and security of company information.

Compu-Stor's core services focus on the management of information in both physical and digital formats. These include digitising customer records and enabling these to be stored & accessed via an online platform called 'CIMS' (Complete Information Management Solution), while also helping to implement efficient internal data workflows to maximise the accessibility of this information within organisations.

Established in 1987, Compu-Stor is a family-owned Australian business specialising in information and records management solutions and services.

<https://www.compu-stor.com.au/>

Insight AnalytiX 1.3 and ControlX 1.1

Data Dynamics, an Unified Unstructured Data Management vendor, has announced the release of Insight AnalytiX 1.3 and ControlX 1.1, offering organizations risk analysis of sensitive information residing in their unstructured data and a means to remediate.

Ransomware and rogue access to data continues to be a boardroom focus in every organization, with a need to proactively mitigate the risk across billions of data points within an enterprise.

Insight AnalytiX 1.3 expands on its risk analytics with easy-to-use templates that help define risk profiles and file classification via intelligent tagging. Combining identifying risk with data classification enables

enterprises to have a clear understanding of the risk that exists and an easy means of quantifying it.

"Insight AnalytiX 1.3 with a remediation workflow takes us to the next level of helping our customers with their Data Management. Not only can we help to identify files that include personal and sensitive information, but from a single pane of glass customers can now immediately address the identified risk exposures.", said Helen Johnson, CTO of Data Dynamics.

ControlX 1.1 empowers enterprises to proactively mitigate risk and drive data security remediation. ControlX 1.1 provides the ability to quarantine at-risk datasets, intelligently re-permission files, all while creating an immutable audit log powered by blockchain technology. ControlX is fully API driven and can be integrated into a workflow that reduces rogue data exposure and ensures effective access management. Audit logs on classified files provide compliance reporting for internal governance and external regulatory reporting.

www.datadynamicsinc.com

Corporate Reporting Best Practices ESG

EDM Council, a cross-industry trade association for data management and analytics, has released its first research report providing first-hand insights and recommendations for implementing best practices related to environmental, social and governance (ESG) data management for corporate reporting entities.

The report takes a close look at:

- Data management challenges firms face with reporting and disclosure of ESG data
- Who's responsible and accountable for ESG reporting
- Data management plans and strategies to support ESG reporting
- ESG data quality related to direct and indirect data sources
- Data management capabilities related to internal and external audit and assurance

ESG reporting is still in the early stages as standards and regulations develop and evolve. ESG reporting provides important information about a company's performance, risks, and overall strategy, and the resulting data is used by multiple stakeholders across the ESG Ecosystem, including investors, asset owners, regulators, customers, suppliers, and employees.

The focus on ESG, including carbon emissions, biodiversity, water consumption, employee health and safety, gender diversity, wage equality, child labour, and culture and ethics, creates a unique set of challenges due to the complexities associated with the underlying data, and the management of this data.

This paper was developed by the EDM Council's ESG Workgroup, which was formed in 2020 to investigate current data challenges across the ESG Ecosystem. The Workgroup approached the exercise by looking at the problem through the lens of a data professional in each constituent group – Corporate Reporting Entity, Data Aggregator/Research/Rating firm, Investment/Product Creation firm, and Asset Owner.

<https://app.smartsheet.com/b/form/45e8fb7e57844ff5bb39098733818e70>

App helps employees contribute to security

Empired has announced the launch of the Empired User Secure Score app, its latest addition to the cybersecurity toolkit for organisations, designed to help every individual contribute to the security of the organisation in which they work. While most organisations invest heavily in their cybersecurity in terms of training, software, and hardware to keep their digital assets safe, the reality is that every member of a business can contribute to the overall security posture, not just dedicated cybersecurity experts. According to Egress, [human error causes 93 per cent of all incidents and 84 per cent of all breaches](#).

Darren Christophersen, group general manager, modern work and digital, Empired, said, "One of the most damaging incidents that can occur in a modern organisation will likely happen away from the physical office either in a lounge, café, or airport lounge. This is known as user-induced cybercrime and occurs when a lost, unattended, or misused laptop or phone quickly escalates into a situation where bad actors are selling data to competitors, holding an organisation to ransom, or even logging on to start interfering with operations.

"The question for organisations shouldn't be how to stop hackers getting into staff devices, it should be how to train their staff to treat their devices like they're the keys to the company safe. And the answer is not simply more education or training. While the training may be successfully delivered, there is no way to tell if it is understood and acted upon, or if the risk profile is decreasing."

The Empired User Secure Score works alongside Microsoft Teams, combining decades of cybersecurity experience that Empired and Microsoft have accumulated to give organisations a bird's eye view of the level of security compliance from their team.

Empired's User Secure Score provides realtime views of individual users' security behaviours including scores, ranking, and suggestions for improvement. This moves cybersecurity awareness beyond the theory of education and lets organisations and individuals take control with real behavioural change right across the entire spectrum of operations including roles, environments, and geographies.

The Empired User Secure Score queries the Microsoft graph and other application programming interfaces (APIs) and then calculates a user secure score for a set of security measures and controls. The individual score is then presented to the user in Teams along with their team score average, and the organisation's average score. The app also provides the user with a list of controls they can implement to increase their score and step-by-step instructions on how to add these to improve their personal security score.

Darren Christophersen said, "Empired manages the Empired User Secure Score app as a service, implemented in a dedicated Microsoft Azure subscription in the data centre of the organisation's choice. As part of the service, Empired will continually add new measures and manage the underlying data structure. The organisation can access its snapshot easily at any time with Empired on hand to recommend what action to take to ensure that incomplete tasks are implemented.

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

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All in One PDF & Signature Editor

Foxit PDF Editor 11.2 now includes integration with Foxit eSign so users can create, edit and sign legally binding documents without leaving their PDF editor.

Foxit eSign provides full, legally binding and secure eSign workflow and makes it easy to create and sign digital contracts, agreements and forms to expedite business in a digital world.

With Foxit's electronic signature service now available within Foxit's flagship PDF Editor, today's workers can quickly and conveniently use a complete set of PDF editing tools including, form creation, redaction, page editing, and collaboration before sending and signing documents. All this can be done without having to access any additional applications.

Foxit PDF Editor 11.2 provides an all-in-one editing and signing platform with enhanced capabilities, including:

- Ability to efficiently collaborate on document creation
- Effectively review documents with team members, customers and clients
- Self-sign various types of documents, including business contracts, agreements, approvals, timecards, etc.
- Easily collect signatures from multiple contacts and manage the signature workflow
- Actively monitor the status of all documents and send reminders to collaborators

www.foxit.com/pdf-editor

Archive exponential data growth

FUJIFILM and the iRODS Consortium have announced a collaboration and integration creating a joint solution built upon FUJIFILM Object Archive software. This joint solution leverages the benefits of a tape storage tier, providing an automated archiving workflow for research, commercial and governmental organisations that require storing large - and in most cases rapidly growing - amounts of data.

With this solution, FUJIFILM Object Archive becomes a deep tier archive storage target while iRODS provides a data management platform for users who produce massive amounts of research and analytics data. FUJIFILM Object Archive software has been tested with the iRODS S3 plugin and now fully supports the AMAZON S3 abstraction that iRODS provides. In addition to regular S3 compatibility, FUJIFILM and the iRODS Consortium worked together to add functionality to the iRODS S3 Resource Plugin.

This new functionality will be available as part of the upcoming iRODS 4.2.11 release.

Moving appropriate data to the tape tier provides

the benefits of air-gap security and scalability while being very cost-effective and energy-efficient when compared to other storage media. Additionally, FUJIFILM Object Archive software supports the new, higher-capacity LTO-9 tape technology, making the solution potentially even more efficient, economical and scalable.

Hyland adds new content services

Hyland has launched its latest product enhancements and new solutions to support organizations' digital transformation.

The release includes the new Hyland Content Portal for OnBase in partnership with JADU; the new solution acts as an integrated portal for enhancing digital services and stakeholder experiences for AP departments, governmental agencies and higher education institutions.

The Hyland Content Portal connects to Hyland's content service platform with a modern, external-facing portal experience that provides online forms, document upload and tracking, workflow and reports - ultimately improving the self-service experience for vendors, constituents and students.

The portal can be implemented as a main portal solution or integrated directly into existing portals and websites. Other new functionality and solutions across the Hyland product portfolio include:

Hyland Healthcare Enterprise Imaging enhancements include an updated Acuo Admin Portal, which provides a zero-footprint, web-based UI that improves administrator experience, making quality control and admin workflows easier for their VNA. NilRead viewer enhancements include enhanced integrations with Epic video editing and patient portal enhancements.

Hyland's Alfresco platform now includes new and enhanced connectors for both Microsoft Teams and SAP Cloud, so customers can improve collaboration while creating a more integrated solution map.

The Alfresco platform also now includes support for Elasticsearch, enabling enterprise-wide search with improved scalability and index management.

Updates to Hyland's Nuxeo Platform offer improved user account security, gamification elements and additional reporting for Nuxeo Insight, the Nuxeo artificial intelligence solution that's trained on business-specific machine learning models.

Other Nuxeo updates include new and improved connectors to systems such as Outlook, Salesforce, Adobe Creative Cloud and more, while enhancements to Nuxeo Studio allow admins to more quickly and easily deploy new client projects.

Saperion customers also will see security improvements, a new web client viewer to optimize performance and admin experience, and an integration with OneDrive.

Hyland.com

EzeScan links with NetDocuments for Legal Workflow

EzeScan has announced a strategic partnership with NetDocuments, the cloud content management platform for legal professionals. This new partnership will enable firms to develop a seamless integration and improve their operational efficiencies with EzeScan's automated intelligent document capture solution for NetDocuments.

Staying competitive and profitable in the legal space means being able to retrieve and action critical information in a timely manner. The integration means law firms can transform time-consuming manual business processes into highly automated digital workflows from the moment information enters the business.

Whether scanning incoming mailroom correspondence, back scanning existing client files, or registering documents, EzeScan focuses on reducing the repetitive administrative tasks associated with registering documents so legal professionals can focus on providing their clients with the best legal advice possible.

Kevin Blackley, International Business Development Manager for EzeScan, said, "We are pleased to be able to partner with NetDocuments to provide the legal profession with a solution that will help their digital work process and improve efficiencies.

"With intelligent capture capabilities, EzeScan delivers the fastest method available to capture and register both hard copy and digital born documents directly into NetDocuments," said Mr Blackley.

With EzeScan's intelligent capture capabilities, document batches are correctly named, distributed, filed and uploaded to the correct matter workspace in NetDocuments. EzeScan provides ad hoc scanning, image enhancement, data capture, validation, and upload automation, all designed to limit the amount of user intervention and help ingest the information faster.

EzeScan's web browser interface enables staff to QA, validate and register their documents from their computer or mobile device, anytime, anywhere. By simply capturing one piece of information (e.g. Matter ID), information using EzeScan's NetDocuments integration will upload the document with the client and matter number directly into correct workspace.

In addition, the integration also enables the user to securely capture and action matter related documents wherever and whenever needed using EzeScan's Remote Indexing WebApp. Organizations can now effortlessly capture documents from their MFP front panel or upload digital born documents when they are out of the office, directly to their matter files in NetDocuments.

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

Kissflow enables Ad Hoc Workflow

SaaS software company Kissflow Inc has rolled out a more powerful and comprehensive version of its flagship product, Kissflow Workflow. The new enhancements will allow business users to automate and track both structured processes as well as unstructured dynamic cases using a single no-code platform.

In today's dynamic work environment, business users are constantly swamped with ad hoc and unpredictable processes & tasks, and the number of these processes continues to grow with remote and hybrid work. While the majority of these workflows can be automated, a large number of business users, functional managers, and team leads remain heavily reliant on spreadsheets, as modern alternatives don't offer the flexibility for them to design their own workflows or are too complex to deploy.

The latest version offers capabilities to automate both simple processes as well as complex & dynamic cases in a single platform. Teams and business users can take full control of workflows, no matter how unpredictable use cases are, such as issue tracking, lead pipeline, help desk, and many more. Over 140+ readymade templates are available for business users to set up and launch anything from simple approval requests to complex processes. These drag and drop templates are built for use by HR, sales, IT, finance, procurement, customer support and other functions.

The platform also comes with contextual collaboration built into it. The process-based activity feeds make for a collaborative workplace. The advanced plan is priced at \$US9.99 per user and the fully loaded plan comes at \$US19 per user.

<https://kissflow.com/>

Deep Analytics for Cloud Data

Komprise has introduced a new way to search file and object data across clouds, Komprise Deep Analytics Actions. It promises a systematic way to find specific data across hybrid cloud storage silos and move just the right subset of data to rapidly feed data pipelines.

Komprise Deep Analytics Actions is the next phase of evolution for Komprise Intelligent Data Management, tackling some of the most pressing problems with unstructured data today: it's too large, encompassing billions of files and objects; too scattered across many storage silos with limited visibility across the silos; too hard to search for specific user needs such as analysing car test data for a particular scenario, and too slow to move into environments where it can be used for analysis and manipulation or for cold data storage.

Learn more about Komprise Deep Analytics Actions at www.komprise.com/whatsnew

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