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knowledge management

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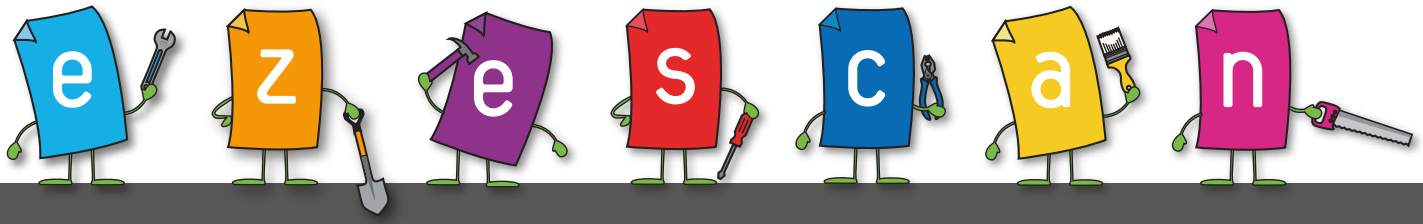

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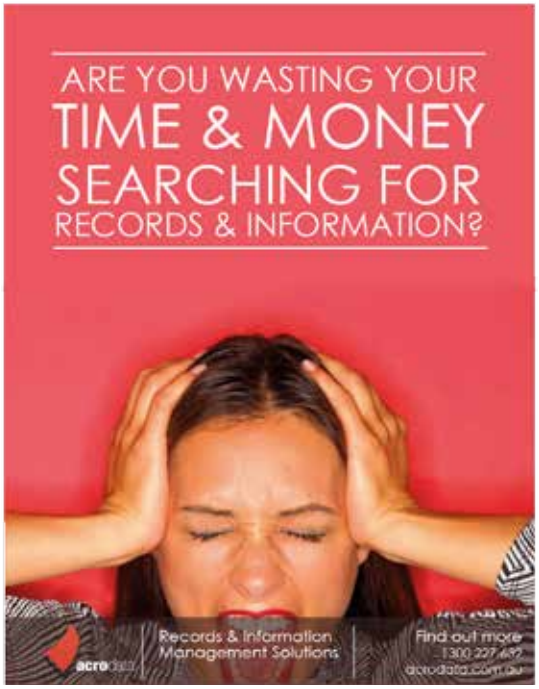


Vendor 'confusion' hinders uptake

A new study by information management analysts AIIM concludes that business leaders see collaboration as 'crucial,' but are confused by the rapid convergence of tools.

The study, '*Content Collaboration and Processing in a Cloud and Mobile World*', found that 93 percent of business leaders believing internal collaboration is either crucial or very important to what they do, and 59 percent holding the same to be true of external collaboration.

Eighty-nine percent of respondents said that a formal collaboration system was a vital piece of infrastructure, yet 54 percent found the rapid convergence of collaboration and social tools to be very confusing. External collaboration was particularly problematic, with 71 percent feeling their organization has shortfalls in technical support for external and four in ten feeling strongly that external collaboration is badly supported.

"Most organizations now have a large ecosystem of collaborators, including external partners and third parties as well as internal staff," said Doug Miles, Director Market Intelligence, AIIM.

"But managing the tools required for such collaboration can be a challenge. While IT support for collaboration beyond the firewall has made great advances, organizations appear to be lacking in the support required to really reap the benefits of collaboration."

The three biggest strategic drivers for improved collaboration were general productivity (47 percent), knowledge pooling (46 percent), and pulling together a dispersed workforce (36 percent). It was also seen as important to speeding up review processes, customer responses, and project completions.

The most important features to support collaboration, according to the research respondents, were sharing of documents (74 percent), workflows for comments and approvals (49 percent), and content access from mobile devices (37 percent).

Document and content sharing is highly likely to involve external collaborators beyond the firewall, yet traditional onsite systems are deliberately set up to be secured against access to those outside of the business. This means many users will turn to consumer cloud file-sharing services such as Dropbox, OneDrive, i-Cloud, Google Drive and YouSendIt.

Such consumer file-share and sync services are banned in more than half (56 percent) of organizations, with 27 percent actually restricting access. Only 23 percent currently provide an approved business grade alternative.

"The convenience and ease-of-use of consumer file-share and sync services make them very attractive for collaboration," said Doug Miles, Director Market Intelligence, AIIM.

"But such tools have security implications and organizations must look to provide flexible and easy-to-use collaboration functionality across the business if they really want to discourage use of consumer tools."

The research for '*Content Collaboration and Processing in a Cloud and Mobile World*' was underwritten in part by AvePoint, EMC, HP-Autonomy, Hyland, IntraLinks, Kofax, Seismic and Workshare. The full report can be downloaded from the AIIM website

ABBYY unveils FineReader 12 Corporate edition

ABBYY has announced the availability of FineReader 12 Corporate, the next generation of its Optical Character Recognition (OCR) solution.

Designed for automating document conversion in business, government and academic environments, FineReader 12 Corporate offers faster batch conversion of documents; enhanced accuracy, image pre-processing options and OCR recognition speed; and a new background OCR approach.

"FineReader Corporate gives organizations an efficient way to process their documents, helping to streamline their work," said Ivan Bodyagin, director of the FineReader Products Department at ABBYY.

"The new version provides greater speed and accuracy when searching, copying, and reusing information "sealed" within document images."

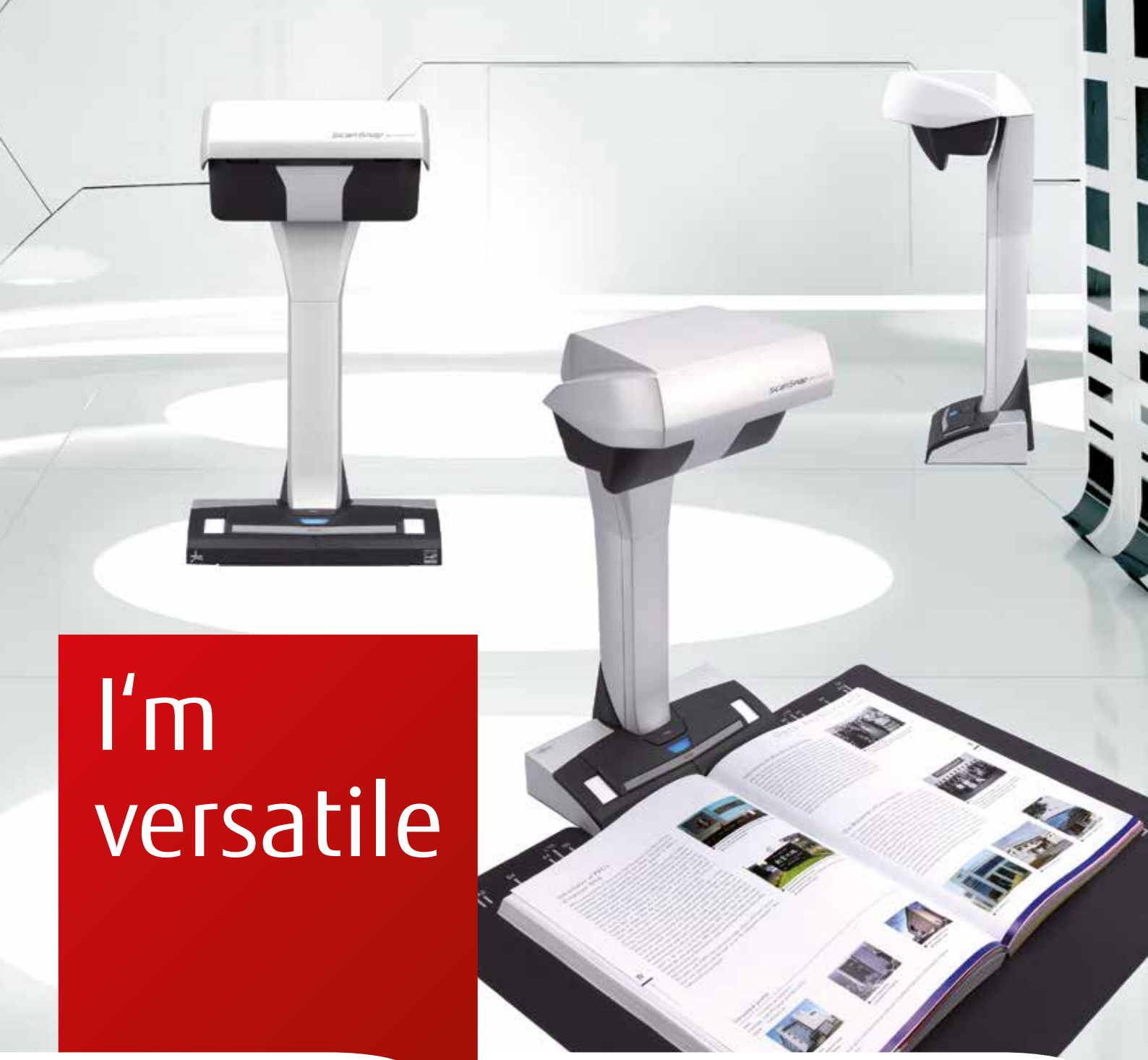
Designed for installation across workgroups and organizations, ABBYY FineReader 12 Corporate delivers intuitive tools for scanning documents (with support for network scanners and MFPs) and converting images of documents into editable and searchable electronic formats.

In addition to all functions of FineReader Professional, the Corporate version offers "Hot Folders" for automating and scheduling processing tasks and the ability to share tasks among workgroup users, Volume and network licenses with centralized installation, a dedicated license manager function, and flexible licensing options support deployment in a variety of enterprise environments.

Key enhancements include:

- Improved Accuracy on Business Documents and with Asian Languages — Includes a new tool for removing colour stamps and pen marks on document images, improves table conversion by up to 40 percent and offers up to 30 percent more accurate retention of charts and graphs. FineReader 12 Corporate also features up to 15 percent improvement for Arabic OCR, up to 10 percent for Hebrew OCR, and up to 20 percent accuracy increase on Chinese, Japanese, and Korean documents.
- Enhanced Hot Folder and Batch OCR — Improved Hot Folder function provides faster batch conversion of documents and dual-core processing support. In addition, it offers more flexible naming options, allowing users to add prefixes and suffixes to file or folder names in order to better organise them.
- Visual Quality Enhancement for Scans, Photos, and PDF Documents — Improved ABBYY Camera OCR enables users to turn photos of documents into scanner-quality images, and offers new photo pre-processing functions, such as auto crop of multiple images and whitening of the original document's background. The new PreciseScan technology improves the visual quality of documents for easier reading, archiving or better printing results.
- Improved User Experience with Background OCR — Enables customers to open, view, and start working with a document of any size immediately, even while it continues to be processed in the background, saving considerable time by providing access to all document pages at once.
- Easier Saving and Retrieving Files from the Cloud — Provides easier access to popular cloud storage services, such as Google Drive, Dropbox, and Microsoft OneDrive, among others, as well as direct integration with Microsoft SharePoint Online / Office 365.
- Faster and Easier Verification & Correction — The enhanced verification tool now allows users to apply both spelling and formatting corrections with intuitive hot keys and tab controls that make it easy to navigate through the verification process.

For detailed product information, or to download a free trial version of the application, visit: http://finereader.abbyy.com



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Objective Connect comes to HP TRIM

Objective Corporation has broadened the reach of its cloud file sharing platform, Objective Connect, to users of the HP TRIM EDRMS. Designed as a platform to allow government agencies to securely share internal documents with other agencies, private industry and the public, Objective Connect is tightly integrated with the Objective ECM 8 suite.

The new integration with HP TRIM will allow users to share information directly from their TRIM records management system beyond the firewall, while maintaining auditability and traceability.

The integration will provide a simple "Share" menu from within the TRIM interface that places a document on the Objective Connect cloud and keeps it synced with the local version, while keeping a record of who accessed the document externally and any changes.

Objective Connect is compatible with TRIM Version 7.

Tony Walls, CEO of Objective Corporation said, "Objective Connect for HP TRIM sees us continue to deliver our vision of enabling secure information sharing and process management between organisations, irrespective of their underlying content management systems.

"Objective Connect for HP TRIM provides government grade security and conforms to the Australian Government Information Security Manual (ISM) for sharing information up to and including Protected level and Impact Level 2 and 3 (IL2/IL3) in the United Kingdom. An organisation uses the security principles already in place to dictate what information can be shared with whom.

"Objective Connect acts as an extension to HP TRIM, enabling an organisation maintain the security and data sovereignty they require, while making it easy for individuals to share information. This drastically reduces the on-going creation and management of additional silos of information, while maintaining organisational compliance.

"Today thousands of Government users in Australia, New Zealand and the United Kingdom are using Objective Connect to transform their business processes," said Walls. "From procurement and legal processes, to collaborating with stakeholders or partners, Objective Connect enables the secure extension of business processes with other organisations."

Auditability and traceability of information being shared is critical to organisations. The Objective Connect Reporting Dashboard delivers real time consolidated visibility of all information being shared by all users. This ensures greater accountability and a complete view of the information being shared.

To learn more about Objective Connect for HP TRIM visit objectiveconnect.com.

Sunshine state switches to Office365

Office365 is being deployed to almost 150,000 government employees in Queensland, in a deal that that is expected to shave $A13.7 million off Microsoft licensing costs over three years.

The state's public servants will use Office 365 for messaging and email, and are also expected to migrate to the Microsoft enterprise social network Yammer.

"It's a good news story out of the Queensland Government's ICT Renewal Agenda and ICT Strategy 2013-17 that benefits government and Queenslanders," said the Hon. Ian Walker MP, Minister for Science, Information Technology, Innovation and the Arts.

"It is also a significant step forward in our plan to modernise the government ICT environment and move toward the vision of ICT as a service.

"It sees us move from a government owned and operated model to one that leverages world class solutions to deliver flexibility and economies of scale that drive innovation and transformation."

Privacy laws catch Australian firms on the hop

More than three out of five Australian organisations were unprepared for the Privacy Amendment Act (PAA), according to a study from storage and information management company Iron Mountain.

This lack of preparedness may leave organisations vulnerable to new fines and penalties when the changes took effect on March 12. Galaxy Research asked more than 100 information security managers at medium to large Australian organisations about their state of preparedness for the new privacy regime. It found the majority of organisations were unprepared for the changes to the Act, with 46 percent having not evaluated the law's impact to their business, and 17 percent completely unaware of it.

As of December 2013, more than three out of five organisations surveyed had not yet commenced any activity to prepare for the new legislation; Seventeen percent of organisations have experienced a material information mishap - either loss or disclosure, from accidental or malicious means - in the year prior to December 2013. More than 70 percent of organisations believe that the risks associated with management of information are greater than ever.

"Perhaps the most interesting finding is the evolution of the information risk officer role within Australian organisations," said Greg Lever, managing director, Iron Mountain Australia. "Just a few short years ago, information was barely part of the risk manager's portfolio. Now, it has become a standalone role in many companies, demonstrating just how crucial information management has become."

Organisations that have an information risk officer are, on average, twice as likely as others to do the following:

- Begin making changes to comply with the PAA
- Be familiar with the draft Mandatory Breach Notification legislation
- Ensure that information security is ingrained in every employee through training
- Have ISO 27000 accreditation

"Many of the findings of the study confirm what we have suspected to be the case for some time," Lever said. "While organisations are coming to recognise the importance of information as a source of competitive advantage, too many are either unaware or simply not ready for the challenges of today's information landscape."

Iron Mountain has also released a Quick Guide to the Australian Privacy Principles in partnership with global legal firm K&L Gates. The guide provides advice to assist businesses to better understand the new regulations and is available at http://ironm.com.au/downloads.

"The Information Commissioner has signalled his intention to actively enforce the new Privacy Regime from the 12th of March, so it would be wise for all affected businesses to take steps to ensure they understand and comply with the APPs," said Andrea Beatty, partner, K&L Gates.

In parallel with the proliferation of information, regulators have become more involved in the way organisations store and handle this information, and as a result, the risks to Australian organisations associated with the management of information are now greater than ever.

Sony/Worldox launch "Digital Paper"

Sony has begun an initial launch of a new "Digital Paper" initiative in the U.S. to legal, higher education, and government and enterprise markets. In collaboration with Worldox, a leading legal and financial document management company, Sony's Digital Paper is promoted as a new way to read, annotate, and share documents electronically.

"This is a true replacement for the vast amounts of paper that continue to clutter many offices and institutions," said Bob Nell, director, Digital Paper Solutions of Sony Electronics.

"It is very easy to use and optimised for reading and annotating contracts, white papers, scholarly articles and legislation. The 'notepad' feature will have universal appeal, and notes can be shared with clients, colleagues, and co-workers. "

Sony's Digital Paper has a 13.3 inch display that shows full-screen views of letter-sized documents in the PDF format, eliminating the need to zoom or scroll when reading a page.

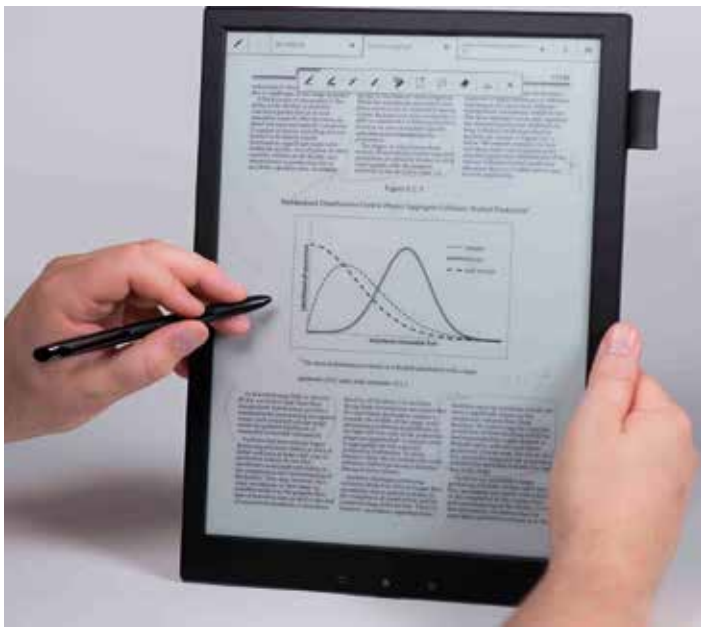
The Digital Paper device retains the context of an entire page by displaying sharp, easy-to-read text and graphics that are nearly identical to printed documents or full-size notepads.

The device's touch panel enables users to operate the menu or turn pages by simply touching the screen. Using the included stylus, professionals can write fluidly and directly on the panel, and also easily highlight and erase text, for a familiar and comfortable writing experience.

Digital Paper is being promoted as a way to help organizations reduce or eliminate the time-consuming and costly process of printing, copying, sharing, transporting and discarding corporate documentation, teaching materials, and reports.

With Digital Paper, documentation for meetings, classes or lectures created on a computer can be uploaded to a server, and then distributed over a wireless network to the Digital Paper devices of colleagues or students in multiple locations,

Sony showcased Digital Paper at the American Bar Association Tech Show in Chicago along with Worldox, which serves more than 5,500 law firms, financial institutions, and other enterprises.



Worldox is integrating Digital Paper with its Document Management Solution (DMS), so legal and other professionals can easily and securely access documents, upload handwritten notes and annotated documents, and share with other individuals or groups. Sony says it is also developing additional markets for Digital Paper in collaboration with leading companies serving several key markets, which will be announced in the coming months.

In addition to PDF source files, Microsoft Word, PowerPoint and Excel files can be converted to the PDF format and saved, viewed and annotated on the Digital Paper device. For speedy retrieval and transfer, Sony's Digital Paper incorporates wireless access to servers (via Wi-Fi) as well as USB connectivity. Digital Paper is planned to be available in May, initially through a select group of Worldox agents, with a suggested list price of $US1100.

For more information visit www.sony.com/digitalpaper.

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Knowledge Management & the Technology Nexus

It's a bit like the classic chicken or the egg question, which came first, knowledge management or the technology to enable it?

In 1999, Bill Gates famously defined knowledge management as "not even start[ing] with technology. It starts with business objectives and processes and with recognition of the need to share information."

It may not start with technology, but in 2014 the pursuit of knowledge management across the corporate and government sector is driving healthy sales of software and solutions for collaboration and content management across all areas of enterprise and government.

According to KM consultant Gina Jennings "Knowledge management is like running a kitchen. It doesn't matter how much you spend on technology, if you can't cook and don't get the recipe right, the meal will be a mess."

City of Onkaparinga

The drive to improve Knowledge Management (KM) capabilities is one of the central motivations of a five year roadmap to entirely transform the ICT platforms at City of Onkaparinga, the largest local government authority in South Australia.

Tony Bezuidenhout, Manager Knowledge Management at the City of Onkaparinga, said this was alongside a drive to innovate, improve process, increase productivity and efficiency gains.

"Knowledge management is not just the information that more often than not lives in drawers, filing cabinets, desks, email, document management systems and other repositories, its also the knowhow and information staff hold in their "head".

"Additionally there are all the external information sources, such as Australian standards and legislation to mention a few that also need to reside in the single source of truth repository so that when a question is asked a single corporate answer is returned and not 200 versions as you if you ran an Internet search, all of these components make up KM.

""Application rationalisation and the use of a single Data Warehouse will help address knowledge management, as with 248 separate applications and related databases it presents a tremendous challenge to report on data from all these systems."" - Tony Bezuidenhout, Manager Knowledge Management at the City of Onkaparinga, SA.

"In general organisations globally don't do KM very well so we need to capture, develop, share, and effectively use organisational knowledge."

Tony gives the example of a number 07042014 being simple data, however formatting that data as 07/04/2014 means it becomes information.

"When you attach that information to an event it becomes knowledge, while wisdom is the injection of experience and judgment informs decision making," Tony says.

"You need to also develop the ability to have a form of artificial intelligence that is able to minimise the loss of corporate knowledge when staff are promoted or move on to new adventures because you've implemented the right workflows and processes. Once you have these elements in place you've built solid knowledge management foundations for the journey ahead in my view."

The local government authority serves 165,000 residents and supports 640 IT users among a staff of 730 working at 23 offices connected by a private cloud. However as field data collection and mobility grows the IT user base will increase to include current non IT users.

Since arriving at the council 18 months ago Bezuidenhout conducted an IT audit which revealed there were 248 software applications in use across the organisation and there were many opportunities to improve information management including ICT Infrastructure design.

The nirvana for the City of Onkaparinga is to take an environment comprised of those 248 applications an end up with a single ICT software and hardware platform in the cloud, that is highly available, fully integrated, scalable and user friendly.

This would be ideally provided by a single hardware and single software vendor.

The council has implemented SharePoint for its intranet needs and has begun deploying Teamsites for different business units. Directors are now blogging in SharePoint with staff able to access the intranet remotely from mobile devices in the field.

Federal Government Agency

Enterprise social networking tools have a large role to play in enabling KM, according to a Knowledge Manager at one large Australian federal government agency

"Finding the right person with the right knowledge is still the easiest way to obtain knowledge," she said.

"There will always be a lag in what is written and what is known and stored in people's heads. A really rich enterprise social networking tool can aid in finding people according to their expertise, the work role, their interests and their responsibilities. Sadly I've yet to see one actually in practice.

"Wikis and blogs are great for getting people to document and share their knowledge. Interestingly some of the more successful appear to be those that have gown organically and without formal sanction. As soon as something becomes the 'official' wiki or blog people seem to develop a resistance to contributing. This of course becomes an issue for an organisation which may have an official intranet as well as ad hoc pockets of knowledge which may not be accessible to the entire organisation.

"Enterprise search helps you find information, which may or may not constitute useful knowledge. Unless it is configured well and people know how to use it, search results may return too many responses to actually be useful.

"Taxonomy remains important in managing knowledge. A combination of a high-level taxonomy plus a semi-controlled vocabulary is one of the ways of making sense of large amounts of data. While social tagging has a place it works best in an environment with some structure. Overly detailed taxonomies however are frustrating for users and have their own problems," she said.

Waitemata District Health Board

Tendayi Nyangoni is Manager Knowledge & Health Records at the Waitemata District Health Board, a provider of hospital and healthcare services to more than half a million people in Auckland, employing around 6,800 people in more than 30 different locations.

"Document Management is key to knowledge management. Some key organisational knowledge assets are in the form of explicit knowledge and are document based. As a result the role of document management in facilitating the creation, capturing, storage, transfer, use and reuse of knowledge is critical," said Nyangoni.

The Board is in the process of introducing SharePoint 2013 to provide the capability to do Wikis, blogs, enterprise social. It will also be implementing enterprise search to integrate SharePoint with a number of systems and repositories.

"We plan to introduce an expertise location system with dynamic people profiles," said Nyangoni.

"We are currently using an intranet which is developed using DotNetNuke but we are considering moving to SharePoint 2013.

Currently there is limited use of the collaboration tools in SharePoint 2007 for document based collaboration. Moodle has also been introduced for on-line learning. "Data overload is sometimes regarded as a constraint, an environmental issue and "noise". For knowledge management this "noise" requires more listening attention from organisational users.

"It definitely makes knowledge management more important as it requires knowledge management to come up with tools to cope with such noise and help focus practitioners or organisational users to the right information and knowledge assets. "Whilst everyday data overload may be seen as a drag by ordinary social users and others, from an organisational perspective it has opened up a lot of opportunities for deriving significant meaning and value from this information. The advancement of knowledge and information management tools are making it possible to derive value out of data or unstructured information which in the past has been of limited value.

"Collaboration is a key knowledge management enabling capability" - Tendayi Nyangoni, Manager Knowledge & Health Records, Waitemata District Health Board.

"Knowledge Management systems are helping shape or capture premium content. For most astute and forward thinking organisations this data overload provides an unlimited source of value. The more discerning and technologically enabled organisations are able to, with the right tools, sift through this information and come up with valuable insights that aid decision making, enable innovative ways of working and better support organisational goals and strategies.

"Data overload does not necessary emanate from external disparate sources but also from internal sources. Knowledge Management is more important for utilising the ever increasing data and making sense of it (through data associations or data matching from disparate sources and deriving more meaning to aid decision making, policy formulation, process enhancements and innovation (knowledge asset optimisation). Such opportunities have increased organisational capabilities in dealing with complexity by providing the means for understanding the complicated and complex organisational issues," said Nyangoni.

North Queensland Bulk Ports

North Queensland Bulk Ports Corporation (NQBP) is a leading port authority responsible for world-class facilities at the working ports of Hay Point, Mackay, Abbot Point and Weipa. It has 180 full time employees at its Brisbane and Mackay corporate offices.

Bryan Williams joined NQBP two years ago as the corporation's first ever Knowledge Manager.

He quickly identified a number of disparate core knowledge assets or siloes across the organisation, including TRIM, Outlook 2010, SharePoint 2013 and network drives.

"My vision when I came on board from a Tier One firm in a global role and consulting background was to scrap it all and thrust a new collaboration portal (SharePoint 2013) upon end users, but that change methodology was too much too soon and too aggressive for the majority. So instead I decided to go down the path of system unification, so it doesn't matter what system each end user likes to use, they will be mapped and bridged to one another. For example, a knowledge piece in a network drive will be mirrored in TRIM and SharePoint as well.

"This method is best fit as it doesn't matter which system end users like to work from it all looks the same. Going forward we will use metrics and tracking to gather analytics on which systems are more widely used and eventually reach a best informed decision to have a cut-off date to migrate all end users over to a single platform.

"As we upgrade to RM8 from TRIM, it has the potential to become an information governance tool, because it will become our single source of truth for all documentation and records across the Corporation. However this has yet to be determined as RM8 still functions as an eDRMS. We're looking forward to a smoother integration with our other knowledge assets as a result of RM8. This new upgrade promises to deliver the best of

(Continued over)

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both worlds for all end users during the transition phase of moving them to collaborative portal."

Part of this major transformation phase involves moving from manual paper-based processes to electronic and digital based assets. Nintex workflows are being deployed to provide automation and sustainable improvement across business processes and moves the Corporation from paper based manual form processes to a true online, streamlined and dynamic one.

"By improving our business processes will make it easier and more effective for the entire workforce to come together as a collective and be more productive than ever before. Moving down this path carries very little end user education and training considering the banking and financial sectors having using online forms for quite some time now.

"When people ask me what I am do as a knowledge manager I tell them my first stage is to unify knowledge assets to provide a better user experience with a single user interface which underpins more efficient access, scalability and flexibility to address an increase in market pressure and enable the Corporation to out-perform competitors.

"When information is combined with personal experience it provides the perfect KM proviso. It creates something they have never had before and prevents re-inventing the wheel whilst providing the framework for collective wisdom to increase performance and business improvement.

"We use SharePoint My Sites as a staff profile tool so staff can continuously showcase their expertise and contribute to other areas of the Corporation where their expertise can add value. Even though we are only 180 staff, it's one of the most effective tools that we have deployed and the majority of the traffic across our intranet is for this purpose.

"To address the tacit knowledge capture from the global phenomenon from an aging population bubble, I conduct comprehensive interviews with subject matter experts, outgoing and long serving staff. I leverage these results by producing cognitive maps and decision making trees that capture how they think and how they go about making decisions which is then transferred and shared across the Corporation where relevant and to successors.

"I use the SBI model (Situation, Behaviour, Impact), which has been leveraged from the Learning & Development industry, to create a fresh approach to narratives rather than the who, what, why methodologies traditionally used. I use a marriage of taxonomy and folksonomy, to ensure political correctness of user defined terminology to enable a more precise search. SharePoint's FAST search will be the primary search engine that will trawl across all our Corporate Information."

The next stage in the KM journey for NQBP will see the introduction of enterprise social networking and possibly a move to Office365.

Sparke Helmore

Sparke Helmore Lawyers is a firm of 600 people working from eight offices across Australia. Peter Campbell, CIO/Director of Knowledge at Sparke Helmore, agrees the everyday overload of data is making knowledge management increasingly more important.

"It is coming in at a faster rate than we can digest it. In the context of a law firm there is new legislation, decisions and market factors that affect the way we work, and our clients (and competitors are changing too)," he said.

"We class KM as simply doing things more efficiently to reduce cost and drive better outcomes for our clients. If you apply that to an overload of data and look at technologies available then good search engines, aggregators and filters will help people reduce the volume of information they need to review. These systems don't manage themselves though. They require discipline, time and energy to implement and govern

"Document management is a no-brainer to help with KM. It provides a solid repository to store documents, associate relevant metadata (manually or automatically – or both). It then offers search tools, taxonomies for classification and also access logs/usage stats to help us manage whether a piece of information is useful. Some DM systems also incorporate things like full text search, concept search and various tools to mine the content and quickly find useful information.

"As far as collaboration goes, a shared repository is an essential element, a common taxonomy is the next step and incorporating social media is another useful idea. The ability to 'like' and 'rate' and comment on content, will help with searches to zero in on useful material and connect with experts or useful contacts. It isn't the perfect way of finding information but can help point people in the right direction. Unfortunately at the moment the culture of a law firm doesn't immediately send itself to people rating content. The legal sector is a bit conservative on this front.

Sparke Helmore has had some success with wikis although these introduce the challenge of being able to control the structure of the information.

"A Wiki is no use if everyone is feeding it information into different locations with not enough shared knowledge of the taxonomy and classification. We have found them to be good for specific user communities and with short projects when the content is dynamic, evolving and perhaps with a reasonably short shelf life. I'm not saying they aren't or can't be useful, just that you can't just set one up and walk away

Sparke Helmore has not found any reason to deploy SharePoint.

"One of our most important KM systems is document management. SharePoint does that but not as well as Autonomy/iManage. I have heard many stories from peers and the industry as to how much SharePoint needs to be customised. I have also heard governance and site sprawl horror stories because people didn't set up, maintain and curate their content on the systems."

Law firms have a collection of different technologies. Taxonomies and content management are essential for managing information flows across our repositories, so we can deliver an integrated experience based on categories, which suit our users, our content and our context." - Peter Campbell, CIO/Director of Knowledge at Sparke Helmore.

While enterprise search offers a lot of very desirable functionality for KM, Campbell is wary of the potentially costly and complex implementation and ongoing challenge to classify information.

"It isn't for us at the moment because we have managed to take the most important step of having all of our documents stored in a central DM repository – with a decent scalable full text search and basic data miner.

"We are keen to ensure people can quickly find the things they need, but to ensure enterprise search is a rewarding experience, at Sparkes we are initially focussing on aligning how we describe and govern our information, across our repositories.

"At the end of the day a lot of the above tools can help, but they cannot replace solid, methodical KM practises, backed up with a clear organisational commitment, reward mechanisms etc. Technology is an enabler, not a replacement for KM."

Maddocks

Established in 1885, Maddocks is an Australian law firm with more than 500 staff across Canberra, Melbourne and Sydney locations. In common with many law firms it employs Autonomy Worksite/Filesite for document automation and management along with Hotdocs, Workshare an Atlassian Confluence/JIRA intranet. Other collaboration systems used include Interaction, Caseflow, ePortfolio, Ringtail, LEX and DA.

Knowledge Consultant Suellen Thompson believes the main aim of knowledge management in a law firm is to develop a central accessible library of standard documents in conformity with the firm style and plain language, which are up to date and enable lawyers to produce high quality work quickly and efficiently.

"This provides a valuable resource for lawyers and a valuable service to clients. In the end, a law firm sells knowledge (or advice). Having this knowledge in a consistent, scalable and searchable form heightens the end-user experience.

> "IM and IT support for KM can be done and it can be an enabler. But the technology must exist within a KM framework to be successful - otherwise it deteriorates to "shelfware" - Ian Fry, Knoco

"Most lawyers recognise the value of a knowledge system but it is a question of whether they have the time to devote to building and maintaining it. It is essential to have a plan or strategy and assign some key responsibilities and deliverables. '

"Recognition' and support for knowledge sharing goes a long way in encouraging lawyers to share their well-learned expertise. At Maddocks we encourage our people to recognise and support the concept of knowledge sharing. Automated processes, firm style, policy, procedures and training will help to embed knowledge management practice into day-to-day operations. You've got to have people leading by example.

Ramona Saligari, National Learning & Organisational Development Manager at Maddocks , said, "Senior lawyers and partners need to role model, encourage and support the use of knowledge management across the firm."

As director of Australian knowledge management consulting firm Knoco Australia, Ian Fry has spent the past 10 years integrating IT and KM into projects for both private and public sector clients. He believes the everyday overload of data is making knowledge management increasingly more important.

"Data overload is an IM issue and should and can be addressed by IM tools. It is the "wheat in the chaff" that could be useful to Knowledge Management but probably not until we have semantic processing embedded in the organisation, and even with that it will take some real work. IM and IT support for KM can be done and it can be an enabler. But the technology must exist within a KM framework to be successful - otherwise it deteriorates to "shelfware"

"In the end, a law firm sells knowledge (or advice). Having this knowledge in a consistent, scalable and searchable form heightens the end-user experience." - Suellen Thompson, Knowledge Consultant, Maddocks

Fry has a particular problem with out-of-the-box (OOB) SharePoint implementations.

"It takes work to make it successful in an organisation. The parallel I use is buying Excel and expecting that Microsoft will have already written all your spread sheets.

"Often a Knowledge artefact (like a Wiki) is like a Wikipedia article - a good introduction. It needs to be supplemented by Expertise finders where face-to-face or other direct conversations with SME can take place."

His definition of KM is simply "The movement of practical knowledge between people leading to action"

Peter Campbell says "KM is about making the best use of what we collectively know. KM ensures we have roles and systems in place, to create, capture, share and maintain what we need, to support our work and link it to the staff who need to know it. This takes persistent effort."

NQBP's Bryan Williams believes KM provides confidence to end users in the use and adoption of information communication technology assets.

"KM transforms business by coming up with a new ways of working smarter not necessarily harder with the aid of new technologies and innovations to propel business and performance improvement. This in affect terms business and KM into something circular rather than triangular.

"A circular entity is healthier than a traditional triangular hierarchical entity. As the cliché goes - many hands make light work - and that's why a circular approach is the new way of doing business, it also symbolises a unified entity that has the strength and flexibility to adapt quickly to external influences beyond the Corporation's control," said Williams.

The Knowledge End Game

By Cory Banks

Far too often I have seen knowledge and information management projects fall short of achieving their full potential.

Now it's not because of the capability of the people delivering the project, the budget that has been allocated or the timeframes that have been set. It's because the outcome they set out to achieve is usually framed around deploying a platform, delivering training or offering a service. This usually ends up being delivered, but they have not followed through to ensure that what they deliver gets used and actually ends up creating value.

An example was the action of an Australia Pacific business of a global organisation. Senior executives had set a strategic goal to "Improve Collaboration". A "Collaboration Charter" was developed and emailed out to all staff. Job done. Do you think this actually made a difference?

Collaboration is a means to an end, not the end in itself. There must be a purpose or goal you are hoping to achieve through collaboration. The end game needs to be to achieve an outcome through improved collaboration.

What most people seem to forget is that we don't actually realise the real value of our knowledge and information until it actually gets used. Not created, stored or even shared. When it gets used.

This is where so many knowledge and information management projects, services and platforms continue to come up short. Far too often the project is broken down into manageable chunks and delivered to a scope, budget, schedule and quality aimed at facilitating creation, storing or sharing.

Another example is during the introduction of a new collaboration and content sharing platform to an organisation, the change manager is given the objective to ensure people know how to use the functionality of the platform to create, modify, store and share information and knowledge. The training material is top notch and clearly teaches people how to load documents, how to create and manage tasks in a shared task list and how to share a calendar. They provide a test environment and dummy content to practice on.

The training is rolled out successfully, but only a small amount of people use the platform and even then only for their own personal purposes, not to collaborate with others. Why?

What was missing was the context. They were shown how to use functionality but not what to use it for. Providing context for what to use things for is very important if you want to achieve the end game – getting people to use knowledge and information to make better decisions

So here are three pieces of advice for your next knowledge or information management project.

1. Discover the End Game – Use root cause analysis techniques to actually identify the end game (Example: 5 Whys). Know what you want the people to do with the knowledge and information that they will have access to.

2. Provide Context – There is a great term in sports coaching called 'specificity'. This relates to athletes undertaking training that closely matches the action or skill required when competing. Training in new practices and tools needs to be as close as possible to how people need to perform in real life. This could be done through training in their production environment, using their own content in terms of their day-to-day business activities.

3. Going the distance – Get beyond thinking about creation, capture and storage of knowledge and information. Goo further to focus on transfer and use. This is where value will be created and the potential will be realised.

Cory Banks is Practoce Lead, Collaboration and Prductivity for Glentworth. Hi will be charing the KM Australia 2014 Congress.

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Ensure information governance and compliant collaboration
HP Records Manager for SharePoint

Transparent, compliant management of SharePoint content

The popularity of Microsoft SharePoint in the enterprise poses a growing information governance challenge. On one side, your users adopt SharePoint for its flexible, simple-to- use functionality that supports information collaboration. On the other, those responsible for managing information governance—compliance and records—often view it as a tool that can lead to information in the wild: duplicate, outdated, and often unknown information that can't be easily searched, classified, managed, secured, or controlled.

Uncontrolled SharePoint environments too often lead to conflicts between users wanting to maintain their freedom and unvetted access to their favourite collaboration tool. Your information governance professionals then struggle to gain control over this information to ensure the secure and compliant management of business documents and records generated as part of the collaborative process. What's needed is a new approach that delivers full SharePoint functionality and flexibility for your users while facilitating effective but discreet compliance and information governance controls at all levels. Only, then can you meet the needs of information governance and collaboration.

Balancing compliance needs with collaboration wants

When it comes to information management in an organization, there are two key business roles that need to be considered: those responsible for IT infrastructure and those responsible for records management and compliance. Both of these roles have a similar mission which can be broadly described as: to capture and structure information in the organization. Despite the similarity of these objectives, the manner used to achieve these objectives differs vastly. Add to this your end users' desire for a flexible collaborative system, and you can appreciate the challenge of bridging the gap between compliance needs and collaboration wants.

While SharePoint is a strong and well-liked collaboration system popular with both users and IT, its governance shortfalls are not trivial. For example, SharePoint stores new, active content and old, seldom-accessed content in the same way, leading to unnecessarily high storage costs. SharePoint also offers only limited categorization and records declaration capabilities, and allows duplicate records to be created. Given these characteristics, it's no wonder industry analysts report that over 60% of organizations have yet to bring their SharePoint deployments in line with existing corporate and regulatory compliance policies.[1] Recognizing the value of SharePoint as a collaboration tool, but also understanding the governance shortfalls for the enterprise, HP Autonomy has developed an integration with HP Records Manager (HPRM) that allows you to maximize the value of your SharePoint investment while supporting effective compliance and governance. The HPRM integration allows users to leverage complete SharePoint functionality without compromise and does not need them to engage in, or undertake, records management tasks. Removing the records management burden from users reduces barriers to adoption and associated training overheads.

At the same time HPRM provides powerful records management capabilities for information governance professionals so they can govern and manage the entire SharePoint solution - not just for records compliance, but for cost governance as well.

Why organizations still need a records management solution

SharePoint offers a range of user benefits, but stops short when it comes to compliance and information governance. The content in the above mentioned workspace (or any workspace for that matter) may be subject to varying legal requirements and differing policy that SharePoint is unable to distil and apply. SharePoint's records management capabilities are rudimentary with categorization limited to either content type or site/list location—you cannot use both. This makes it difficult to choose the best approach to managing your content and can result in documents of a given type being subject to the same information management policy no matter the business requirement. The ability to manage application and compliance lifecycles in an integrated manner to ensure the appropriate management of SharePoint content throughout its entire lifecycle is limited and exposes the organization to compliance gaps and risk.

Organizational approaches: SharePoint uses hierarchical site and list structures, while HP Records Manager uses a hierarchical folder structure that may be built on the business classification. These weaknesses may not matter much to users since they don't interfere with daily work. In fact, SharePoint users may be seen as indifferent to governance. Their reasons for disliking records management tends to arise out of the prescriptive approach to structuring information hierarchies: it forces them to organize information in a way that doesn't match how they as an individual use the information. It's unfamiliar to them and requires greater levels of user training.

Records managers, compliance officers, risk managers, and others tasked with addressing cost, compliance, and risk requirements naturally have a more positive outlook on records management practice and tools—they aren't nearly as enthusiastic about SharePoint as users are for a range of very valid reasons, including:

Difficulty locating information: There is no easy way to find all the information classified in a particular way, adding unnecessary time and work to many information governance tasks. HPRM enables records managers and users to navigate the business classification and uncover the information that belongs to each category.

Duplication of information: Nothing prevents the creation of duplicate information. And SharePoint's mechanism for copying actually makes a new copy of the file, not just a link to the original, making additional duplication inevitable. Since SharePoint does not support de- duplication within a document library, the ongoing accumulation of duplicate records strains the storage system. This ever growing information footprint and associated storage starts to impact the IT Managers budget and resources. HPRM enables information to be surfaced in multiple places in SharePoint while maintaining a single authoritative record.

No granular control around retention: It is difficult to apply retention policies based on the type, classification, or location of information, rendering these more efficient approaches unavailable and exposing the organization to risk. HPRM can apply retention policy to information based on its type, location, and classification either automatically or ad-hoc.

Inefficient storage of lower-value information: Studies have shown that, on average, 60% of data stored in SharePoint is never accessed again after three months from its creation date. Yet SharePoint makes no distinction between the older, rarely accessed items and newer content for more efficient and cost effective storage. HPRM supports tiered storage and configurable caching options to balance the need for search and retrieval speed with storage costs. Old and inactive information can be moved to appropriate storage to meet the needs of the organization.

Lack of control over information: People can easily create sites, lists, and content that information governance personnel have no way of controlling or bringing into compliance. Security and access to this information is governed by the individual and not corporate or regulatory policy.

HPRM delivers much needed control over SharePoint information applying policy, security, and audit to managed content, including policy enforcement at the time of site creation. These SharePoint security and risk considerations can bloat its already considerable cost of ownership. Taking into account

1 AIIM, Using SharePoint for ECM, 2011.

hardware, software, deployment, ongoing administration, governance, and management labor costs, SharePoint management adds up to an average cost of $49 per user, per month. This cost does not decrease, even as the usage of SharePoint expands within the organization, despite expected improvements in economies of scale that normally come from increased technology.

Why HP Records Manager?

As SharePoint is popular with users, HP Records Manager is popular with records management and information governance professionals. HPRM is recognized as a leading enterprise document and records management solution, established and proven in the market for more than 28 years. The benefits HPRM brings to an organization's SharePoint deployment are easy to quantify. HPRM is designed to bring records management compliance to organizational information and provides the extensive governance functionality lacking in SharePoint, including:

- Proven industry solution with global certifications
- Policy-driven content classification
- Full legal hold functionality
- Defined retention schedules
- Multi-level security and access controls
- Department of Defense-certified security standards DoD5015.2
- Support for global standards such as ISO15489 Records Management Standard and ISO16175 Principles and Functional Requirements for Records in Electronic Office Environments
- Secure content aggregation
- The ability to structure records based on their location or content type
- Extensive and granular audit capabilities for all items

Achieving records management compliance for SharePoint

The desire for compliance and collaboration results in two opposing groups forming within the organization: on one side, pro-SharePoint IT personnel and users, who view it as an accommodating solution for key user wants and needs and on the other side, pro-HPRM compliance, IT, and records managers who would rather live in a world without SharePoint which they feel erodes control and compliance. Each of these groups plays an important role in the management of corporate information, but the essential conflict between the groups comes down to this:

- Users want to organize information in alignment with the way they create and consume it today.
- Records managers want to structure information in a way that best supports long-term access and compliance.

While each of the groups described above tends to see SharePoint and HPRM as mutually exclusive, this is actually false. In reality, these two products are complimentary. Coupling them allows the popular SharePoint collaboration platform to also be compliant. This is achieved by not interfering with the user's ability to use SharePoint or requiring them to participate in records management practices, while permitting full use of the compliance capabilities of HPRM. The key is to have integration between the two systems that doesn't interfere with the capabilities of either one, respects the requirements of both users and records managers, and doesn't compromise the needs of either side.

The integration of HPRM with SharePoint was designed to meet the following objectives:

- Allow management of all SharePoint content, not just documents
- Permit users to use all SharePoint functionality, regardless of whether content is managed or not
- Permit the use of all HPRM functionality for content originating from SharePoint under management
- Make management visible or invisible to the user dependent on the organization's requirements
- Include configurability to suit all organizations, rather than force a compliance strategy

HP Records Manager for SharePoint available from HP Autonomy delivers a complete solution leveraging the strengths of each individual system. It allows you to significantly improve information governance in the organization without hindering collaboration and user productivity.

How the SharePoint-HPRM integration works

HPRM enables information governance for SharePoint through the concept of "managing a list item." This consists of creating a record in HPRM to represent the list item in SharePoint, then maintaining synchronization between the list item in SharePoint and the corresponding record in HPRM. If a managed item is updated in SharePoint, the corresponding record is updated in HPRM. Conversely, if the record is modified through HPRM, the corresponding list item is updated. In this way, synchronization between the HPRM record and managed list item is maintained.

- The integration extends this core concept to enable key tasks such as:
- Finalize: Manage the content and prevent it from being edited
- Relocate: Move the content to HPRM
- Archive: Move the content to HPRM and finalize it

These key tasks can be applied both manually and automatically, and be instigated against individual items, folders, document sets, lists and sites.

This approach offers crucial advantages. The integration makes it possible to manage all SharePoint content, not just documents, including content such as wikis, blogs, and calendars, and even entire sites. All of the functionality of both SharePoint and HPRM can be used with SharePoint-managed content. With the option of rendering management invisible, users don't even need to be aware that their content is being managed.

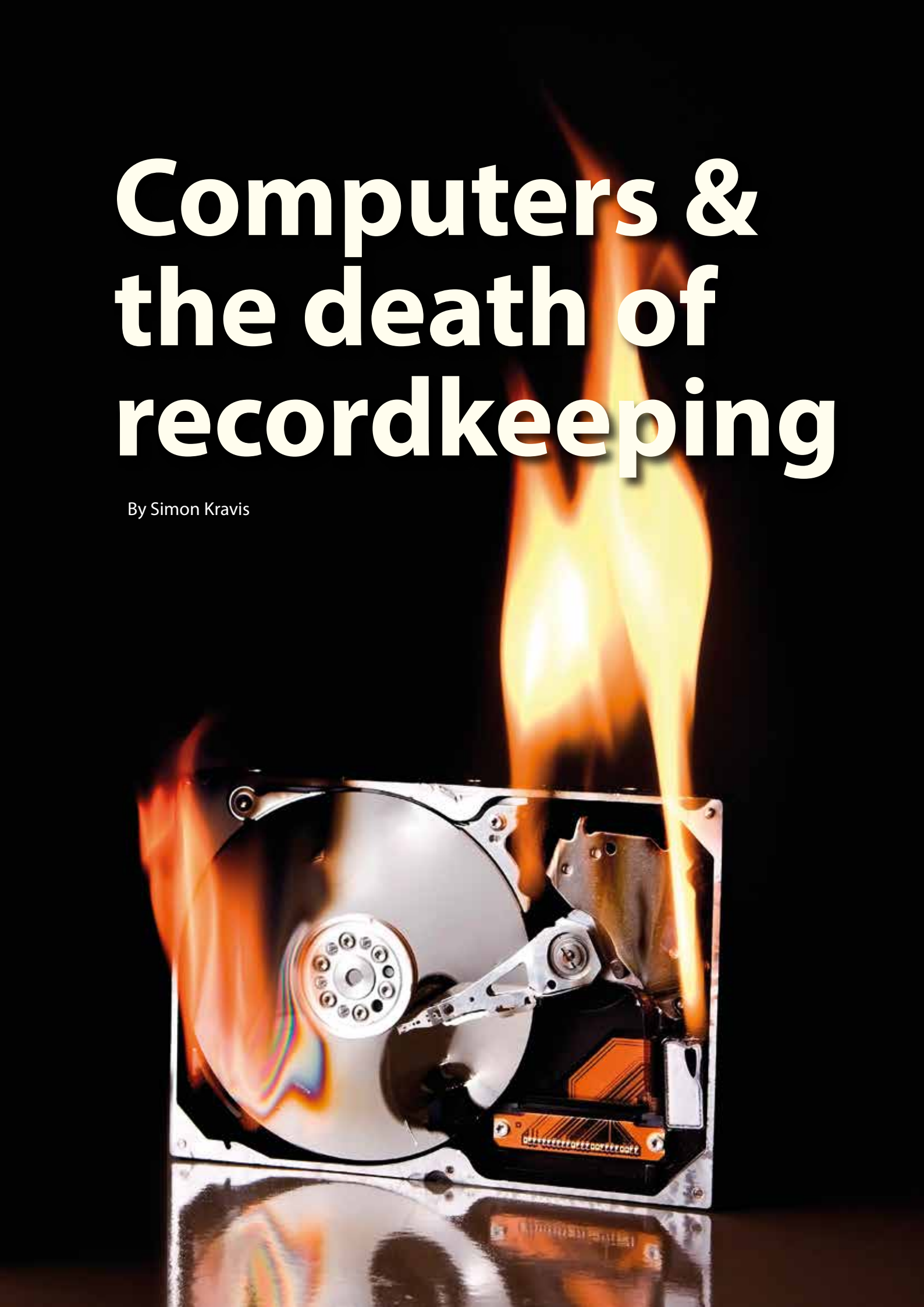
Governance doesn't have to mean choosing between the needs of users and those of records managers. The integration of HPRM with SharePoint allows you to maximize the utility and value of your SharePoint investment without compromising on the functionality available to users. At the same time, records managers can use HPRM to fully govern SharePoint content or just a subset. By integrating HPRM with SharePoint, you can fully leverage the complementary functionality of each solution to fully empower users, while giving records managers the tools they need to achieve full compliance.

This matrix shows the strengths and weaknesses of the information management capabilities of each system. Grey indicates that while the system can do this, the other product does it better.

Learn more at: www.autonomy.com/products/hp-records-manager

Computers & the death of recordkeeping

By Simon Kravis



Recordkeeping is the process of making and maintaining complete, accurate and reliable evidence of business transactions, and government records are crucial to individuals seeking to establish their identities or ensure their entitlements to basic human rights. With their enormous capacity to store information quickly and cheaply over a timescale of years, the computerisation of the workplace should have made the task of recordkeeping within organisations easier. In fact, standards of recordkeeping in many organisations have declined over the 25 or so years since computers became common in the workplace.

David Fricker, Director-General - National Archives of Australia, comments: "When computers came in, all the processes for records management went out". A report by the Australian National Audit Office (ANAO) on recordkeeping within a number of Australian Federal Government Agencies conducted in 2012 found that "The large majority of the agencies' records were created, captured and/or managed in the agencies' records management and other systems" but noted that "The [non-records management] systems ... did not generally meet legal requirements relating to the management, and destruction or transfer of records". Responding the report, National Archives of Australia observed that "...keeping records in multiple systems, particular where digital records are duplicated in paper format... presents a multiplicity of problems and increased risk, including loss of context, increased costs and reduced efficiencies because of difficulty in locating and retrieving records when needed, and inability to identify the authoritative record."

The key to the paradoxical effect of computerisation lowering recordkeeping standards lies in the decentralisation of information storage. In the pre-computer workplace, corporate information was stored in paper files which were kept in a central registry and administered by a hierarchy of clerks, who had responsibility for the creation and naming of new files, specifying file keywords (metadata) and deciding how long they files were to be retained for.

The head of the hierarchy defined the taxonomy of corporate information. Files were delivered to and collected from people manually, with a check-in/check-out system to track responsibility. People using files would add new documents (or folios) to the files, or annotate existing ones. The integrity of files in government organisations is frequently enshrined in law: removal or defacement of a folio in an Australian Commonwealth Government file is a criminal offence. Non-file documents certainly existed, but the primacy of files as the definitive information repository meant that non-file documents were regarded as ephemeral and were not generally retained.

The centralisation of typing resources in the typing pool meant that the demarcation between file and non-file documents was very clear: any document relating to a corporate decision had to be typed, document drafts were clearly distinguishable from final copies and all documents had to be placed on a file.

As computers have become almost universally used for writing documents and electronic mail widely used for circulating and refining them, the responsibility for deciding which documents are corporate records and storing them appropriately has been devolved to document authors. Significant cost savings accrued from this as the central repository and its hierarchy of clerks could be eliminated or drastically reduced in size.

However, document creators are not necessarily aware which documents constitute records, and may not have the training, tools or time to perform records management. The 2012 ANAO Audit noted: "Staff often stored information in a variety of places, but did not have consistent rules about the records that needed to be created and where they would be captured."

New forms of communication further tax the abilities of individuals to perform recordkeeping. The humble email, which has been used in many organisations for over 25 years, is frequently used to communicate organisational decisions and thus may constitute an organisational record, but its structure can be complex, with nested messages and attachments frequently present. The email subject rarely constitutes an adequate record title, but is often used as such.

Emails are difficult to transfer to other applications for long-term storage. SMS messages received on mobile devices may also constitute records but transferring these to any other storage device requires third-party software to be installed on the mobile device. Tweets and social media postings may also constitute records which require specialised skills to transfer to long-term storage.

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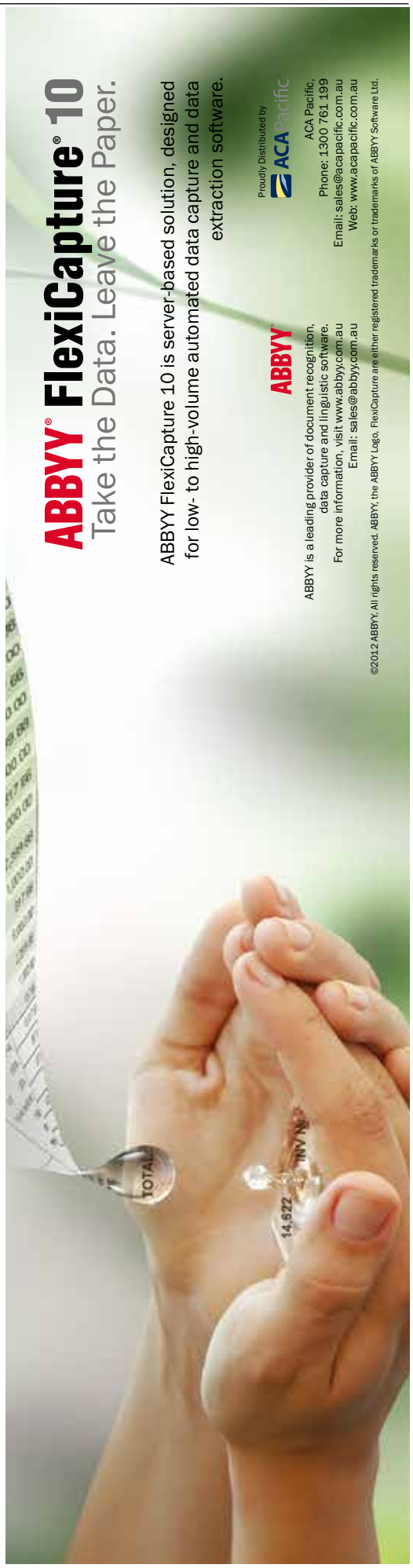


Computers & the death of recordkeeping

(From previous page)

The use of the modern computing devices provides access to enormously powerful applications for the creation, exchange and manipulation of electronic documents. Documents created by these applications are stored either in file system folder trees or in document libraries within electronic document and records management systems (EDRMSs).

Folder trees have been used for information management and storage for many decades as they provide a means of grouping together files and other folders similar to that provided by the paper files and folios. The major difference is that electronic folders may contain sub-folders to create a hierarchical tree structure which is frequently 20 or 30 levels deep. Access controls can be applied to give users personal and group storage areas and data can be easily backed up if the computer hosting the folder tree is always connected to a network.

The major limitation of file system folder trees for recordkeeping is the lack of version control. Documents can be changed without any record of who made the changes or when they were made and there is no distinction between modifying an existing document and creating a new one.

Local conventions for version control are frequently used, such as appending a sequence number, date or author to the file name, but these cannot be enforced over the large number of applications used in organisations. User identity is linked to ownership of an active account, so that when users leave an organisation, any files of folders which they own lose their ownership information. Users are also able to modify the folder structure in which they store their documents so the location in which documents may be stored is difficult to control. Search technology is helpful in dealing with these problems but is rarely deployed over shared storage due to expense and performance issues which arise in maintaining access control over search results.

Search results on document repositories are frequently much poorer than on the Internet as there is no hyperlink information to assist in ranking search results, leading to lack of use of search facilities even if they are available. A consequence of these limitations is that many different versions of the same document are found within file system folder trees.

Studies in widely different organisations have indicated that up to 40% of electronic documents created by desktop applications on file systems are different versions of the same document.

Simon Kravis grew up and studied Physics in England. He remembers records marked Electrically Recorded and the British semiconductor industry. A keen reader of science fiction in the 1960s, he has seen some of its elements become reality but can recall none that anticipated the impact of information technology on modern life. After coming to Australia, he worked in the academic and public sectors in laser physics and geophysics before computers and seismic data processing came to dominate his working life in the 1980s, after which he worked on scientific visualization, parallel processing and developed software for drilling engineers. He discovered the anarchy of information storage and management after joining Intology in 2004. Since then he has worked on tools to deal with it with minimal user disruption at KAZ and Fujitsu before starting his own company, Aleka Consulting in 2013.

By providing access to documents only through a database, EDRMSs can address these issues and have become much more widely deployed in recent years. They offer access to documents via a web browser rather than a file browser, making them much more suited to use from mobile devices. Microsoft Office applications such as Word and Excel can be configured to save and open documents from such systems by default and prompt users for any additional metadata. Interfaces are available for many EDRMs to use file browsers such as Windows Explorer so that users can continue to use a familiar interface for storage and browsing.

However, although EDRMSs can provide all of the functionality required for effective records management, organisations are reluctant to remove all access to shared file system storage as some applications require their data to be stored on a file system, and users are familiar with their operation. The performance of EDRMs tends to be poorer than shared file systems. Where both EDRMSs and shared file systems are both available for document storage, the EDRMS tends to become used for storing the organisational 'good china', containing clean, well-organised, but seldom used documents, with the shared file system being used for temporary storage before filing in the official recordkeeping system.

Governments have always recognised the significance of recordkeeping as a means of controlling their citizens, as well as delivering services to them.

The 2012 ANAO report noted extensive use of shared file systems in the reviewed agencies and observed that, "Significant delays in filing information to the official records management system expose records to alteration and deletion, ultimately impacting on the integrity and authenticity of the record."

Governments have always recognised the significance of recordkeeping as a means of controlling their citizens, as well as delivering services to them. The filing cabinets and Hollerith punched card machines of Nazi-occupied Europe were tools for the subjugation of local populations and for the implementation of the Holocaust.

In Cambodia, the Khmer Rouge destroyed all government records in 1975 as part of their "Year Zero" program, on the basis that everything now belonged to the State. The operation of any legal system requires recordkeeping to record events and transactions, and in societies which use writing, this involves the creation and storage of physical records. In Tsarist Russia, one of the harshest punishments an individual could receive was 'legal death'. All the records documenting the victim's existence in law were destroyed. Such 'non-persons' could not travel, work, marry or own property. With no protection or recourse under law, they were vulnerable to robbery, assault, slavery, even murder, because such acts against non-persons were not crimes.

In more benign conditions, the exercise of government responsibilities requires recordkeeping over very long periods of time, sometimes in perpetuity. For example, the health records of Australian military personnel have to be retained for 75 years after their creation. The design of electronic systems to function over this period of time is a huge challenge. Whilst there has been some progress in making documents self-describing using Extensible Markup Language (XML), so that they can be decoded by future electronic systems, the lifetime of modern storage devices is measured in years rather than decades. The current approach to long-term preservation of digital documents is

to keep them in an isolated digital repository and translate documents into newer formats as support for older ones disappears whilst keeping the original digital files for reference. Files are copied to new storage platforms as old ones become obsolete. This approach becomes more attractive as the cost of keeping paper-based archives increases and the cost of digital storage decreases , especially for documents originally created in digital form (born digital), but for very long term storage, the reliability of paper-based archiving is still attractive. With the high penetration of computers into the domestic environment, electronic storage of personal documents such as correspondence and financial data has become commonplace, and failures of domestic computers can cause considerable problems if data has not been adequately backed up. Whilst domestic recordkeeping does not present the same difficulties as organisational recordkeeping, the infrequent failures of modern home computers lead most domestic users to ignore the risk of data loss.

A 2014 survey by Kroll Ontrack, a provider of data recovery and ediscovery tools, found 36 percent of its Ontrack Data Recovery customers across North America, Europe and Asia Pacific experienced a personal data loss. Of these 35 percent did not have a backup solution at the time of loss.

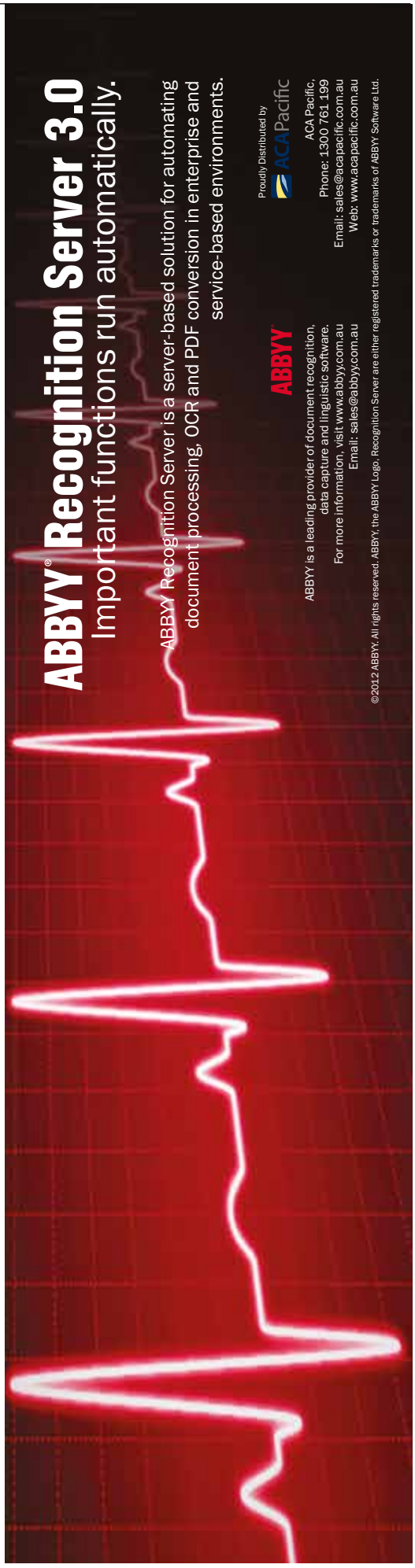
Cloud storage of data for domestic users relieves users of the need to back up data on home computers, but adds other vulnerabilities, such as reduced privacy, reliance on a network connection to access any data and the possibility of their cloud provider going out of business. The rapid evolution of storage devices means that it may be difficult to read data from older devices, which were once commonplace, such as floppy disks or Zip drives. Changes in file formats used by common applications and in the applications themselves also cause problems in reading older data.

The grandchildren of today's 70 year olds will have far more trouble looking at digital photographs of their grandparents in 70 years times than people now have in looking at paper photographs from the 1940s. The plethora of digital media files stored in most homes now is likely to be difficult or impossible to access in the future without application of the kind of systematic procedures used by archive organisations.

The advent of digital formats for books for delivery platforms such as the Amazon Kindle is likely to have similar consequences. If the experience with domestic backups is any guide, difficulty in accessing old data will be the norm rather than the exception in the future, as suppliers of the applications to read the data files will only maintain backwards compatibility as long as it is commercially viable. The use of public formats such as Adobe Portable Document Format (PDF) for text documents does not solve the problem, as extensions and variations are included in the many applications which read and write this format, resulting in difficulties in accessing many PDF documents. As a page description language, it is poorly suited to many information retrieval tasks.

The issue of management of electronic documents in by governments has been highlighted by the ongoing saga arising from the publication of 250,000 confidential US diplomatic cables by Wikileaks, an event widely known as Cablegate. In the pre-electronic era, the 250,000 cables would have existed only as a pallet-load of paper files, presenting a massive obstacle to their copying and distribution around the world. In addition, access to these documents would have been available to far fewer people than those who could access the leaked cables. The US Military classified intranet SIPRNet, on which the leaked cables were stored, has an estimated 4.2 million users, according to Wikipedia. Not all of these users would have had access to the cables, but potentially, access could have been granted to all of them. The ease of copying, distributing and searching these cables, together with the difficulty of managing access to electronic documents, makes Cablegate emblematic of the transformed environment created by movement of documents from paper to electronic form, where massive numbers of documents can be copied, distributed and searched with widely available computer systems.

The significance and moral status of Cablegate is energetically debated, but it is indisputable that it is the transformation of the information environment from paper to digital media which made it possible. Wikileaks could not operate in a non-electronic environment. The computerisation of modern society, whilst offering a level of access to information and ease of communication that was in the realm of science fiction 50 years ago, has created problems for recordkeeping in organisations through decentralisation of specialised functions. For individuals, problems arise through rapid change in storage hardware, data formats and applications to read data. Failure to recognise and deal with these could result in the present becoming unexpectedly inaccessible in the future.



Document Control climbs into the cloud

A job ad recently posted online calls for "an understanding of Document Control as it pertains to the Oil and Gas industry particularly in the field of Engineering and Construction." What are the unique requirements of such a role? To find out, IDM consulted a selection of senior Document Control Professionals working across the country and internationally.

In its broadest definition, Document Control is something that every organisation is hoping to implement with the introduction of some form of document management. However in specific industries a much tighter definition is called for, as the importance of strong and detailed understanding of a document's history, versioning and collaboration is critical.

A simple definition is that Document Control ensures that current documents are approved by the competent persons, distributed to the places where they are used, and that old and obsolete versions are removed.

In broad terms, document control provides a means of managing the development, approval, issue, change, distribution, maintenance, use, storage, security, and disposal of documents.

In project-driven industries such as engineering and construction, mining and exploration, document control is vital to the ability of multiple commercial entities to come together and work harmoniously on vast multi-year projects.

Construction and engineering projects can generate "tens of thousands" of drawings, documents and schedules that can be a headache to manage.

Inefficient document control and document management processes are the greatest detriment to compliance for companies doing business in regulatory environments.

In lengthy projects that can involve many partners, and range up to the billions at stake, the stakes are high. The penalties for inadequate management of this process can be severe.

CH2M HILL

Belinda Burton, Head of Document Control Australia & New Zealand at CH2M HILL, through experience believes that for most organisations, the first indication that something has done wrong with document control processes won't be picked up until it's far too late, and if the organisation is rigorous on quality and process the fault will likely be human error.

"The quality of your processes and systems are paramount to the success of a project," said Burton

CH2M HILL is a global giant of engineering, procurement, construction and operations with more than $7 billion in revenue and 28,000 employees worldwide,

Organisations such as CH2M are audited by SAI Global for their compliance with the ISO: 9001 series of quality standards for quality management systems. While undertaking large collaborative projects these document control processes are also audited systematically internally and by other joint venture partners.

The job of Document Control is often to manage everything from pre-project implementation such as an RFP documentation at conception through to engineering drawings, plans, contracts and even daily construction site activities.

"Increasingly it is becoming an automatic choice to go with a cloud based or SaaS alternatives for approval, workflow and revision control systems, especially in joint venture scenarios" said Burton.

"The reason being a project could have contributors anywhere, Australia, India, Hong Kong or Mexico. All needing to access information in real time, even if only to check it's progress in a work cue. Once a tender has been awarded often the Document Control structure needs to be in place and functioning in a matter of days, that all of the joint venture partners agree upon.

"Data vendors selling in this industry are often ex-engineers, this makes for a greater understanding of the challenges faced on EPCM (engineering, procurement, and construction management) projects, at the $20 million or heading towards the billion dollar level" - Belinda Burton, Head of Document Control Australia & New Zealand at CH2M HILL

"Increasingly jobs of a joint venture nature have firewall issues, compounded by remote locations. It is so much quicker to go straight up to the sky, so to speak"

"Documents can also be moved in bulk with greater ease and projects once completed can be quickly dismantled and disseminated to their permanent systems/networks"

When selecting a cloud-based Document Control platform for a large project there are a range of global platforms that get the lion's share of business. Leading contenders in this space include: ACONEX, Bentley eB, Field Automated Communication Systems (FACs), Primavera (PCM), and QA Software's TeamBinder.

It is also common to have a customised deployment from a vendor such as OpenText, HP Autonomy or EMC Documentum commissioned for individual projects.

Cloud document collaboration makes it easier for multiple people to access documents, to read or edit, in real time. It is (or should be) much more secure and timely than sending emails back and forth.

"At OpenText we are seeing more and more deployments which are cloud based. The two key drivers are the quicker speed to deployment, greater access and collaboration across internal and external stakeholders and more scalable pricing as projects ramp up and down," said Kevin Hayes VP Sales A/NZ.

Major cloud players and SaaS providers now offer Document Control the ability to generate templated emails out of Outlook which hook into the main repository and are retained as permanent records.

They also simplify the process of creating a searchable archive of all documents related to an individual project available for the joint venture partners to store as an archive.

In fact CH2M HILL relies on these repositories for ongoing management of project archives, while it uses network files storage and SharePoint for its own internal collaboration.

Jacobs Engineering

Currently working on the Rio Tinto Iron Ore Expansion Program at the Pilbara in WA, Chartered Professional Engineer Paul Nathan is Integration & Assurance, Document Control & Risk Manager at Jacobs Engineering.

With 2013 revenues of nearly $12 billion, the firm is one of the world's largest and most diverse providers of technical, professional, and construction services.

Nathan believes there are some key challenges emanating from a lack of appreciation or understanding from Project Managers, Directors and Clients as to what Document Control is all about and the unique demands.

"This results in poor planning and resourcing for document control activities; Further the risks related to poor document control practices are not understood in full by project managers/directors resulting in alarming non compliances and gaps in how documents are controlled and managed in projects.

"Poor support for document control requirements from Project Engineers results in exhaustive hours spent by document controllers in expediting vendors and clients. This is a follow on effect from project managers/directors themselves not having the required appreciation for document control and its requirements;

"Both of the above contribute to a stressed document control workforce that often has some high degree of turnover in some organisations and poor morale.

"Inadequate or ineffective document control software systems are often employed for projects, which limits the execution of effective document control practices. Often the reason for such software having been employed is because of the people who were entrusted to scope and implement such systems themselves are not fully appreciative of the requirements of document control.

"Vendors and contractors similarly have poor appreciation and understanding of document control - hence the cycle continues."

Lend Lease

Geoffrey Brookes, Document Control Manager at Lend Lease - Infrastructure Services, believes there are five essential Information management skills required by a Document Control specialist.

1) Attention to detail;

2) Able to communicate;

3) Ability to read a drawing or document and understand the revision, status process;

4) Ability to organise information – understand how and why information is stored and delivered ; and

5) Knowledge of the industry you are working in and how information flows in that business.

"Document control tends to be a project driven environment – so the challenges are driven by projects and the project requirements but they can overlap into document management," said Brookes.

"You need to have senior management on side, so have a business case that tells them 'this is the cost of the project if you don't use a document controller and this will be the cost if you do use a document controller' How much does it cost an organisation if they lose that plan or contract? What is the value of the documents? When you tell them those documents are worth $5 million dollars then they take notice!

"You need control of information incorporated as part of the business process.

"The trouble is that we work with humans and not all think the same – so this is never easy. You can set up whatever system you like but there is always a grey area!

"As an organisation you have to know and define a control document/data, etc. It's normally a document that needs to be sent from the organisation (an organisation could be a business group (even an individual) or a business) or a big organisation company or government body

"It is at this stage the "document" needs to be controlled in the EDRMS or document control system. Here is where you get the revision, document version control issues, etc."

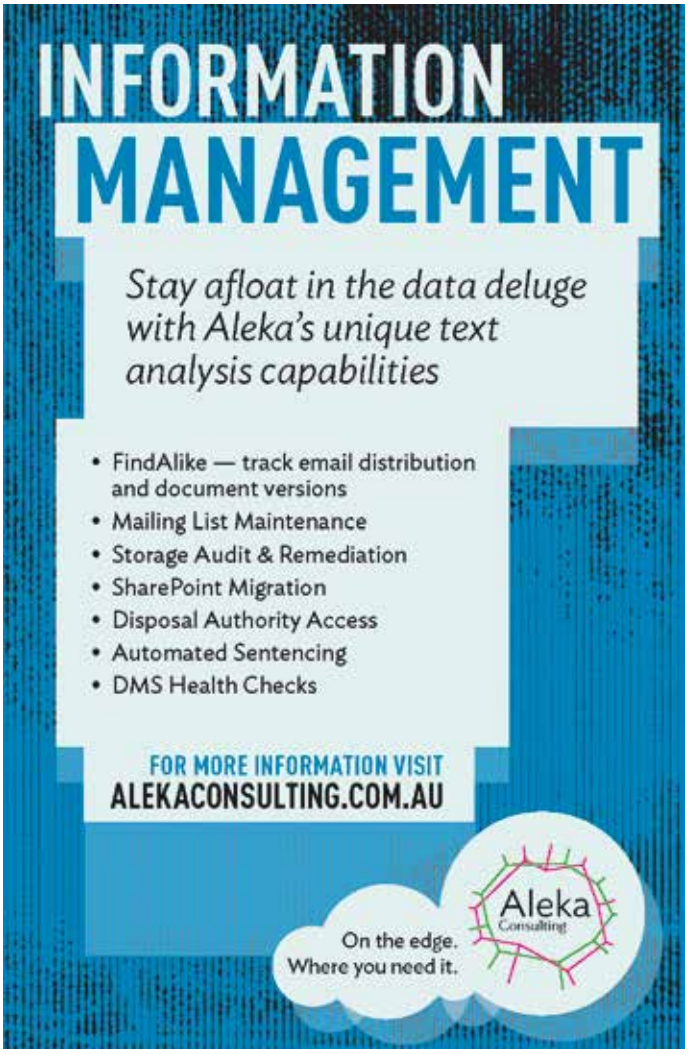
A recent study by PennEnergy pointed out that the implementaton of good information control and governance could trim 1.5% off the top line of a project. When dealing with infrastructure projects running into the billions, small percentage cost efficiencies can dramatically result in millions in savings, let alone the managing the compliance risk and litigation potential.

What makes engineering document management so special and different comes down to the type of data the system is managing, according to Oleg Shilovitsky, who holds a hold a PhD in CAD Systems and blogs about the topic at beyondplm.com.

"It is about CAD models, Drawings, Design, Simulation, etc. This data is semantically rich and contains lots of connections and constraints. To manage versions of Excel files is easy. Many document management systems can do so. However, to manage versions of SolidWorks or Inventor assemblies is not so simple. You need to track dependencies between parts, drawings and other elements of interconnected data.

"What is my conclusion? Semantic complexity makes engineering document management complicated. It is all about connections and data dependencies. This is a specialty of engineering document management software. To manage revisions of interconnected files is complicated. It cannot be done on a level of single file and requires different approach. Engineering Doc-

(Continued over)



Document Control

(From previous page)

ument Management (today mostly known as PDM) is a special class of data management solutions used for this purposes."

CH2M HILL's Belinda Burton emphasises that a Document Control professional must be able to interact with the end user in a very specialised industry.

"To deliver a quality product you have to interact with the end user, you have to know what they're doing with the data and how they are applying it to be able to assist users by designing processes that work for them, and for your organisation There is little value in sitting in an office designing a detailed process that works for a document controller and a system, but is almost unworkable on a construction site"

> "Document Control is often confused with records or document management" - Deborah Wilson, neXadyne

"It really helps document controllers provide clients with a quick ROI, via out of the box tools that are available in our marketplace, tried, tested and tailored to our unique needs. Data vendors selling in this industry are often ex-engineers, this makes for a greater understanding of the challenges faced on EPCM (engineering, procurement, and construction management) projects, at the $20 million or heading towards the billion dollar level"

Deborah Wilson has extensive experience in Document Control training as a co-founder of neXadyne, an Australian Document Control consultancy and Registered Training Organisation (RTO).

"Document Control is often confused with records or document management," said Wilson.

"Document Control does indeed reside within the domain of Document Management but has a very specific set of processes.

"Previous revisions of controlled documents are records and are managed as such – they are static and can't be changed.

"Document Control does not manage 'versions', we manage 'revisions'. A version is created each time you save changes to documentation; a revision denotes each time that documentation has been through a review and approval cycle.

"Document Controllers do not update the actual content of documentation – unless they are included on the review/approval cycle. We manage the documentation but cannot change it."

neXadyne has submitted a proposal to Standards Australia for the development of a national Standard for Document Control.

Aconex

Aconex construction project management software has been selected to support the construction and operation of Roy Hill, one of Australia's largest integrated iron ore mining, rail and port projects. Located approximately 115 km north of Newman in the Pilbara region of Western Australia, the Roy Hill mine has a total resource of more than 2.3 billion tonnes of average +55% Fe iron ore over a mine life of at least 20 years, with the first shipment scheduled for 2015.

"The Roy Hill project is a strategic win for us in the Australian mining sector," said Steven Brant, general manager of Australia and New Zealand at Aconex. "It's a complex project with a wide range of stakeholders and multiple assets to be built. The owner is committed to the use of proven technology to reduce risk and ensure successful project delivery. ."

According to Brant, Roy Hill and the majority of its contractors are now using the Aconex platform as a single source of project information management and collaboration for the construction and operation phases of the project. The platform is currently being used by approximately 23 different organisations involved in the project, and this number is likely to grow as additional operational contracts are engaged.

"Mitigating risk in construction projects between different organizations requires a systematic approach to the causes of risk. A key cause of project risk is project teams mistakenly working with out-of-date documents," notes Tod Bottari, Communications Director at Aconex.

"Version control helps ensure that collaborating team members are working on the latest revision of a document. "

Bottari believes construction document management software should support five principles for sound version control:

- A project-wide document numbering system. Participants should agree on this at the start of the project to avoid confusion resulting from multiple internal numbering systems.
- No duplicate document numbers within the same project. Participants should agree on protocols for registering identical documents in more than one format – e.g., file name suffixes to identify file types (PDF, DWF, ZIP, DWG, DGN).
- A consistent revision coding system. Participants should agree on this as part of the project-wide document numbering system. Revision codes can be numeric (1, 2, 3), alphabetic (A, B, C) or a combination of the two (A1, A2, B1, B2, C1, C2).
- Sequential coding of revisions for the life of documents. This enables all participants, including those not involved in the creation of a document, to understand how different versions of documents relate to each other.
- Clear identification of revisions within a document. This can vary depending on the format of a document – e.g., revision clouds with letters for drawings, tracked changes for Word docs, coloured text or cell backgrounds for Excel documents, etc.

Revisions should be annotated with the current revision number and date on the document or drawing cover. Each annotation should include the reason for the revision – e.g., coordination between disciplines or the owner's instruction to make a change – which supports cross-checking for cost control and variation management.

"Document management software that tracks document revisions chronologically by issue date helps reduce the time required for project teams to review and compare historical information. Conversely, a document version control process that is inadequately planned or managed can cause changes in design, scope of works and materials to be overlooked, impacting all participants and multiplying project risk," said Bottari.

Some of these impacts can include:

- Unidentified changes can mislead the owner, making it difficult to manage expectations.
- Project teams can lose confidence in the reliability of documents, which adversely affects the efficiency and quality of collaboration between them. For example, flawed revision control in the design phase can make tender information incorrect, which increases the number of requests for information (RFIs) and tender queries, as well as overall uncertainty and financial risk.
- Document updates can take more time, which requires substantiation of both time and cost increases due to earlier information mismanagement.

"If contractors and subcontractors perceive increased project risk because of issues with document quality, interdisciplinary coordination or version control, their RFIs and tenders will reflect this.

"All project participants should be able to compare historical versions of the same document. This can be difficult and time-consuming, even more so when an annotation of changes is unclear or missing. Electronic comparison of sequential versions makes the process fast, easy and accurate," said Bottari.

Get Ready to Sign on the Digital Line

By David Schulz

Signatures are one of the last barriers in many organisations to working completely electronically. The need to print things just for a "wet" signature is rightly identified as a waste of paper, consumables and more importantly time.

While many are actively considering digital alternatives, there are widespread misconceptions of the cost and complexity of introducing digital signature capabilities.

Firstly, it must be recognised that the traditional wet ink signature is in many cases overkill for the legal requirements of a particular process. In Australia, the Electronic Transactions Act lays out some useful tests for considering the suitability of your electronic signing method. One of these refers to the method being 'as reliable as appropriate'.

In the past an internal work instruction may have been communicated by a signed memo. Does this mean an email from a manager should be signed? Probably not. It is reasonable for the person receiving a directive via email to assume the manager complies with the organisation's policies on protecting their password. So the instruction is probably authentic in that only the person with access to that email account could have sent the message. It is also unlikely that a message that has only traversed the internal mail server has been modified in transit so the content is probably reliable.

It is worth tempering this general conclusion with the legislative test - 'as reliable as appropriate'. If the email from the boss is directing me to order a ream of paper I'd be happy to follow through on the basis of the email. If the email is authorising a purchase over the tender limit I might be tempted to get a little more durable form of authority.

This example highlights the value of a signature. It gives us a sense of authenticity - confidence in identity and reliability - confidence in content.

Some organisations are pursuing process-based methods to provide this authenticity and reliability. The idea is that the audit trail in a workflow system or a records management system provides the evidence of the sign off or approval of a document.

Now while the document sits within this system, the process-based method provides a reasonably reliable method of electronic verification. The shortfall in this method is that it relies completely on context. As soon as the document leaves that system it has neither authenticity nor reliability.

If documents need to be supplied in response to a legal discovery process or supplied to a third party for advice (a consultant, your solicitor or barrister), they won't have access to your system and that context of audit trails. So effectively they receive an unsigned, uncontrolled copy of those documents.

The value of digital signatures is they provide self-contained authenticity and reliability. Someone receiving a digitally signed document from you can objectively verify the content is unchanged since signing and can verify the identity of the signatory. This can be done using any software that reads the file type and supports the digital signature standard.

The digital signature is embedded in the document and travels with the document. The digital signature is self-referential, containing all the information required to validate the signature without any reference to the organisation or system that issued the signature.

PKI-based digital signatures are the only form of electronic signature that provide this level of long term authenticity and reliability, and are now available as simple and inexpensive web based services. These services assume responsibility for all the management of generating key pairs, establishing the certificate authority, managing the expiry of certificates and hiding all the complexity making it as simple as 'click here to sign'.

Documents can be signed online for about $1 per document. This is probably less than the postage needed to mail the documents without considering savings in paper, print consumables and time. Signing up for a hosted services takes just a few minutes. Hosted signing services provide a range of capabilities over and above simple signing of documents. You can put your document through a signature workflow with the system issuing the invitations to sign, automating reminders, providing copies of the signed document to all parties and providing you with a dashboard of current signing processes.

Mature digital signing solutions augment online signing capabilities with on premise signing capabilities that allow signing of documents directly within MS Office other common desktop software tools. Implementing an on premise digital signing appliance is typically achieved in a few days to a few weeks.

Not every current use of a wet ink signature should require a digital signature. There are simple, low risk situations where a less secure electronic signature may be suitable. For situations where you need confidence in the authenticity and reliability of an electronic document there is no substitute for a digital signature.

David Schulz is Market Manager Australia for Secured Signing for Documents

The CEO View: Capturing the World

Australia's Outback Imaging has been providing advanced document batch scanning solutions since 2002 under the EzeScan brand. IDM sat down with CEO and founder Mike Kirby to find out what are the main challenges coming up in 2014.

MK: With our expansion into Europe and North America, and our ongoing solid growth in Australia and New Zealand, we have been experiencing some 'growing pains' internally in the company which we expected to happen. We now effectively operate 24 x 7 across three diverse geographic regions of the world, reselling and supporting our EzeScan Software.

"In this global market it is important that we strive to develop and sell an innovative product that solves real world business problems associated with document imaging, metadata capture , email record capture with 'out of the box' integrations.
We need to continue to listen to the needs of our customers, business partners and our staff who ultimately are responsible for our success." - Mike Kirby.

This expansion means we are investing more time, money and personnel in ensuring that our IT systems are online 24 x 7, with multiple levels of system redundancy in place.

To cope with the increased traffic we recently completed the implementation of a high speed Internet connection in conjunction with a content distribution network to ensure that our customers and resellers can quickly access the resources we provide on our EzeScan website from anywhere in the world.

We are continually reviewing how we can use Development tools, IT Hardware & Software, Unified Communications and Social Media to help give us a competitive edge in the marketplace.

In addition to the number of customers and installed seats of software having grown, we have needed to expand our support team by hiring additional team members with specific EzeScan expertise.

We recognise that customers expect our support engineers to be the 'EzeScan Experts' and that they need their queries resolved quickly. Our goal is to deliver a 'great product with great service in a timely manner'

There is a wealth of corporate information still locked up in paper documents and in emails.

IDM: Many of your local customers would not be aware of your growing presence in the international market, what's happening there?

MK: In 2008 we took the first move into the international market by opening an office in the UK. The UK is driving the expansion of our business in the UK and Europe. In mid-2013 Outback Imaging USA was launched to handle sales and service enquiries from the USA and Canada.

We are seeing an increased level of sales in those overseas markets and throughout 2014 we will continue to invest and deploy more company resources in those regions as they grow.

IDM According to a recent report The Global Document Capture Software market will grow by almost 10% annually for the next 5 years. According to the report's authors, "One of the key factors contributing to this market growth is the need for regulatory compliance." What is your perception?

MK: Yes I would agree with that. In our primary market 'Records Management' this has always been the key driver for the adoption on of scanning/imaging technologies.

The traditional early adopters were local, state and federal government agencies that were legally required to manage the lifecycle of their paper and electronic records. In the last few years we have found this requirement is now expanding into commercial companies.

Businesses are now starting to see the importance of managing their business data properly, and not just from a regulatory compliance standpoint.

There is a wealth of corporate information still locked up in paper documents and in emails.

That information can be unlocked by document capture products such as 'EzeScan' thereby providing a real competitive edge to those businesses.

IDM What are the main reasons organisations introduce document capture?

MK: The key drivers for adopting document capture are:

1) Legislative compliance.

2) Leveraging the information that is locked up in paper records and emails.

3) The desire to share documents between many people across all parts of an organisation, locally, nationally and internationally.

4) Reducing the lifecycle and storage costs inherent with dealing with paper documents.

5) Achieving operational efficiencies by workflow enabling the processing of those scanned documents.

6) Improving customer service response times and outcomes by having captured images and email information available during the service call.

... with OCR the text layer becomes another information layer that can be searched when mining for critical corporate information.

IDM: How many organisations are exploiting the capability for scanning and OCR to automate business processes?

MK: The take up of document capture is still increasing, as more organisations are starting to recognise the value in capturing their documents in 'text searchable PDF format'.

The key advantage being that PDF images are an exact replica of the scanned page images, with the additional benefit of a text searchable OCR layer.

This text searchable layer when used in conjunction with an EDRMS or ECM system that support document content searching provides a much higher level of searchability, than just searching on metadata only.

Without OCR the image is just a picture, but with OCR the text layer becomes another information layer that can be searched when mining for critical corporate information.

IDM: The report also identified the emergence of SaaS-based document capture software, is that having a big impact?

MK: At this time we are not seeing this SaaS-based document capture software making many in-roads into the document capture market here in Australia. Whereas in the EDRMS and ECM markets many of the vendors are offering SaaS offerings for document management and customers are moving some of their information onto those SaaS platforms.

The great news is that our EzeScan software can be configured to scan into those SaaS offered platforms. But what we are finding is that our clients are typically buying and installing our software at their own premises and scanning to the SaaS hosted EDRMS/ ECM platform.

IDM: Is this a real alternative and what are the issues users need to watch out for here?

MK: For some clients SaaS-based document capture software is definitely an option, but I personally believe that research needs to be done first to see if it meets all the needs and requirements an organisation has.

To give you an idea from a document capture perspective I would be asking the following questions:

- Does the system comply from a legislative perspective?
- Which country are the scanned documents actually residing in?
- How secure are your scanned documents?
- What about document retention and disposal?
- What happens to your content if the SaaS vendor goes out of business?
- What happens if the SaaS vendor system is unavailable due to system or network outages?
- Who is doing the data indexing?
- What guarantees are offered regarding image quality and data quality?

IDM: You and your team attend many local and international tradeshows what are the issues you find people want to talk about? What are the problems they need solved?

MK: In 2013 we attended over 30 tradeshows worldwide to showcase our 'EzeScan' product. In 2014 we will continue to exhibit here in Australia and will be expanding our presence at tradeshows overseas to align with the growth we are experiencing in those areas.

Some of the larger conferences we have coming up are Info-Centrim in New Zealand, CeBIT 2014 in Australia, HPIGF 2014 in Australia, DocuWorld 2014 Conference in Las Vegas USA and the IRMS Conference 2014 in Brighton UK.

Tradeshows are the place that customers come to find solutions for their document and email capture problems. They often have a specific issue that they need to solve. We simply take the time to engage with them, listening to their needs and then if we believe EzeScan can provide them with a solution we deliver a short product demonstration to them so they can 'visualise' how it might work.

GIS and SharePoint form tag team for Santos

At the 5th Annual Australian SharePoint Conference, oil and gas producer Santos will outline a solution it has implemented to automate the tagging of documents held in SharePoint through integration with an Oracle Spatial Geographic Information System (GIS).

Santos required SharePoint-based content to be associated (tagged) with GIS data objects. Meanwhile users of the GIS need to be able to quickly assemble a query that can return relevant content stored in SharePoint within the context of a GIS entity.

Previous efforts to provide a GIS tagging capability for SharePoint suffered from a number of drawbacks including a lack of Filter and Grouping Support. Also, the use of custom Field Types in SharePoint would complicate any future upgrades by Santos from SharePoint 2010. In order to address these issues, Teraterra and Kaboodle software teamed up to develop a more scalable, robust and flexible solution. Teraterra and Kaboodle Software are both independent software companies working in the Adelaide metropolitan area which specialise in Oracle Spatial (GIS) and SharePoint technologies respectively.

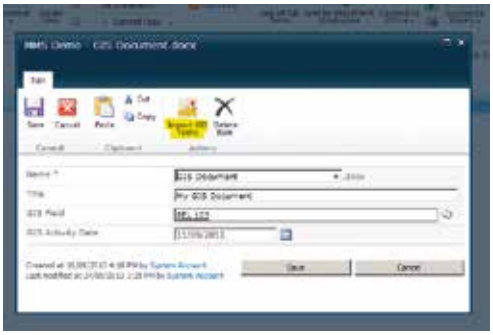
Santos required a solution that would improve information discovery for both GIS and SharePoint users and enable GIS data to be used for data filtering, grouping and search refinement.

It needed to extend the UI of both the GIS and SharePoint, surface SharePoint search capability in the GIS and facilitate the tagging of SharePoint documents with GIS data attributes. Santos also required that it be easily upgradable to future versions of SharePoint and the GIS.

Kaboodle CEO Colin Gardner said, "Santos had implemented an earlier solution which placed too much of a tagging burden on SharePoint users. Documents had to be tagged with up to a dozen GIS properties using custom field types with a one-to-one mapping that had to be manually selected by the user.

"The new solution we have developed uses the Managed Metadata Service (MMS) in SharePoint 2010. But instead of having the MMS/taxonomy tags created manually by somebody, we came up with a way for the creation of those to be actually be done by the GIS.

"So what actually happens is that when a user tags a document with a GIS object, behind the scenes an event handler files those synchronously without the user even being aware. That GIS web service then says "You've tagged this document with this GIS object, let me go away and find out what I know about this object".



The Import Term Button shows in two locations, namely the Document Item Property Edit Page and the Connect & Export group of the Library Ribbon as shown above and at left.

This screenshot shows both the primary GIS field and the secondary fields Basin, Field, Permit, State and Well which have been populated with values returned from the GIS Web Service

"So it calls the GIS web service with its ID, and then the Web service returns a whole bunch of properties about this, whatever the user's tagged it with.

"So if a user tags a document with a geographical property called 'Mayfield Downs' for instance, the GIS web service says "Yeah, I know that what state this is in, I know who the land owner is, I know the geographical boundaries of this property, I know the address of the land owner, I know contact details, etc. And everything it knows that resides in the GIS then gets returned back to SharePoint. It becomes like a self-tagging system. So once the GIS data is in SharePoint then, you can exploit it with search and filtering and indexing, etc.

The era of search-enabled apps

As organisations have matured in their use of the SharePoint/Office 365 platform, so too has the reach, sophistication and need to architect business solutions meeting the needs of ever growing content, security and solution scalability. The implementation of a solution with a scalable information architecture and meeting the critical business requirements of security is often at odds with usability and ultimately end user adoption.

Fortunately, enterprise search has also matured and is the key to achieving successful solution adoption by end users while still being able to architect solutions with a viable information architecture. At the SharePoint Conference in Las Vegas (March 2014), Microsoft announced a Microsoft App, codenamed Oslo based on the upcoming Microsoft graph technology. This is just one example where we can extend the power of search and social insights to deliver relevant content to end users, bringing about greater productivity and engagement.

In another example, imagine an enterprise-wide SharePoint solution such as a Project or Legal Case Management system with an information architecture comprising of multiple site collections (for security boundaries), thousands of sites (each site representing a Project or Legal Case), a number of document libraries within each site with potential for thousands of document sets or folders. How do end users efficiently locate a SharePoint location (representing the Project or Legal Case) to save or access content? The traditional metaphor of browsing is too cumbersome - sophisticated, personalised search-enabled solutions are the answer.

Australia's Scinaptic Communications is preparing to launch its OnePlaceLive solution with patent pending technology for the delivery and end user experience to efficiently engage with enterprise SharePoint solutions.Principal and founder James Fox will be outlining the solution and providing a functional demonstration at the SharePoint Conference being held in Sydney and Auckland in July. He welcomes questions at www.scinaptic.com/connectwithjames

Re-Imagining Effective Work

Moving Beyond the New Efficiency to Greater Effectiveness

By Michael Sampson

In organisations where the IT Department equates success for new ways of working with installing the software correctly, all the great stuff doesn't happen. Employees ignore the new capabilities and keep using current tools to get their work done in historical ways. Or they make a minimal effort to comply with the IT mandate to "use SharePoint," but do so only for the most mundane of work processes. Although the organization has at its disposal new capabilities that offer transformative possibilities, they are relegated to insignificance through lack of imagination.

Re-imagining effective work is a double-loop approach to seeing the opportunities for improvement within an organization in light of new capabilities for how work can be done. In the first loop, the ability to see opportunities is enhanced by understanding the capabilities of new collaboration technologies, such as Microsoft SharePoint and Lync, IBM Connections and Sametime, and real-time collaboration tools from Cisco. In the second loop, new collaboration technologies are explored for their possibilities in transforming work practices, not because they happen to be the latest feature-rich whizz bang gadgets.

A great example of re-imagining effective work comes from Cisco in Canada and North America. As is common with high-tech firms, Cisco used a multi-tier approach in its sales strategy, with a large number of salespeople complemented with a smaller set of technical sales specialists. At the appropriate point in the customer's buying cycle, the salesperson would invite a technical sales specialist to provide an on-site demonstration to a client or answer their specific technical questions. The incumbent approach was to tie a technical specialist to a specific geographical region. As a consequence, sales specialists spent their time travelling to and from client sites, and had to frantically work to keep up with a broad range of product-specific material. Sales people had difficulty finding the right specialist for a client interaction, and scheduling a client visit could take weeks, all of which prolonged sales activities.

When looking at this organizational problem, you could try to solve it by driving sales specialists to work harder, by hiring more sales specialists, or by using a fancy scheduling system to reduce time lag between request and delivery. What Cisco actually did speaks to the power of imagining a better way. First, the allocation of sales specialists to a geographical area was eliminated, and a new model introduced where sales specialists provided support remotely using Cisco's online meeting, video, and telepresence capabilities. Second, a new way of identifying the best available sales specialist for a given client opportunity was introduced to the sales people. While a local sales specialist - from a geographical perspective - may be able to answer a question, if they are otherwise busy the query can be addressed to all of Cisco's sales specialists across North America, and the best qualified and most available specialist could address the question.

These changes had benefits across multiple dimensions. Sales specialists had to travel less, which reduced Cisco's travel expenses and helped with work/life balance for the specialists. It became more possible for sales specialists to focus their attention on a specific product, building deep knowledge and skills in a focused set rather than having to address a broad range at a shallow level. Sales people gained better and faster access to sales specialists across North America. Clients benefitted from being able to engage directly with the best sales specialist across the region, and with less drag between agreeing to a meeting and being able to host the meeting. By re-imagining what effective work looked like, Cisco, its sales specialists, its sales people, and its clients were able to achieve a win-win-win-win.

Structural changes of this nature in work and organizational life are possible in light of new capabilities from collaboration technology, when applied with appropriate imagination and foresight. My current burning question is how to encourage changes of this nature and type among organizations. What is the mindset, toolkit, and exemplars we can draw on in our work with tools like Microsoft SharePoint and Lync to re-imagine effective work, not merely introduce a nicer filing cabinet or cheaper way of calling. I will be exploring this question during my presentation at the upcoming SharePoint conferences in Sydney and Auckland in July.

Michael Sampson is a Collaboration Strategist who works with end-user organizations on Making Collaboration Work, with focus areas of culture, governance, and adoption. He will be speaking at the upcoming SharePoint conferences in Sydney and Auckland on Re-Imagining Effective Work. Michael will also be facilitating pre- and post-conference workshops based on two of his books - User Adoption Strategies (on the Monday before the conferences) and Collaboration Roadmap for Organizations with SharePoint (on the Thursday after the conferences). Visit Michael on the web at michaelsampson.net.

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A SELECTION OF SESSIONS ON OFFER AT THIS YEAR'S SHAREPOINT CONFERENCES

SharePoint as the Canvas for Student Creativity

Lou Zulli Jr.

See how one US High School enabled school students to deliver enterprise quality solutions built on SharePoint that made a real difference to the campus community.

Re-Imagining Effective Work

Michael Sampson

New technologies of all kinds are often applied to known processes, bringing automation and efficiency. While there is nothing wrong with that, the real gain comes from re-imagining what work looks like, and how to bring improvements beyond mere efficiency. Michael explores this idea as it relates to new collaboration and social tools, and provides practical guidance on being able to re-imagine effective work.

Santos Case Study: Santos ties together GIS and SharePoint

Kirsty Reschke (Santos), Colin Gardner (Kaboodle Software)

Energy and mining company Santos outlines the method it has implemented to tag documents with geo-spatial attributes so as to improve information management and discovery.

Power BI - What is it, How it Works, and Why it Matters

John P White

Power BI Is the latest offering in the BI space from Microsoft. This session will describe all of the various components of the product known as Power BI (including the Office 365 features), describe their purpose, and how to get them working together.

An Interactive Learning Experience for Office 365

Stefano Tempesta

This session describes how to introduce gesture-based interactions and voice recognition as part of a class program in a school.

PSA Case Study: A SharePoint Solution for Strength and Solidarity

Matthew O'Driscoll (PSA), Stickney Kunanayagam (Inov8)

Wellington-based developer Inov8 deployed a SharePoint solution that helps organise New Zealand's largest union: The Public Service Association. With over 58,000 members, the PSA's intranet needs to be a mixture of document libraries, reports and time-saving tools.

Information Architecture Decisions, and Rainbows

Bryce Saunders

This informative session explores several common decision spectra in SharePoint Information Architecture and gives you some techniques for deciding where on the spectrum your situation lies.

AUT Case Study: Designing and Deploying SharePoint in Tertiary Education

Alan Marshall (Provoke)

In this session, Auckland University of Technology and Provoke will lift the hood on AUT's SharePoint journey - from a single faculty deployment to a full rollout of records management and workflow.

Melbourne Water Case Study: Engaging your Organisation in an Intranet Rebuild

Rebecca Jackson

How methods such as workshops, personas, training and a strong project governance structure ensure that an intranet for Melbourne Water was built with user needs at the core.

Reporting and Dashboarding using Microsoft BI

John P White

This session will focus on what the various reporting and dashboarding tools from Microsoft can do for you, where you should use them, and how to get them working for you. Both on-premises and cloud-based scenarios will be discussed.

How to Create Successful SharePoint Intranets

James Robertson

SharePoint intranets go far beyond the traditional roles of storing content and publishing news. Collaboration is now a key consideration, as is business process automation and mobile delivery. This session outlines a practical methodology drawn from the experiences of the thought leaders in the intranet space.

KiwiRail Case Study: Mobility that Really Matters

Helen Bennett (ILC), Craig Anderson/ Robert Hill (KiwiRail)

The rail industry is highly regulated. Field staff need to know what maintenance is being carried out on the network and have access to applicable procedures and codes of practice. Find out how the KiwiRail intranet is replacing manual and paper-based processes.

How to use a Team Site Effectively for Collaboration

Benjamin Niaulin

After a few years with SharePoint and many implementations of the platform both successful and failed, Benjamin will share his experience on Team Site Collaboration.

Introducing Project "Siena"

James Milne

With the release of Project "Siena" business users can now create rich interactive applications for Windows 8 which integrate and leverage your existing assets in SharePoint and Azure.

Creating Responsive Designs for SharePoint 2013

Brian Farnhill

How do you get SharePoint looking good on a small screen? In this session you will learn about the benefits of responsive design in detail, how to implement it in HTML pages, as well as approaches and considerations for implementing responsively designed master pages and content in SharePoint 2013.

Office 365 and Cloud Identity – What Does It Mean For Me?

Scott Hoag

Join us as we explore Cloud Identity, identity federation, directory synchronisation, and most importantly Azure and its impacts on user experience and access Office 365.

Designing Search for Knowledge Management

Octavia Maddox

Knowledge is an key organisational asset. Designing search to make the most of this asset is a tough task. This session will take you through the myriad of choices to make and how to inform those choices.

Case Study: MLA's SharePoint 2013 Journey

Karen Fox, Ma Abalos (MLA)

Meat & Livestock Australia (MLA) is a research and marketing organisation that selected SharePoint 2013 to create a knowledge platform to transparently store, share and retrieve information across the company.

Information Governance and Records Management

Veli-Matti Vanamo

While there are a number of third-party products, integrations and out-of-the-box options for Records Management on SharePoint, most organisations struggle with end-user adoption for the Records Management Policies and Tools. Join us to see the "art of possible".

Deep Dive into the Content Query Web Part

Christina Wheeler

The Content Query Web Part (CQWP) is still very powerful and used today in SharePoint 2013. This session focuses on pushing the CQWP further than the out-of-the-box configurations.

Wintec Case Study: Curiosity Conquers Control

Kristi Bernards (Wintec)

How did the Information Technology Services Team manage to embed SharePoint as a critical infrastructure within The Waikato Institute of Technology, also known as Wintec? Find out how our simple philosophy of "getting out of the way" is changing the game at Wintec - for both our customers and ourselves.

Laserfiche

Phone: (852) 3413 9898 ext. 812
Email: lfi@laserfiche.com
Web: www.laserfiche.com

Laserfiche Enterprise Content Management (ECM) maximises the value and utility of structured and unstructured information within an organisation. Our solution gives IT departments centralised control over system infrastructure, while offering business units the flexibility to meet their needs.

With document imaging, document management, business process management, records management and mobile applications baked into the core system architecture, Laserfiche makes it possible for organizations to standardize on a single ECM system. Join regular webinars online to learn how 32,000 organisations use Laserfiche to improve customer service and automate business processes to achieve measurable results (Contract Management, Invoice Processing, HR Onboarding, and more).

Laserfiche ECM solution meets the global standard of VERS (Victorian Electronic Records Strategy), and supports Microsoft SQL and Oracle platforms, featuring seamless four-way integration with SharePoint. Contact Laserfiche to tell us your needs, we will be sure to guide you to a team of local experts most suitable for you.

EzeScan

Phone: 1300 393 722
Fax: (07) 3117 9471
Email: sales@ezescan.com.au
Web: www.ezescan.com.au

EzeScan is Australia's most popular production document scanning software solution and product 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. With more than 750 installations world-wide, EzeScan enables its clients to substantially reduce the cost of deploying batch scanning and data capture solutions for documents of all types.

EzeScan works with virtually any TWAIN/ISIS/WIA compliant scanner or any brand of networked MFD, often being selected to replace the software that ships with scanners. With "out of the box" seamless integration with many industry standard EDRMS and/or ECM systems, EzeScan saves both time, money and lowers the risks associated with developing and integrating third party scripting or custom programming.

EzeScan has a proven track record with HP TRIM, Objective, TechnologyOne ECM, Autonomy iManage WorkSite, Open Text eDOCS/Livelink, Microsoft SharePoint, Xerox DocuShare, infoXpert eDRMS, infoRouter, Meridio, Laserfiche and Alfresco. EzeScan solutions range from basic batch scanning with manual data entry to automated data capture, forms and invoice processing.

ABBYY

Phone: (02) 9004 7401
E-mail: sales@abbyy.com.au
Web: www.abbyy.com.au

ABBYY FlexiCapture 10 is a powerful data capture and document processing solution that provides a single point of entry for automatic and accurate conversion of forms and documents into business-ready data. FlexiCapture recognizes multiple languages and automates a variety of tasks, such as data entry, document separation and classification by type—providing the data you need, fast.

Thanks to its up-to-date technology for document classification and data extraction, this software is easy to configure, use and maintain.

The state-of-the-art architecture of ABBYY FlexiCapture 10 allows building solutions that meet a wide range of throughput needs—from cost-effective standalone systems for small-to medium businesses and departments to highly scalable server-based solutions for medium sized and large businesses and government projects. In addition, ABBYY FlexiCapture can be integrated with back-end systems and into specific business processes to improve overall efficiency and reduce costs.

RecordPoint Software

Phone: (02) 8005 8200
Email: info@recordpoint.com.au
Web: www.recordpoint.com.au

RecordPoint was created to cost effectively fill the gaps in SharePoint that prevent it being used as a standards compliant, enterprise grade record keeping solution. RecordPoint addresses the local compliance challenge by leveraging and extending the native document and records management capabilities in Microsoft SharePoint to provide a 100% SharePoint solution that is built to meet global and local record keeping standards that were previously cost prohibitive or technically unfeasible.

By adding capability to the Microsoft SharePoint platform, RecordPoint:

- Reduces the cost and complexity of electronic and physical record keeping;
- Increases the adoption of record keeping processes by users;
- Results in ISO 15489 and ISO16175 compliant document and records management;
- Increases information worker productivity and reduces business risk;
- Enables It platform consolidation, saving cost and simplifying operations; and
- Improves SharePoint scalability, manageability and performance.

Kodak alaris

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www.kodak.com/go/di

From the world's fastest scanners and integrated imaging products to service and support, KODAK Document Imaging creates solutions that meet real-world customer demands.

Today, we are meeting the need for high speed colour output, plus integrated imaging technologies that convert digital files to film... and back. Our mission is to make it easier for customers to manage their documents for less cost -- with greater efficiency, and with guaranteed access to images -- by delivering innovative, customer-focused, and operational best-in-class products and services. KODAK Document Imaging has redefined document scanning with a host of built-in innovations applied throughout the imaging chain. We call it Perfect Page Scanning. It is a perfect example of how we apply Kodak's imaging resources and experience to a whole new application, leading the industry in innovative solutions for digital document preservation. With one of the largest, most experienced service organizations in the industry, our products are rivalledonly by our award-winning service and support

Objective Corporation

Phone: 1800 065 640
Email: enquiries@objective.com
Web: www.objective.com

The Objective ECM solution has been engineered to meet the complex and stringent requirements of Government and highly regulated organisations, which have high volumes of unstructured information, complex business requirements and require flexible deployment requirements. Objective ECM is a comprehensive suite of modules that connects content to people and the business systems they work with on a daily basis. Designed to maximise user adoption with zero training interface options, Objective ECM delivers a simple, fast and personal experience that can be shared on a vast scale. Objective Corporation is an established leader and specialist provider of proven content, collaboration and process management solutions for the public sector.

Our solutions empower public sector effectiveness; efficiency and transparency helping government deliver better services to the community at a lower cost. Through direct customer engagement, Objective is committed to delivering outcomes that have a positive effect on the public sector, its citizens and the community.

Kapish

Tel: (03) 9017 4943
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Web: http://kapish.com.au/

At Kapish we are passionate about all things TRIM. As a HP Software Gold Business Partner, we aim to provide our customers with the best software, services and support for all versions of the Electronic Document and Records Management System, HP TRIM.

We understand that it can sometimes be an all too common problem where document and records management is seen as being just too difficult'.

To help improve this perception we offer easy to use business solutions to overcome the everyday challenges of information governance using HP TRIM.

As a software and services company focused exclusively on HP TRIM, we work with our customers to improve their everyday use and experience with the system.

Designed to bridge the gap between users and technology, our software solutions are easily integrated into existing systems or implemented as new solutions.

Quite simply, our products for HP TRIM make recordkeeping a breeze.

Information Proficiency/Sigma Data

Tel: 8 6230 2213
Email: info@sigmadata.com.au
Web: infoproficiency.com.au/ sigmadata.com.au

Information Proficiency and Sigma Data are at the forefront of Information Management Services and Streamlining Business Processes.

We supply and support HP and Kofax software solutions, as well as developing our own range of productivity and connectivity tools based around Kofax and HP Records Manager (HPRM).

Focusing on Information Management Technology and Services, we work hard to understand our client requirements, and implement solutions to match.

Implementing efficient processes are critical to enhancing productivity, transactional speed, reducing costs and achieving regulatory compliance for your organisation.

Our team of industry certified professionals are able to design and deliver systems to meet your requirements. We strive to build lasting relationships with our clients, providing continuous improvement and mature solutions.

Fujitsu

Tel: +61 2 9776 4555
email fujitsu.direct@au.fujitsu.com
Web: http://au.fujitsu.com/scanners

Fujitsu, as the world's leading document scanner company, with top market share in North America, Europe and Japan for both Desktop and Workgroup scanners, offers compatibility with over 200 different document imaging applications.

The result is state of the art image solutions from innovative portable units all the way to large centralised production environments.

Fujitsu document scanners are renowned for their performance, remarkable image quality, fail-safe paper handling and Fujitsu's legendary reliability.

New innovations include:

- Overhead contactless scanning of fragile documents, thick books and oversized items;
- Ability to input and sort multiple small documents, business cards, etc., just by laying them on the desktop;
- Ultra-sonic and patented ISOP paper sensing technology that prevents batched document damage;
- Mixed batch scanning and automatic paper skew correction capabilities.

Glentworth Consulting

Tel: 1300 634 430
Email: Procurement@ glentworth.com www.glentworth.com

Glentworth enables organisations to increase the value they gain from their information, thereby increasing productivity, promoting growth, reducing transactional costs and enabling process optimisation.

Successful growth of your organisation will directly rely upon the capability to reduce errors, increase quality and make timely decisions.

Information is woven through the fabric of the modern organisation and consequently drawing the secondary value of this strategic asset will play a critical function if costs and waste are to be contained.

Glentworth is a trusted partner of organisations across the commercial, not-for-profit and government sectors. Our consultants have proven capability in providing innovative and effective data, information and knowledge management solutions across sectors and problem domains.

We carefully discover the circumstances of the situation and design a fit-for-purpose approach to fit those circumstances. This allows informed decision making to choose the right techniques that help achieve the outcome.

Glentworth has a particularly strong track record across industry sectors and its consultants have proven capability solving the most complex of data and information problems. It also specialises in disaster management, public safety and security and has worked across Australia in these vital areas.

Glentworth is known as an ethical business with a strong sense of social responsibility, which it demonstrates tangibly and consistently.

The company is Australian-owned; and its staff are personally and passionately committed to delivering quality outcomes to clients.

Aleka Consulting

Ph: 0414 243 614
Web: alekaconsulting.com.au
Email: info@alekaconsulting.com.au

With a unique knowledge base in text analysis and storage technology, Aleka provides products and services to let users work more effectively with email, electronic documents and document management systems.

FindAlike – Office Add-in using near-matching technology to find email recipients and senders for the same message, find different versions of the same document, and suggest recordkeeping containers based on content.

AK Disposal View – Web-based access to disposal authorities to minimise 'donkey vote' filing.

DMS Health Check – find misfiled documents in your DMS

Mailing List Cleaning - identify different name/address representations, dead and relocated recipients and save postage.

Storage Audit and Remediation – find out what and who is filling your storage and painlessly reduce it.

SharePoint Migration – much more than drag and drop! Flatten folder trees, de-duplicate, deal with naming rules, map permissions.

Facet Folders – metadata-based browsing of disordered data.

Rule-based Sentencing – apply rules to file names, folder names and text content to speed document sentencing.

acrodata

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acrodata is a multi-award winning records and information management (RIM) solutions provider helping organisations in government, professional services and corporate sectors to better store, access, share and protect their critical records and information. Offering more than just software solutions, **acro**data provides businesses with a suite of RIM services, catering for all records management needs. Our three main services divisions are; document digitisation services, such as records scanning, digital conversion and digital printing; specialist RIM consulting on matters such as digital strategy, digital workflow and compliance with statutory obligations and; sourcing and implementing electronic document and records management systems (EDRMS) and enterprise content management systems (ECMS). Through this combination of solutions **acro**data offers one of the most comprehensive and tailored records management services on the market.

Kodak Alaris Scan Station 700 Series

A new line of network scanners from Kodak Alaris provides a central scanning solution to allow organisations to efficiently capture information from documents and route it into key business processes without the need for a dedicated PC.

Until now, many organisations have been unable to automate some paper-based business processes because a PC isn't appropriate for the work location (e.g. employees in a particular department don't require PCs). In other instances, employees may have PCs but it's preferable that they are limited to performing specific tasks. The KODAK Scan Station 700 Series is designed for either scenario. It connects directly to a network and sends data to multiple destinations simultaneously, including network drives, printers, FTP sites, email, portable USB drives and Microsoft SharePoint. It is designed to meet the needs of small businesses or branch offices of larger organizations in a variety of industries, including healthcare, finance, legal, government, travel and insurance.

"The KODAK Scan Station is helping a bank enhance customer relations by allowing tellers to quickly capture documents and access core functions of their business application on the touch screen without leaving the customer," said Tony Barbeau, General Manager of Kodak Alaris' Document Imaging division.

Unlike traditional scanners or other multifunction devices, the standalone Scan Station 700 integrates network connectivity and imaging functionality to make scanning more accessible in a shared environment. The large, easy-to-navigate touch screen offers a customisable, intuitive user experience that promises fewer user mistakes and a quicker path to proficiency. A remote administration utility allows administrators to manage, configure, and maintain multiple scanners from a single location.

In addition to the standard user interface of the Scan Station 700, the Scan Station 720 EX model extends the solution's feature set with an integration-friendly architecture. The 720 EX allows select Alaris partners to develop and install highly specialized business applications to automate information processes with even greater efficiency. Other unique features of the Scan Station 720 EX include a built-in fax modem and output to the KOFAX Front Office Server.

The Scan Station 720EX design allows third-party applications to add value to existing capture processes, offering a powerful, customizable approach to elevate end users' information management capabilities. Select partners can create these applications to easily look up projects, confirm deliveries, provide feedback and check the status of projects in the system, saving time and reducing administrative costs for the end user. The Scan Station 700 and 720EX support additional accessories for greater versatility and ease of use, including the KODAK Scan Station Keyboard and Stand Accessory, the KODAK Legal Size Flatbed Accessory and the KODAK A3 Size Flatbed Accessory.

Smartlogic tackles the Semantic Web

Smartlogic has announced the release of Semaphore 3.7, an update to its auto-classification software that improves information extraction capabilities. It also promises improved interoperability with the Semantic web.

Other specific highlights include:

- Improved functionality for SharePoint 2013 and 2010;
- Better metadata ability for the Google Search Appliance;
- Significant performance improvements in the publish process to handle extremely complex mark-up;
- Improvements in handling of large models in Ontology Manager, Ontology Server and Semantic Enhancement Server; and
- Support of Microsoft SQL Server for Semaphore Workbench.

For SharePoint 2013 and 2010, Semaphore has improved performance to support very large SharePoint farms as well as connector improvements as part of its accommodation of Office 365. Semaphore 3.7 also has a "default columns" feature, which auto-populates columns on the edit properties page. When users upload or re-save a document, they'll see the default values, which they can then save to continue or adjust as usual.

The Semaphore for SharePoint integration also has an improved user interface, added capability in the taxonomy browser tree, added diagnostic tools, and added capability to the taxonomy web part. Ontology Manager now has SKOS capability, a step that makes Semaphore's inter-operability with the semantic web even stronger. Also in the 3.7 release is better extraction from and classification of PDF documents and improved publishing of very large ontologies and their related rules.

The Semaphore for Google Search Appliance solution has improved performance and support for GSA 7.0 as well as flexibility in the configuration of the dispatcher.

Enquiries to Sam Hayward email: sam.hayward@barbador.com.

www.barbarbador.com www.optimation.co.nz

Perceptive Content 7

Lexmark's Perceptive Software has unveiled the fruits of its two-year buying spree of software companies targeting the $US7 billion global Enterprise Content Management Market, with the launch of Perceptive Evolution and Perceptive Content 7.

Perceptive Evolution is described as a catch-all solution to enterprise content management, process management, intelligent capture and enterprise search. It can be deployed on-premise or utilising public and private cloud storage, with the promised addition of a new cloud sharing solution due out in May 2014.

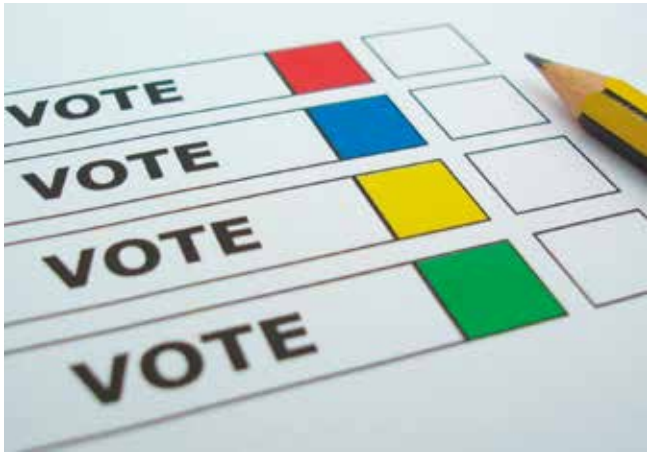
Meanwhile Perceptive Content 7 is the latest version of Perceptive's enterprise content management technology incorporating new mobile and web clients, enhanced administration, rich media management, and Perceptive Records Manager.

The introduction of a DoD 5015.2 certified records management product into Perceptive Content 7 promises to provide users a single view into the organisation's records, integrating records and information management functionality.

A cloud platform for rich media storage is designed to support the direct capture and management of video and audio files within business processes and content workflows.

"Perceptive Content 7, the next iteration of our leading enterprise content management technology, includes 80 new features and more than 1,300 new user stories," said Scott Coons, president and CEO, Perceptive Software, and vice president, Lexmark International. "With Perceptive Content 7, all types of content—from documents to the largest rich media files and healthcare clinical content—are available to customers when they need it, where they need it, from within their system of record. Content is managed throughout its lifecycle, helping ensure security and compliance."

Denying the records donkey vote



The problem of "donkey classification" in electronic document and record management systems (EDRMS) is common, where users select the first presented disposal class for a document, irrespective of its content, or always use the same class.

One reason for donkey classification is the daunting size of disposal schedules. The Administrative Functions Disposal Authority (AFDA) created by National Archives of Australia (NAA) and used by many Commonwealth departments has over 1000 classes and runs to nearly 400 pages. Finding the correct class for a document using the search facilities of Microsoft Word and Adobe Reader is difficult.

Words and phrases appearing in the vital descriptions of classes often appear elsewhere in the document, giving large, poorly ranked result sets from searches, discouraging users from attempting to find the correct disposal class for a document.

NAA sources advise that there will be no further updates of AFDA and development in future will focus on AFDA Express, a streamlined version of AFDA with only 88 classes at present. While a smaller schedule is easier to use, the problem of finding the appropriate class for document remains.

Aleka Consulting has developed the AK Disposal View product to make it easier to find the right disposal class for documents. AK Disposal View provides web-based access to AFDA and AFDA Express in structured form, so that searches can be constrained to particular attributes, such as functions, activities or class descriptions. The schedule can also be filtered by function, activity, sentence duration and sentence initiation event.

AKDV allows class descriptions to be customised by adding key words or phrases to ensure that the class appears in search results for particular search terms. This allows the specialised knowledge of experienced record-keepers to be made available to other EDRMS users in an effective and enduring fashion and improves the standard of record-keeping throughout the organization.

AK Disposal View can be evaluated at akdv.alekaconsulting.com.au using AFDA and AFDA Express. Other disposal authorities can be incorporated by arrangement.

Nuance adds Power PDF bundle

Nuance Communications has launched a new suite of tools to create, manage, share, and secure PDF files, known as Nuance Power PDF. With its Microsoft Office-style ribbon user interface, Power PDF promises to make it easier for users to transition between word processing and PDF publishing.

Features in Power PDF include:

• the ability to drag-and-drop to combine files and remove or replace pages in complex documents. For instance, in maintenance manuals or government regulation documents, users can update content without losing links to other parts of the document. For review use cases, they can utilise batch tools to automate repetitive tasks and improve efficiency throughout the workplace.

• identify differences between two versions of a document with a side-by-side comparison tool that accurately highlights changes in text and visuals, and provides a summary report of all changes.

• Nuance Dragon Notes voice recognition capabilities are integrated into Power PDF

• there is aability to create workflows to automate large-scale PDF creation or conversion, stamping, watermarking, OCR, redaction, inserting or deleting pages, and Bates numbering tasks.

Nuance Power PDF Advanced is priced from $A149.95 with volume discounts available. Power PDF Standard for individuals, home offices and small workgroups is offered from $A99.95. Visit powerpdf.com.au to download an evaluation copy of Power PDF or to view additional information.

K2 for SharePoint 2013 unveiled

Specifically built to work with SharePoint 2013, K2 for SharePoint is a new tool for building and running business applications within SharePoint -- using forms, workflow, data and reports.

• It offers the ability to:

• Create workflows that span lists and libraries in different SharePoint sites and across multiple versions of SharePoint -- on-premises or in the cloud.

• Create customized forms and workflows and integrate SharePoint data with existing line-of-business data.

• Build web and mobile apps that use SharePoint data, but run independently from your SharePoint environment.

• Build components, like forms and workflows, once and reuse them across all your applications -- in and out of SharePoint.

"It is now easy to deliver powerful workflow and forms-driven apps on SharePoint," said Adriaan van Wyk, CEO and cofounder of K2.

"Our customers now have the ability to create scalable and secure no-code apps that span on-premises, cloud and hybrid SharePoint environments, without sacrificing capability or control. It is an exciting time."

For more information visit www.k2.com/platform/integration/sharepoint-workflow.

Copy & Paste fills SharePoint gap

PortalFront Tru Apps has release an enhanced app for SharePoint called Tru Copy & Paste which works with SharePoint Online (Office 365) and on premise SharePoint 2013 installations. It enhances the usability of SharePoint by providing the users the ability to move files between folders, document libraries and sites directly within the browser similar to the traditional copy and paste feature found in Windows.

Prior to this, users had to use the 'Open in Explorer View' option to complete this which is not always supported.

PortalFront Tru Apps Director, Karim Roumani explained, "As SharePoint is becoming more mainstream and a top choice for a document collaboration solution, it is perplexing to see how such a common feature as copy and paste is not found in SharePoint. The good news is that now it is."

Tru Copy & Paste installs in seconds and adds the feature to users' SharePoint ribbon. Users can select multiple document or folders, click copy, browse to a destination location and paste those files.

Tru Copy & Paste can be installed for free from the SharePoint Office Store. More information can be found at http://truapps.portalfront.com/tru-copy-paste-for-sharepoint.html.)

NovoImage+ speeds up capture

Advanced pattern recognition and analytics technologies are behind the promised ability of NovoDynamics' NovoImage+ software to deliver foolproof document capture

NovoImage+ 1.1 handles multi-page documents, eliminating the need to re-collate files after optimising pages for efficient processing. It also includes image inversion, which automatically converts microfilm negatives into positive images to prepare them for optical character recognition (OCR).

With NovoImage+ running in the background, MFP operators don't need to be trained to use the software — no additional steps are required at the MFP control panel. And NovoImage+ Professional Edition allows organizations with distributed document entry points to purchase one software license to support all the various devices on the network. Device agnostic, NovoImage+ optimises document images from virtually any scanner, as well as MFPs, fax devices and digitized microfilm. NovoImage+ streamlines image enhancement workflow by batch processing document images from multiple devices and routing them to and from the image enhancement environment.

OBS puts SharePoint Docs in a Box

OBS has launched a new "Docs in a Box" SharePoint solution that promises to deliver 70 per cent of the functionality that all organisations need to manage their controlled documents. The company says the remaining 30 per cent of controlled document functionality consists of attributes specific to each business such as user experience, templates and organisation processes. For example security, review, approval and publication workflow.

OBS has found that most organisations either focus on tightly managing the versioning, security and control of documents or on making their existing documents easier for users to find and use, while others require all of these factors be equally important in managing their controlled documents.

The Docs in a Box solution is designed to provide businesses with a robust solution to manage controlled documents with a controlled information lifecycle, aligned to the organisation's specific business processes. It provides an information lifecycle framework for rapid tailoring of a solution to solve the most common controlled document management problems.

It delivers functionality which includes:

• create - users will have a simple way to create new documents by using a familiar Microsoft Office interface and built-in collaborative authoring and version control features

• approve - the review and approval of documents will happen prior to 'publishing' and regular review cycles, with automated notification, approvals and reminders will be set

• publish - finalised documents will be able to be published and there will be optional online approval and sign off controls

• use - controlled documents will be easy to find because search functionality will be more powerful and refined and there will be a new and intuitive browsing interface

• archive - superseded or obsolete controlled documents are actively removed from the system based on business rules or based on specific business decisions.

Esker unveils on-demand e-purchasing

Esker has launched a new on-demand E-Purchasing solution to automate the entire purchase-to-pay cycle — from purchase requisition to vendor invoice payment authorisation.

Automating accounts payable is a key focus for many of today's businesses to improve vendor invoice processing, but very few have addressed the early stages of the buying process. At the crossroads of operational, administrative and accounting functions, purchasing is strategic for companies in terms of cash management and internal performance.

The purchasing department can generate added value and profitability for the entire organisation; however, the value is often restricted by outdated and inefficient processes involving paper documents and time-consuming manual tasks. E-purchasing allows companies to streamline spend management, reduce carrying costs and increase profit.

"With this new cloud e-purchasing solution, Esker offers a procurement solution to any company – especially in the mid-market space – which has not standardised or digitalised its procurement processes so far. This is great news for Australian and New Zealand mid-size companies which will soon be able to derive the same business benefits as larger companies running SAP or Oracle," said Christophe DuMonet, Managing Director Esker ANZ.

Esker allows different departments and users within a company (e.g., purchasing, accounting, marketing, etc.) to manage indirect purchasing that generally takes place outside of the ERP system. Any business, regardless of order volume or number of employees, is able to automate its entire purchasing cycle in a relatively short period of time. Pricing for the E-Purchasing solution is subscription and transaction-based for an unlimited number of users. The solution will be offered worldwide in April 2014, and will be made available at a later date for use on mobile devices, such as tablets and smartphones, to meet the needs of employees who are off-site or on the go.

MFDs with a Smartphone attitude

KYOCERA Document Solutions has unveiled new TASKalfa multifunction devices (MFDs) featuring multi-touch colour display control panels incorporating 'pinch and zoom' and swipe technology – similar to the technologies found in tablets and smartphones. The new line-up includes a range of A3 colour and black and white models offering a range of output speeds and scanning capabilities.

The new TASKalfa range is fitted with KYOCERA's Hybrid Platform for Advanced Solutions (HyPAS) technology as a standard. HyPAS allows users to utilise KYOCERA and third party software solutions as well as commanding control over customisation.

An OCR scan option is standard on high speed colour, and black and white MFDs. Two new A3 black and white high-speed MFDs – the TASKalfa 6501i and 8001i – offer dual scan speeds of 180 images per minute and up to 8 different media trays with a total capacity of 7,650 sheets. These machines can support custom paper, banner printing and provide optional tri-folding.

Interact 2.0 searches Dynamics AX

Lexmark's Perceptive Software has release the Interact 2.0 search tool for users of Microsoft Dynamics AX, allowing users to locate relevant content based on a customer-defined folder hierarchy, within any AX list page or details screen.

Interact 2.0 offers a configurable deployment to any form in Microsoft Dynamics AX, including configuration-driven context for access privileges, capture and viewing. Metadata mapping, access and capture are configurable.

End users are able to capture files in as few as two clicks through multiple options, populating metadata from AX automatically and submitting directly to Perceptive content management or version control. Complementing Microsoft Dynamics AX with separate systems has been a traditional approach for bridging gaps in unstructured content retrieval, though requiring users to switch between multiple systems is time-consuming and often results in errors. By embedding within the native AX system, Interact 2.0 eliminates this liability.In addition to delivering enterprise process and content management capabilities that keep Microsoft Dynamics AX users productive in that application, Perceptive Software also enables users in CRM, email and mobile environments to access critical content through a common repository.

Book scanner handles up to A2+

Germany's Zeutschel has launched the OS 12002 Advanced Plus book scanner, suitable for both mass digitisation and scan-on-demand applications as well being able to efficiently digitise larger collections of files.

Target groups are libraries, archives and scanning service providers. The colour book scanner processes formats up to A2+ and features the newly developed Advanced Plus book cradle, which automates key digitisation processes, thereby significantly increasing productivity. It will be available from the 2nd quarter of 2014.

"The Zeutschel OS 12002 Advanced Plus raises workflow automation in book scanner use to a new level. Consequently, it is an interesting alternative to robotic book scanners for many applications in mass digitisation and is also much more cost-effective", says Jörg Vogler, Managing Director of Zeutschel GmbH.

Compared to the previous OS 12000 model, the new Zeutschel book scanner has a higher picture resolution of 400 ppi as well as a Gig E-interface for fast data transmission. It displays a high degree of flexibility in processing documents. Maximum book thickness under glass is 150 mm and 200 mm without glass.

The OS 12002 Advanced Plus boasts more scans per day with optimal ergonomics. This is achieved by dint of the scanner table and motor-driven book cradle, enabling an automatic operating mode and gentle treatment of the original documents.

The Advanced Plus book cradle also comes equipped with a self-opening glass plate, the book plate lowers automatically and contact pressure can also be electronically set to any of the five levels.

The scanner table is also user-friendly with plenty of leg room and areas to the left and right of the table which can be used to store books and also provide extra space for documents which are larger than the scan area.

In addition to the premium-quality camera, the new Zeutschel book scanner also features the next generation in LED lighting systems. As a result, there are a number of advantages for the user and the environment.

Thanks to the better spread of light and the light intensity, documents are illuminated better which has a positive impact on quality, particularly in cases of colour-fast scans. Since LED lights do not require the usual warm-up phase, the scanner is ready to use sooner. LEDs are highly efficient, leading to lower energy consumption and they also have a long operating life.

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TIS launches MobiREMIT

A new mobile application for automated remittance processing and payment via mobile device called MobiREMIT leverages the Top Image Systems' mobile imaging platform. Remittance processing companies today can only begin to process payment requests upon receipt of physical remittance documents at a processing centre. MobiREMIT shortens this processing cycle and makes funds available faster.

The first step is mobile capture of both payments and remittance advices in one digital envelope, which reaches the processing centre in real time; then the cheque image can be transferred for immediate deposit. Automatic recognition and processing of semi-structured remittance advices reduces the time, investment, and errors associated with manual data entry of such paper forms. MobiREMIT adds to the Top Image Systems' mobile imaging solution portfolio, along with MobiCHECK, MobiPAY, MobiFLOW and a growing list of mobile applications that leverage mobile devices to optimise various use cases involving image processing.

OpenText SharePoint Services for SAP

OpenText has launched a new platform to enable the integration of content stored on SharePoint with content managed by OpenText Extended ECM for SAP Solutions.

OpenText Microsoft SharePoint Services (SPS) allows SharePoint users to work with content managed by OpenText Extended ECM for SAP Solutions, adding native SharePoint content to OpenText Extended ECM for SAP Solutions. The solution combines secure, automated capture, storage and organisation of documents with archiving, records management and imaging functionality. OpenText says because the solution provides a full view into systems, companies can eliminate the need for separate solutions for compliance reporting, archiving or records management.

TITUS SharePoint Security Suite

The TITUS Security Suite for Microsoft SharePoint has been enhanced with mobile access security capabilities. TITUS Security Suite automates functions like managing permissions, limiting mobile access, and applying security labels to documents.

This promotes strong, consistent data governance over information stored in SharePoint. TITUS leverages existing document metadata and trusted user claims to ensure that security is applied automatically and consistently across all corporate documents stored in SharePoint. Because mobile devices are easily lost, stolen or hacked, many organisations deny their users mobile access to SharePoint. In this release of TITUS Security Suite for SharePoint, administrators have the ability to configure secure policies, restricting specific information in SharePoint from being accessed by a mobile device. Without the need for a custom app, TITUS Security Suite for SharePoint can automatically enforce device-specific access permissions, making sensitive documents—that are otherwise available to users on the desktop—invisible and inaccessible from a mobile device.

TITUS Metadata Security for SharePoint uses document metadata and trusted attributes (claims) to ensure the right people access the right information from mobile devices and the desktop. TITUS Document Policy Manager automatically converts documents to Adobe PDF and applies visual labels to raise awareness of sensitive content.

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