Capital expenditure:
DM/ECM helps reduce office costs

Legal challenge:
Achieving ‘diligent documents’

Technology:
Scanning to the cloud

Strategy:
Multi-channel capture

Analysis:
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Literally as we go to print with this issue, Lexmark has announced it is to acquire Kofax, adding to a long list of buys in recent years that includes major players such as Perceptive and ReadSoft. But this latest acquisition seems to dwarf even those in its significance. Kofax products have for a very long time been seen as the de facto standard for a huge number of capture users, so Lexmark will inherit a massive install base on day one, along with a team of technical experts with an unrivalled breadth of knowledge of the sector.

Let’s not forget that Kofax themselves were for a long time voraciously acquisitive. They’ve barely had time to complete the integration of Kapow into their portfolio before being faced with the reverse challenge of being themselves ‘assimilated’ into the Lexmark business. It will be interesting to see how this move affects Lexmark’s positioning in the market - we can probably assume a shift toward process automation and a more solution-focused proposition, but what else might change?

Coincidently, this issue features an article on multi-channel capture, which foreshadows some of the trends that this acquisition could herald. ABBYY’s Markus Fichler touches on how the ‘changing world of work’ is impacting capture strategies: “To integrate multiple locations and mobile workers into the business process, capture and processing increasingly lends itself to the cloud. This enables companies - and their workforces - to gain flexibility. But that’s not the only benefit. Web-based technologies such as the cloud and web capture offer the highest safety standards that many organisations require during data transmission.”

Forrester have long been predicting that capture will increasingly have to incorporate advanced analytics, mobile solutions, BPM and case management, as well as stronger integration with enterprise production platforms. There is no doubt that such thoughts are uppermost in the minds of the executives of the newly-merged Lexmark and Kofax business. Elsewhere, the impact of the cloud on the ECM sector comes up again in an opinion piece from Silver Peak’s Everett Dolgner, who argues that investing in cloud storage needs careful planning: “Technical requirements need to be carefully considered as data that is stranded in the cloud is useless. If business critical data is going to be protected in the cloud, there needs to be a way to restore the data into a VM, or onto a physical server, for rapid recovery. If the data must be downloaded first, the solution should not be used for anything critical.”
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Lexmark to Acquire Kofax for $1 billion

Lexmark and Kofax have entered into a merger agreement in which Lexmark will acquire Kofax for $11.00 per share in cash, for a total enterprise value of approximately $1 billion. Kofax’s Board of Directors has unanimously recommended in favor of the merger agreement. Kofax shareholders, holding approximately 25 percent of the outstanding shares of Kofax, have signed a voting agreement committing to support the merger.

Upon successful completion of the acquisition, Lexmark will nearly double the size of its enterprise software business to an approximately $700 million business competing in the expanding $10 billion market.

The acquisition of Kofax enhances our best-in-class offerings so our customers can capture, manage, access, and act upon their information more efficiently, and extends Lexmark into the high-growth smart process applications market, said Paul Rooke, Lexmark chairman and chief executive officer.

Are we missing a return on information?

A new study from Iron Mountain has found that a lack of understanding between those who manage and those who use information is making it harder for organisations to gain the most benefit from it.

The study found that 89 per cent of UK business leaders don’t fully understand what their information managers actually do. In return, 56 per cent of UK records and information managers admit they don’t know exactly what senior business leaders want and need from information - with 66 per cent confused about the information needs of colleagues in marketing, manufacturing, finance and other departments.

The study shows just one in ten (10 per cent) of the business leaders surveyed had complete confidence in their organisation’s ability to extract the full value from its information. These trends and their impact are echoed elsewhere, with one global study finding that just 27 per cent of firms say their employees have access to the data they need, and 42 per cent admit that access to their data is cumbersome.

“In today’s knowledge-driven world our study has revealed an unexpected obstacle on the road towards return on information,” said Sue Trombly, Director of Professional Services at Iron Mountain. “This must be addressed as a matter of urgency if organisations are to have any chance of extracting the full value from their data. The good news is that the study also found that 88 per cent of records and information managers have confidence in their ability to help businesses maximise the value of their information.”

Mitie picks ibml scanners for new Digihub

The Total Document Management Division (TDM) of FTSE-listed Mitie Group Plc has installed a number of ibml ImageTrac scanners supplied by Spigraph for its new Digihub document services centre, recently opened in Birmingham.

Mitie’s new 10,000 square foot service centre will host TDM’s UK document capture capability that had previously been located in their London facility. Two ibml ImageTrac scanners, supported by three desktop scanners, will replace eight scanners previously used in the London centre. The ibml ImageTrac scanners, powered by ibml’s SoftTrac Capture Suite software, provide a secure, flexible and robust infrastructure which will allow Mitie TDM to meet its growing customer demand from the UK market.

“Based on the results of a competitive tender we chose Spigraph Group as scanner supplier for our new centre because of their commercial and service flexibility and their ability to meet our delivery requirements for opening the new Birmingham operation” said Kulvinder Reyatt, Managing Director, Offsite Services, Total Document Management.

“The new ibml ImageTrac scanners, which can plug directly in to our existing document management software platform, will allow our capture operation to keep pace with our rapidly expanding workload. We also plan to work in partnership with Spigraph to identify further growth opportunities in the local Midland economy as well as across the rest of the UK.”

“Spigraph Group is pleased to partner with Mitie in providing leading technology solutions and industry expertise for their new Digihub document services centre,” said Wayne Davey, CEO Spigraph Group. “The recent Spigraph merger with Dicom enabled us to quickly bring our team of industry professionals with deep expertise in production scanning environments together with Mitie to deliver a robust and future-ready solution built on ibml ImageTrac scanners.

“With 20+ years’ experience across EMEA in the document solutions industry, Spigraph is well positioned to support Mitie’s growth plans and to help them provide world class document processing services to their clients.”

www.spigraph.com
Storetec selected for ESPO framework

Storetec have been selected to provide Document Management services to the Eastern Shires Purchasing Organisation (ESPO). The new framework offers Document Scanning and Document Storage and is available to all Public Sector organisations across the UK. ESPO is one of the largest Public Sector buying organisations in the UK. Established in 1981 to provide comprehensive procurement services to the public sector, ESPO has the purchasing power to achieve savings to pass on to its customers. ESPO’s annual procurement activities are more than £1 Billion.

David Wilkinson, Sales Director of Storetec, said, “We are proud and delighted that ESPO has chosen to engage Storetec for this prestigious framework agreement. … We know that the NHS has a paperless directive from Health Secretary, Jeremy Hunt, and that the wider Public Sector is under huge pressure to reduce costs and increase efficiencies. The concept of ‘do more with less’ only works if service partners to the Public Sector are innovative and add real value. I believe that Storetec does, which is why our ESPO framework status is important.”

The framework agreement commenced on the 7th February 2015 and will run until the end of December 2016. It covers a number of areas from mainstream Document Scanning to Large Format Scanning, Microfilm Scanning, Microfiche Scanning, Photograph Scanning and Document Storage services.

www.storetec.net

Scan (almost) anything in the office!

Xerox has released its new Xerox DocuMate 5540 document scanner that combines both a flatbed and sheetfed scanner in one unit, along with a 70-page automatic document feeder (ADF). The 5540 scans 40 double-sided pages in less than a minute and has a legal-size flatbed for scanning bound notebooks, thin or damaged documents and transparencies.

‘The DocuMate 5540 is now our premier mid-level ADF/flatbed combination model positioned directly between the DocuMate 4830 and DocuMate 3220 in both pricing and specifications,’ said Jon Harju, chief technology officer at Visioneer, a Xerox licensing partner. ‘It offers a truly versatile and robust option for those customers requiring a straight paper path, legal size flatbed, low maintenance and excellent paper handling.’

www.xeroxscanners.com

KGS opts for Kodak Alaris scanner estate

KGS Associates, a long-established and respected document management bureau with facilities in the UK and the Czech Republic, is changing its whole scanner estate and standardising on mid and high volume production scanners from Kodak Alaris. KODAK i4600 Plus and i5000 Series Scanners will be deployed throughout the business. KGS offers a full range of digital archiving and BPO services currently processing about 3 million images per month for a range of clients in the NHS, local and central government and various police forces around the UK.

The switch from its existing scanner supplier is for various reasons. KODAK production scanners do not slow down when operating at 300 dpi in colour. This maximises operator productivity and ensures customer service level agreements are met. The i4600 Plus scanners process 120 pages per minute (ppm) with the i5000 series rated at up to 170 ppm in dual stream with all image processing features switched on.

Glen Moffat, KGS’ production director said, “Since the days of microfilm, the quality of Kodak Alaris’ service offering hasn’t changed. They’ve always had friendly and knowledgeable engineers. This means that the majority of problems are fixed straight away with parts arriving next day if they aren’t. It’s completely polar to our experience with our other vendor where we just had too much down time as service was contracted out to third party engineers who weren’t scanner specialists.’

Day-to-day scanner consumable costs are also much cheaper, which reduces running costs. Moffat explains, “Even though we were initially buying hardware at a low price, every three years, we were spending £12,000 just on rubber rollers to maintain the scanner fleet. Contrast that with Kodak Alaris where the like for like bill is about £250. It’s a staggering difference with the money saved going straight to our bottom line.”

Remote printing gains for Offshore Group

Standard Bank have deployed UniPrint Infinity software across their Offshore Group within their Jersey, Isle of Man, London, Mauritius and Johannesburg offices. The Group services corporate, business, international personal and private banking clients with investments, fiduciary and banking solutions delivered from 420 internal advisors across the globe. The Group selected UniPrint to address the excessive bandwidth consumption across vast distances that was hampering speedy and reliable transmission of print data for remote printing.

Deployment of the UniPrint UPD has assisted the Group in eliminating the individual printer maintenance overhead involved in looking after multiple manufacturer printer drivers on the application servers, allowing centralised control, while users can access different printers.

www.uniprint.net
IRIS has a snappy tutorial video that it uses to introduce version 15 of its flagship Readiris software, which features the strapline: 'No retyping. No paper. Just smart documents.' And in a nutshell that summarises the product very well indeed. The fact that the same tutorial video runs for just 45 seconds gives some indication of how straightforward the proposition is. Scan/recognition software has been getting faster, more accurate and just generally better for many years now, to the point where for many users it is almost a given that it will work.

But where the technology has arguably lagged behind the 'consumer IT curve' is in user-friendliness and intuitive design and workflows. Most scanning software still feels like it has been designed by - and for - people who are already broadly au fait with what are actually some fairly complex concepts. Simplification of the whole thinking behind DM systems is long overdue.

Readiris 15 is different. It is perhaps the first piece of software that really reflects the shift towards simpler scanning processes that has been visible for some time in scanning hardware. As scanners have moved inexorably toward a 'one button' interface, software has been slow to keep up. But Readiris is genuinely very straightforward to install and use. The ribbon menu includes just a few basic options, logically laid out in sequence: 'Acquire' is where you tell it to find your documents (i.e. scan or import images from file), 'Languages' gives you the option to specify which language the text will be in (and in the Corporate Edition allows users to set secondary languages within one document), 'Output' tells the system what format your scanned data should be converted into (including all the usual Office options, as well as PDF, HTML, XML and even EPUB), and 'Target' tells it where to send the file. Once these basic options are selected, it is simply a matter of clicking on the big green 'Start' button.

Batch mode allows for high speed batch document conversion, and can process large multi-page documents comfortably and without slowing down processing, even with the relatively modest processor power of our test PCs. Another useful Corporate feature is the Watch Folder system by which the software will monitor specific folders on a local drive, network or FTP server and automatically process any documents appearing there.

Readiris Corporate 15 is ideally placed as a tool for SMEs with a mixed fleet of MFPs and scanners, where the need is for one simple front-end tool that will give identical and efficient performance no matter what devices it is connecting to. Its simple and intuitive interface removes much of the 'techno-speak' of which the DM industry seems to be so proud and protective, and replaces it with language that makes sense to a business user.

More info: www.irislink.com

VERDICT

Readiris is at once IRIS' simplest and also its most comprehensive piece of software, and the Corporate version has enough additional business bells and whistles to make it an obvious choice for users who need a robust but straightforward and intuitive solution.
Considering the amount of documents you work with every day, we know scanning can get in the way of your work. That’s why Xerox offers a wide range of scanning solutions equipped with all the industry-leading tools you need to make scanning easier and faster. So you can keep moving—no matter how many documents stand in your way.

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xeroxscanners.com

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NHS Wales Shared Services Partnership is processing 30 million-plus pages a year on ibml scanners

**COMPELLING BUSINESS CASE**

The Cardiff-based Primary Care Services scanning centre is using ImageTrac high-volume intelligent scanners and SoftTrac DocNetics software to capture 20,000 Welsh prescriptions per hour. The business case for transitioning to automated prescription processing was compelling. The sheer throughput capability of high-volume scanning has enabled PCS to process significantly more prescriptions in a shorter timescale at lower cost.

Sophisticated workflows have facilitated business processes as well as improving the audit trail, and prescription images can be shared with external medicine management services in an instant. The requirement to store paper-based prescriptions has also reduced from thirteen to five months. In summary, high-volume scanning has yielded vast cost and time savings, quality improvements and process efficiencies.

Neil Jenkins, Head of Modernisation & Technical Services for PCS, looked to increase the intelligence and depth of data capture by reading 2D barcodes. The ImageTrac has enabled this, reading the barcodes on the fly during scanning and providing significant additional operational efficiency.

Originally, Primary Care Services considered whether to run a desktop solution, but very quickly decided that...
the increase in operator and maintenance overhead would be counter-productive.

On average, prescription volumes in Wales increase by 5% per annum, so the organisation had seen a significant increase in processing volumes over recent years. High-volume scanning platforms are well equipped to handle this rate of throughput increase with little or no increase in overheads. PCS decided there were benefits to investing in this high-volume scanning architecture.

Jenkins’ team had reviewed the offerings of several leading providers of high-volume scanning solutions. After completing its pre-qualification process the team invited just three suppliers to tender, followed by benchmark testing and scoring exercises. The results of these tests were combined with evaluations relating to other criteria, including the requirement for successful candidates to demonstrate financial stability and a proven track record in high volume scanning environments.

Primary Care Services awarded the system refresh contract to Kodak Alaris, which sells and maintains ibml’s high volume intelligent scanning solutions throughout Europe, Africa and the Middle East.

According to Jenkins: “In our benchmarking tests the ibml ImageTrac was more accurate in providing key recognition results than the solutions proposed by other short-listed candidates. We were happy with the price-performance quoted by Kodak Alaris/ibml and their solution also provided an easy transition that was more rapid and safe than any option presented by alternative suppliers.”

**A SMOOTH TRANSITION**

“Installation couldn’t have been simpler. We deployed the new ibml units one at a time over a two week period to ensure a smooth transition. The units were up and running immediately, requiring only a few small configuration tweaks to meet our specific requirements,” said Jenkins. “We found Kodak Alaris and ibml to be responsive and easy to deal with every step of the way, although we have had little need to call upon their support services since installation and set-up phase.”

**LEVERAGING THE INVESTMENT**

Since the initial deployment, NHS Wales has leveraged its investment by automating and increasing the efficiency of other mission critical functions. Spare capacity has been utilised to scan other documents, including the scanning of Invoices and Staff Records handling.

Neil Jenkins concludes: “I believe we have leveraged our investment in ImageTrac, bringing wide-ranging benefits to NHS Wales as a whole, at minimal additional expense. Kodak Alaris and ibml have enabled Primary Care Services to hit all of its processing targets more efficiently and cost effectively than before.”

More info: www.ibml.com
With the growing rise in on-line business and e-commerce, organisations need a simple, cost effective way to capture and track transactions through the various processes, to successful conclusion. Online electronic forms solutions provide the ability to design, capture and workflow intelligent business forms which are completely compatible with any application and any industry. Best of all, such forms are very easy to setup and use - the user simply fills out drop down lists, check-boxes, radio buttons, and text fields that can be validated in real time. As the users fill the forms, data is collected behind the scenes and on completion, is used to generate an actual form in a read-only format, together with the full data set which can be used to automate back-end business processes.

But eForms should not be seen in isolation from a planned information strategy. An eForms Framework helps to define a business strategy - simply deploying an eForm will not deliver that strategy. Such a strategy should include the following key components:

- Requirements Analyses - data should be keyed in once
- Development - use software designed to build electronic forms
- Deployment - via business intranets or Internet (or both)
- End User Experience - end-to-end form filling with a point and click interface
- Output Management - automate and drive the business process
- Reporting - how the forms are being used, and metrics on the business processes
- Support - training to build good quality forms that enhance the end user experience

Integrated eForms are essentially structured data entry screens used for collecting data which can be used to feed any number of front and back-end systems used in business processes, for example, HR and ERP applications, reporting tools, letter generation, etc. But these forms must not be seen as simply tools for data collection -
this is just the start!

The essential functionality must include:
- Ability to use a form that interactively changes according to the needs of each individual user's session. The user simply fills out drop down lists, and depending on one answer, different choices are given for the next questions - intelligent navigation. The user must be allowed to suspend the form filling and resume at a later time.
- The forms link to supporting documents of all types
- System administrators have the ability to change the way the form presents itself
- The form design must not involve programming although it is understood that more complex forms will require some IT input - users who understands the business process are ideally placed to design forms.
- The eForms system is independent of any back-end business system, although it can be integrated; consequently, it can be used to collect data for any back-end system, including centralised information repository systems.
- Upon completion, the form is automatically saved and integrated into a back-end repository, which allows users to access and search for the form based on data populated in the form, directly from the information repository. Receipt of the completed forms may trigger back end workflow applications.
- eForms must be detached from any front-end application, to avoid counting eForm users as concurrent users, eliminating any licensing implications. The system must support un-limited access by internal and external users.

**EXAMPLE 1: EXPENSES MANAGED**

A London based publishing company recognised the benefits of using electronic forms to manage company-wide employee expense claims online. Operating a paper-based system was inefficient, slow and costly as paperwork had to be couriered between buildings or sent in the internal post which often resulted in delays or lost forms. With a paper system, staff would receive monthly credit card statements and have to manually enter all items and attached receipts - a laborious process for some who had 60 to 70 purchases to input per month.

The business wanted to resolve these issues by introducing an online claims solution to save time and improve processing quicker. The project goals were:
- Improve the efficiency of the whole process;
- Make claims quicker for staff, particularly sales people so they could focus on selling;
- Provide a direct feed into the accounting system to avoid manual input;
- Provide more accurate recording of expenditure by staff - first time - without AP staff involvement.

The organisation deployed the CCube eForms solution to automate the whole process. The new system means that Accounts Payable staff are saving 10 days a month to process 250 credit card and cash expense claims - time which is being far better used to run the business. The system delivers 100% correct nominal code costing, improves reporting and has improved organisational effectiveness.

**EXAMPLE 2: INTELLIGENT FORMS**

Thousands of staff across hundreds of NHS Trusts use paper based forms for recording patient data. A key issue is the number of times the same data is manually recorded, for a single patient who moves from one treatment centre to another. This, coupled with the delay of documents being sent back and forth via surface mail, creates an intolerable situation for all those involved in treating patients.

The requirement is simple: a form that is intelligent and captures the required data once, for reuse at any point along a patient's care pathway. Intelligent eForms present relevant questions based on responses to earlier questions. The system helps the user in the form filling process and verifies the data keyed in which is saved for reuse at any point. This data can also be used to automatically pre-fill related forms so that the same data is not re-keyed. A number of eForms in the NHS have been designed to make the process far more efficient, minimise data errors, and move relevant data as the patient moves through the care pathway. These electronic forms also present the data instantly to care-providers who can make rapid decisions, with significant reduction in wait times for patients.

**EXAMPLE 3: CRIME-SOLVING FORMS**

The Metropolitan Police handles thousands of applications for communications data per year, which are the subject of serious crime enquiries covering a wide range of offences from robbery and burglary to kidnap and murder. Through their implementation of "TIMS" - electronic document management, telecommunications, electronic forms and workflow - the Met has dramatically decreased the time needed to respond to crimes, whilst operating in a paper-free environment and ensuring legal compliance.

Central to TIMS is the electronic, on-line form, accessible by any one of 30,000 police officers. TIMS manages the interaction between these "customers" and the processing centre - the "business". In addition, TIMS manages interactions between customers and their respective supervisors, ensuring that the business is aware of all aspects of an application from initiation through dissemination of results, and can provide rapid response to enquiries at all stages of the process.

New and imaginative uses of eForms are in development and at various stages of user acceptance. These developments are tightly coupled with major advances in the interaction between users and computing devices, specifically hand-held, mobile devices driven by consumerism. Mobile hand-held devices such as smartphones and tablets are leading an information revolution in which eForms constitute a core technology.

More info: [www.ccubesolutions.com](http://www.ccubesolutions.com)
CASE STUDY: LIVERPOOL WOMEN’S HOSPITAL

A smoother delivery

Liverpool Women’s Hospital is improving care delivery by digitising its Medical Records

Liverpool Women’s Hospital (LWH) is the largest of its kind in Europe with 8,500 births per year, and is well known for Maternity and Neonatal services, in addition to Gynaecology operations and Reproductive medicine. Research plays a key part in ensuring continual development of services that directly benefit patients. It’s a 24-hour operation involving the work of a dedicated 1,410-strong team, made up of clinicians and support staff.

In 2014, Liverpool Women’s Hospital went live with a new Electronic Document Management System (EDMS) utilising the innovative Unity solution from Fortrus, and Documentum from EMC. The EDMS is used to create a fully electronic version of a patient’s records by replacing the paper version with a scanned digital image of the original document, which can be accessed from anywhere across the hospital network at any time. These records can only be viewed by authorised Trust staff who have been given the rights to view the records as part of a patient’s care delivery.

MEETING THE STANDARD

The Trust needed a solution to manage their medical records and to conform to the Government standards for medical records as set by the 2015 targets, the IDCR (Integrated Digital Care Record). This government initiative, applying to all NHS Trusts, means that the trust needed a vision to assist them to not only reach, but exceed the requirements laid out within it.

David Walliker, Chief Information Officer at Liverpool Women’s Hospital commented on the project: ‘The driving force for LWH was not only to reduce the daily costs associated with managing our medical records, whilst ensuring compliance with regulatory guidelines, but also to enable the ability to view a record at any place or point removing the reliance on a single copy, as happens with paper. This formed part of the ‘Doing IT RIGHT’ strategy (Record Management, Intelligent Working, Greener, Holistic, Technology Led), which the Unity solution provided by Fortrus has enabled the Trust to achieve. The key criteria for the selection of the Unity solution was the acceptance it gained, based upon overall user experience, from the 53 clinicians that participated in the project.”

The Trust will use the Unity solution in order to display the patient record within a new Clinical Portal. This will replace the traditional patient record in that it will display not only the paper record in an electronic display, but also any other information held about patient care on other specialist systems, such as x-rays, ultra-sound and blood results, so that staff delivering care have a single view of all the information about that patient - sometimes called an Electronic Patient Record.

The solution allows all doctors, nurses and other health professionals a single view of that record, instead of having to scan through paper case notes and electronic systems to gather all the information about the care received.

The Medical Records library staff are gaining immediate efficiency savings in tracking, pulling, re-filing, preparing, auditing and locating health records. The automation of this file tracking process will also release clinician-side staff from this administrative chore and thereby make more patient-facing time available.

The clinical user interface for the solution is provided by Fortrus; a desktop and mobile solution will be implemented using Unity on the Trust workstations and iPad devices. By using the Unity search tools, a clinician can quickly view data by attendance, document type, date or specialty for example; this allows clinicians to find information far more efficiently and effectively, ensuring minimal distraction from their daily routine.

More info: www.fortrus.com
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TECHNOLOGY: SCANNING TO THE CLOUD

A Touch of class

Visioneer CONNECT has made it easier to get paper documents into the cloud than to move electronic "born digital" files there, says Martin Pain, EMEA Sales Manager at Xerox Scanners / Visioneer

Visioneer CONNECT links enable users to scan and automatically upload earth-bound documents to popular cloud repositories, in your file format of choice including text-searchable PDF, with the press of one button. Even your cloud credentials (username & password) and destination folder can be preset through Visioneer OneTouch so future scan jobs are not interrupted with log-in details. Most cloud destinations even allow users to choose the folder of their choice and even specify an email address so that a notification email is automatically sent with a link to their file. By scanning images directly to the cloud, users can easily collaborate and share files while working in multiple locations.

The following OneTouch cloud links are certified and available for downloading now: Google Drive, Evernote, Box.com and Dropbox. Best of all, these links are free to our customers, another way to help them stay connected with the latest document cloud technologies.

Visioneer CONNECT is the latest link development for the award-winning Visioneer OneTouch scanning utility which was originally developed back 1998 when Visioneer changed the way people used scanners by reducing the many steps required to scan a document to just one touch of a button. But that was just the beginning.

We have been trying to get to a paperless office for years and a document scanner is the obvious component to get us there, but let's face it, most scanners are not as intuitive as they should be and certainly would not be considered elegant. Software and drivers that come with most scanners are not easy to use and can be downright intimidating. There are seemingly endless choices of configurations, settings, and file formats from which to choose. As a result, scanning paper becomes complicated and eventually, avoided.

Once the user gets through all this, they are usually left with an electronic document on their PC, but little insight or help on how to use the file with other applications such as email and word processing, or devices, such as their printer or storage locations such as local HD or the cloud.

THE RIGHT BALANCE

In traditional scanning there are two industry-standard drivers, TWAIN and ISIS, for initiating scanning from within document capture applications that have a SCAN button or function. These drivers are very robust and most scanner manufacturers include them with their scanners. Typically when scanning with a driver the user must install and then initiate all scanning from an often complicated software application. These applications can sometime offer a host of features making usage overly complicated or at other times they may be overly simplistic and offer little to no options for working with scanned documents.
In 1998 Visioneer changed the way people operated scanners when we created the Visioneer OneTouch scanning solution. From its conception, OneTouch changed the way people scanned by reducing multiple steps in the scan process to one touch of a button. They combined an easy to use, feature rich scanning application with all the functionality of our advanced TWAIN drivers. They then coupled this software solution with a fully integrated front panel that allowed the user to perform different scanning tasks. In fact one of the first OneTouch advertisements lists the actual steps saved using a Visioneer OneTouch scanner to email a photo, reduced from thirteen to just one. Back then, ‘13 to 1’ was a matter of scanners with buttons vs. scanners without buttons, but great ideas are quickly copied. And with other companies today making similar claims of their SCAN buttons, the message which once set Visioneer apart from the competition, now makes them look the same.

**FLEXIBLE APPROACH**

The true value of OneTouch lies not only in its ease-of-use but in the amount of flexibility it offers. While most bundled solutions allow scanning to a folder or email, OneTouch gives you near limitless options for routing, configuring and naming your scanned documents. If a program or process supports working with image files then the chances are OneTouch will recognise it and allow you to select it as a destination. Furthermore, Visioneer offers tools for developers to build in support for any application as a destination making OneTouch truly a universal solution.

Beyond routing your documents, it is important that any elegant solution also not remove features or functions that might be available on a more complicated scanning solution. Fortunately, with OneTouch you can modify or adjust any setting or feature available on whichever Visioneer or DocuMate scanner you use. With options to expose all the advanced features of the DriverPLUS TWAIN drivers you can rest assured that regardless of how simple or advanced you scanning workflow needs, OneTouch provides the flexibility to get the job done. Competitive scanners simply have no means to do this. Only Visioneer OneTouch technology gets the job done in one touch.

OneTouch also ensures that communication with your scanner is always enabled. It is constantly polling the hardware, thus allowing for on-demand ‘push scanning’. With traditional drivers you have to first launch the scanning software and then select the scan command to open the driver before enabling push scanning.

**HOW DOES ONETOUCH WORK?**

First you select the destination to which you want your scanned images to arrive, for example, you may want your first configuration to create a Word document, a second configuration to save your images to a folder on your hard drive, and a third to scan to email, etc. You then select the file format for the scanned document and configuration (paper size, colour depth, resolution, duplex, auto crop, etc.). All these settings are pre-set to the most popular scanning tasks, but you can customise them to your own particular needs. Once saved, users can easily scan to various destinations by simply pressing a single button.

**SIMPLIFYING COMMUNICATION WITH LINKS**

Visioneer OneTouch directly links Visioneer and Xerox scanners with industry-leading software, forming an easy to use conduit from paper to a selected destination. Every time the user scans a document, they no longer have to configure their scan job, launch their scanning software, or the application the scanned image will be ‘linked’ to. The document to be scanned is simply placed in the feeder tray and one of the buttons on the scanner front panel is pressed. The scanner automatically and without further human intervention launches the desired application, scans and delivers the digital document to that application.

More info: connect.visioneer.com
The insight advantage

Wilmington Insight delivers more for its charity clients as weekly high-volume data capture processes reduce from 5 to 1.5 days

When your core business is information, the way that this content is collected, stored, managed and accessed is paramount to the quality, responsiveness and cost of service provided to clients. At Wilmington, the global network that turns knowledge into advantage, intelligent digital management of content is a strategic priority.

Wilmington plc (www.wilmingtonplc.com) is a network of companies that deliver the knowledge, expertise and tools to give businesses competitive edge in the digital age.

Founded in 1995, the dynamic and expanding network provides particular specialisation in Finance, Legal, Risk & Compliance and Insight. Over the last decade, Wilmington Insight has worked with EASY Software to implement highly efficient and intelligent digital content management solutions. The relationship began in 2005, with a move to improve back-office efficiency at a group level, through the scanning and storage of financial documentation relating to purchases, and integration with internal resource planning systems.

BOOSTING CHARITY WORK
More recently, Wilmington Insight has applied digital automation to the way it handles high volumes of documents for a specialist data service aimed at charities. The service receives documents from external third parties - in volumes of around 5,000 each week - and extracts and processes key information from them which it sells on to its charity clients in database form.

Before automating the data extraction, staff in London would have to leaf through pages and pages of documents to find the particular data they needed, then send the files to another office to be written into the database by teams of copy typists. The quality and format of the incoming documents varied greatly, adding to the time it took to identify the data needed for extraction.

“We had to collate both contact and financial data manually, and there was a lot of to-ing and fro-ing,” says Polly Avgherinos, managing director of Wilmington Business Intelligence. “To type up one set of information took one person a whole week.” This was a laborious, mundane exercise given the high volumes of content involved, a continuously refreshing workload that must be kept on top of. The job couldn’t be rushed either: charities pay to have access to the data which they use in vital income generation work – so the accuracy of the data is critical.

In addition to improving efficiency and data reliability, Wilmington Insight also had competitive reasons for improvement. “Although no one else offers the service that we do, the market is demanding more information from the source material we handle,” Polly notes. “As long as we were restricted to manual processes, we couldn’t hope to meet these additional needs without employing more people. But charities have finite resources, and couldn’t have tolerated the higher prices we would have had to charge.”
"FROM HAVING AN OLD-FASHIONED, MANUAL PROCESS, OUR SITUATION HAS BEEN COMPLETELY REVOLUTIONISED. IT NOW TAKES THE SAME PERSON JUST ONE AND A HALF DAYS TO PROCESS A WORKLOAD THAT TOOK AN ENTIRE WEEK PREVIOUSLY. IT MEANS WE CAN HANDLE GREATER VOLUMES OF DATA WITH FEWER PEOPLE, AND DELIVER THE EXTRA INFORMATION OUR CLIENTS CRAVE."

EASY, FUJITSU & ABBYY JOIN THE DIGITAL DOTS
Based on Wilmington's positive previous experiences of working with EASY Software, the Insight organisation approached the company to see if there was an affordable technology solution it could implement to reliably automate and accelerate its data capture and management processes.

EASY engaged technology partners ABBYY and Fujitsu. ABBYY, which specialises in optical character recognition, document capture and language software, provided its FlexiCapture data capture and document processing solution. Fujitsu scanners capture images of incoming paper documents, which are then 'read' and deciphered by the ABBYY software. This can intelligently pick out key information on a page. "The combination of technology EASY recommended has proved a great fit, and really captured what we needed," Polly says.

To increase accuracy and efficiency, EASY and ABBYY established four different templates to cater for common differences in the way the particular source data is submitted. Scanned images and extracted data are sent through EASY's own EASY Documents workflow solution. This prompts final checking and correction of any inaccurate data, and adds the ability to quickly and easily search and retrieve content. Once verified, the data is sent via XML to Wilmington's database.

STAYING AHEAD OF MARKET DEMANDS
"From having an old-fashioned, manual process, our situation has been completely revolutionised," Polly says. "It now takes the same person just one and a half days to process a workload that took an entire week previously. It means we can handle greater volumes of data with fewer people, and deliver the extra information our clients crave."

"We've increased the data populations for all of the documents we get in, which means we can put more data products out there, making us even more competitive," she adds. "We were already unique in what we do, but now we've further sharpened our edge, maintaining our advantage."

EASY's digital content solution has been live at Wilmington Business Intelligence for 18 months, and the organisation already has its sights on further enhancements. "We hope to upgrade the ABBYY software soon as the latest version is even more intelligent," Polly says. "For example, it can recognise where a letter should be a number or vice versa."

In the meantime, EASY has been helping the business migrate to a new database. It has replicated the existing database software so that workflow can be comprehensively tested - to check it will continue to work seamlessly in the new, improved repository that is developed by an external third party. "EASY has pulled out all the stops to smooth this transition for us, ensuring that the XML feeds still work, etc," she notes.

The company also wants to be able to cater for original content that comes in digitally, as suppliers begin to automate their own processes and submit source documents electronically - a practice Wilmington fully supports. "It will save further administration time at our end, and save on paper costs - by eliminating the need to print or scan source content, only to re-enter it manually," Polly explains.

As to the cost/benefits of the EASY digital content management solution to date, she adds, "We're definitely unlocking savings from all the efficiencies we've gained, and that doesn't even take into account the additional value we're able to offer our clients."

More info: www.easysoftware.co.uk
Anytime, anyplace, anywhere

Markus Pichler, Director of Solutions at ABBYY, discusses the growth of compliance-led multi-channel capture processes

Companies across the UK receive a daily influx of documents from business partners, suppliers and customers. Each day the data tide continues to rise, making it difficult for organisations to keep the massive amount of data under control. To effectively deal with growing numbers of documents, companies must ensure information travels through the right channels and is processed as quickly as possible.

Many businesses have wised up to the benefits of implementing an electronic document management system to create efficiencies and convert the information contained within documents into value-adds. However, for many organisations a data collection system is also essential to meet compliance and regulation requirements.

To meet these requirements, modern document management systems have to adapt to the legislation of different countries and at the same time meet the steady growth of data and documents and changing business needs.

SIMPLIFY BUSINESS PROCESSES

Through the use of document management systems, business processes are automated and simplified. It is not only the quantity of data that poses a challenge to business owners nowadays. Managers today receive data from a variety of sources and in several different formats. These all require an error-free document and data capture process, which manual forms of entry and archiving simply cannot achieve.

THE CHANGING WORLD OF WORK

Today, multi-channel capture must play a part in companies’ document management strategies. We are moving away from employees being located in one central office. Instead, the modern workforce is typically spread out across branch offices, home offices, working remotely on the road or at a customer site. With this, document management must evolve to become more agile and scalable. The full process - from scanning, detection and indexing to search, processing and archiving of digital images, electronic documents and data - now takes place within increasingly diverse channels. These include scanners, multifunction printers (MFPs), e-mail, fax and the ever-frequent use of mobile devices.

Adding to this, many documents and data legally have to stay protected and accessible for several years. Document management has developed accordingly: from the simple scanning of paper directly to one or more locations, through to collecting information from different channels, whilst complying with regulation and guidelines according to country specific requirements.

How has it evolved? To integrate multiple location offices and mobile workers into the business process, document capture and processing increasingly lends itself to be carried out in the cloud. This enables companies - and their workforces - to gain flexibility. But that’s not the only benefit. Web-based technologies such as the cloud and web capture offer the highest safety standards that many organisations require during data transmission. Special security standards help prevent data snooping and protect sensitive data that reaches the hands of third parties. So, how does this apply to your business?

IMPROVE CUSTOMER SERVICES

Ever since smartphones and tablets have erupted into everyday life, the topic of location-independent document capture has come to the fore. Many companies
use this to promise a competitive advantage - whether it be improved customer service or shortening their reaction time to customer enquiries. With the right technological support, organisations can accomplish both at the same time, and even reduce costs. For the banking and financial sector especially, mobile capture is playing a major role in transforming businesses. Many banks already enable their customers to automatically transfer funds and complete other such transactions through their phone. The submission of insurance claims via a mobile device - for example, after a traffic accident - makes it possible to cut down on the long wait on any repayments, and receive decisions faster. In these instances data privacy also plays a pivotal role. Customers increasingly rely on smartphones and tablets to submit sensitive information. Organisations have the responsibility to ensure the data is securely encrypted for internal processing and protected from unauthorised access from third parties. Multi-channel capture solutions enable this balancing act between long-term data security and privacy in customer communications.

SAFEGUARD BUSINESS FOR TODAY AND TOMORROW
For the mobile workforce such as sales teams or the transport and logistics sector, the option of remote document management is a big advantage. From processing insurance applications for customers on the spot, to capturing expense reports, mobile document scanning increases efficiency and delivers competitive advantage. Indeed, this concept of on-demand capture - collecting information directly at the source, anytime and on any device - is emerging more and more as a growth market for multi-channel capture. In compliance terms, mobile capture solutions make it possible to automate data collection and processing for data use in back-end systems whilst meeting regulatory requirements, to safeguard businesses now and into the future.

More info: www.abbyy.com
Legal challenge
Simon Hill, Sales Director UK & Ireland at Nuance Communications, examines how technology is assisting legal firms to achieve 'diligent digital documentation'

Where have all those shelves full of beautifully bound case law books gone? What's happened to the sound of hundreds of typewriter keys clicking? Has anyone seen the likes of Rumpole of the Bailey lately?

Technology is transforming everything and nowhere is this more apparent than in today's modern law firms. For many of them, long gone are the luxuries of a dedicated legal secretary and countless other specialists that took care of so many manual and paper-based processes. From expense management and reporting to litigation support and court filings, an increasing number of law firms are automating and enabling end users to directly access these once tightly managed systems, with the goal of boosting productivity and efficiency.

The impact of technology is affecting more than just processes. In fact, many more large law firms are moving into smaller spaces. This means that three or four attorneys now share a single legal assistant, meaning that efficiency and accessibility are going to be the keys to success in the new, dynamic digital age.

All this rapid change and automation has inevitably changed the conversation technology suppliers have with their customers. No longer is today's pitch about billable rates, copier volumes or print speeds. Instead, now the conversation is about addressing the business challenges of the firm and its talent - matters including security and compliance, increasing workflow efficiencies, lowering costs and - here's the big one given how many processes are now automated - being intuitive enough to use for the likes of good old Rumpole, in case he decides to visit the office.

THE CAUSE OF THE PRODUCTIVITY BOTTLENECK
While it is encouraging to see the legal profession embracing technology, a report commissioned by Nuance Communications entitled 'Better technology, greater efficiency' indicates that there is still work to done when it comes to firms deploying time-saving technology. The report showed that the productivity of SMBs - including law firms - across the UK, Germany and France, is still being hindered by the management and creation of text-based documents.

The research showed that 38% of SMBs spend an average of two hours per day working on documents, with 14% of UK, 10% of German and 9% of French SMBs spending more than five hours per day working on them. 13% of all SMBs questioned said managing, creating and editing text-based documents is a greater waste of time than too much travelling to meetings.

ACHIEVING DILIGENT DIGITAL DOCUMENTATION
Despite their efforts to modernise, these document-related inefficiencies are worse in law firms. The research found that 25% of law firms spend up to four hours a day working on documents, and 19% spend up to six hours a day. Assuming a five-day week at eight hours per day, those four hours a day aggregate to 126 lost working person-days in the UK, France and Germany.

However, according to the International Legal Technology Association's (ILTA) 2014 technology survey, the 'secret sauce' of those law firms that are using technology to successfully address their productivity challenges, appears to be solutions developed by the likes of Nuance Communications. ILTA's report cited Nuance's Dragon, Power PDF, eCopy and Copitrak products as leading technology solutions for law firms; their ability to transform input from computer files, paper or the spoken word into intelligently formatted, searchable and editable documents, drives productivity, compliance and enhances profitability of all firms of all sizes by seamlessly tracking and charging back billable activities to the firm's clients.

For those law firms that are using Nuance's solutions, they are taking the lead in helping the profession make the transformation from one rooted in paper, to one where digital content - and the productivity it unlocks - is king.

More info: www.nuance.co.uk
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This year’s AIIM Forum UK will identify and explain the most significant trends and innovations to help improve your information management strategy, with expert advice from John Mancini and Doug Miles from AIIM (The Global Community of Information Professionals) – plus many of the industry’s most innovative thinkers.

Wednesday 24th June 2015 London

The UK’s FREE Independent Forum for Information Management

Time to Transform your Information Processes
OPINION: MANAGING OFFICE COSTS

London is the most expensive office location in the world according to 12 Cities, a recent report by Savills. The city has overtaken Hong Kong, which had previously topped the ranking for an unbroken five year period. New York and Paris complete the top four most expensive places to work in the world, where the combined costs of renting residential and office space exceed US$100,000 per employee per year.

Savills' Live/Work Index measures: ‘…the total costs per employee of renting living and working space on a US dollar basis in 12 world cities.’ The report confirmed that big increases in office rents and the pound’s strength against the dollar have contributed to London’s ascendancy in the rankings. London’s real estate costs grew in US dollar terms by an annualised rate of 10.6% in the first six months of the year. Overall, the US dollar cost of residential and commercial accommodation in London has increased by 39% since 2008. At US$121,000 per year, London is now the most expensive city in the world in which to accommodate staff.

Although it’s climbed from 5th to 1st place since 2008, London is still far from the live/work accommodation costs record of US$128,000 a year. This was set by Hong Kong in 2011.

THE ‘EGO APPEAL’ OF LONDON’S SKYSCRAPERS

According to Knight Frank’s Global Cities 2015 index, London’s high-rise office space is the 4th most expensive in the world behind Hong Kong, Tokyo

Capital expenditure

As London becomes the world’s most expensive office location, Storetec’s Neil Robson looks at how public and private sector organisations can reduce their office costs.
and Manhattan. Office space in skyscrapers such as The Shard can command an average of £1,467 per square foot.

The report suggested that the ‘ego appeal’ of London’s upper floor skyscraper offices, with their panoramic views, can command a 15-20% premium over typical rents. The Global Cities 2015 index also found that London is the highest ranked European city, with capital values on upper floors more than double those of skyscrapers in Paris or Frankfurt.

THE RIPPLE EFFECT
London may be the most expensive city in the world in which to accommodate staff, but the wider UK market is also feeling the effects of rising office rents. According to the Cushman & Wakefield report, ‘Office Space Around the World 2014’, Manchester commands an average of £30 per square foot per year (sq ft/yr). This is up slightly from £28.50 in 2013.

In Birmingham, occupiers spend an average of £27.50 sq ft/yr on their office space, while rents in Edinburgh and Glasgow sit at £29 and £28 respectively.

REDUCING THE FOOTPRINT: DOWNSIZING OFFICE SPACE
Public sector budget cuts and the pressures that local government is under have been regular features in the news and headlines recently. As part of reducing their footprint, local authorities up and down the country have been cutting office space to make up for the shortfall.

What we’re seeing more and more is local authorities downsizing by condensing their office space. In some cases, organisations have downsized from three buildings into one building. Although it’s a quick way of freeing up space and cutting costs, it does create immense pressure on the space now available to these organisations. And it’s not just the public sector. The banking sector too has been subject to office space cuts.

A recent poll by CB Richard Ellis (CBRE) found that three quarters of banks with a presence in London plan to do this reduce floor space there in a bid to rein in spending and boost efficiency ahead of regulatory changes. This could also be partly due to a trend for relocating to smaller regional premises instead of having big offices in central London.

It’s thought this could cut the cost of real estate for banks by up to 40%, something that may be necessary as they cope with job cuts after the scandals of the credit crunch era. Also, since mid-2009, City rents have gone up from £42.50 per sq ft to around £57.50 per sq ft, meaning more firms may be keen to move to less expensive premises.

HOW GOING PAPER-FREE CAN HELP
With the recent cuts to the public sector, and office rents looking set to keep rising across the UK, there’s more reason than ever before to make sure every square inch of office space is put to good use. A quick and easy way to free up space is to go paper-free and get rid of those cumbersome filing cabinets. Document scanning, storage and online hosting can help organisations to do this.

By putting in place a document scanning system, paper records can be securely destroyed and will no longer need to be stored. For local authorities reducing their footprint and cutting costs, this can help them downsize without needing to move. And for businesses who can’t yet afford to move into larger premises, freeing up space in their existing offices would give them the breathing space they need to grow.

More info: www.storetec.net

PAPER DOCUMENTS: A WASTE OF SPACE (AND MONEY)?

How much space do paper documents take up? And how much do they cost to store?

The best way to work it out is to use this simple formula based on how many filing cabinets a business has:

One 3 ft. filing cabinet drawer = 10,000 documents/pages
One 4 drawer filing cabinet = 40,000 documents/pages
One 4 drawer filing cabinet needs 9 sq ft of floor space

Then calculate the annual cost of storing paperwork:

Number of filing cabinets x 9 sq ft = total square feet
Total square feet x office cost per sq ft (rent, rates and bills) = annual cost
ANALYSIS: SHAREPOINT

It is hard to believe that 14 years have passed since the original introduction of Windows SharePoint Services. According to Microsoft, there are now 125 million global SharePoint users and more than $1.5 billion in annual SharePoint revenues - not bad for a product once dismissed by the major Enterprise Content Management providers as not ‘real’ ECM.

Now, after more than a decade, SharePoint is everywhere. It was initially deployed as a point solution to solve the document collaboration problems of project teams and as a replacement to files-shares. This was a problem with a pretty basic set of requirements, but SharePoint undoubtedly delivered. But now, organisations are struggling with the implications of what it means to view SharePoint as a business platform.

In a recent AIIM study across more than 400 organisations, we found that SharePoint is widely adopted and use is still growing. Despite this, there are mixed results and there remains a lot of confusion regarding Office365 and the cloud.

IS THERE STILL A ROLE FOR SHAREPOINT?
SharePoint changed the entire way we look at content management. Where there was once an approach built upon very high per user costs, that met the needs of a limited number of specialised document professionals, there is now an industry centred around meeting the broad needs of a wide swathe of knowledge workers.

But AIIM’s research found nearly two-thirds of enterprises feel that their SharePoint project has either stalled (26%) or isn’t meeting their original expectations (37%). Only 11% of businesses feel that their SharePoint project has been a success. The main reason given for stalled SharePoint deployments is the failure of senior management to endorse and enforce SharePoint. Other factors included inadequate user training, whilst a general
AIMS research found nearly two-thirds of enterprises feel that their SharePoint project has either stalled (26%) or isn’t meeting their original expectations (37%). Only 11% of businesses feel that their SharePoint project has been a success. The main reason given for stalled SharePoint deployments is the failure of senior management to endorse and enforce SharePoint.

Lack of planning, investment and expertise are also cited. Of course, adoption is an issue with many enterprise tools, not just SharePoint. But the increased competition from more user-friendly tools, such as Box, Huddle and Dropbox will surely also have had an impact on users’ inclination to use SharePoint.

Cloud Confusion
It is also clear from the research that there is much confusion around different versions of SharePoint. As a browser-only product from day one, Microsoft has always been in a strong position to offer cloud-hosted SharePoint. However, in addition to the security issues which affect all cloud services, the heavy customisation that many users undertook for SP2007 and SP2010 has played against the SaaS requirement to standardise the codebase, and Microsoft has struggled to match functionality between on-premise and cloud versions. In addition, integration with third-party products, and interconnection with on-premise enterprise systems have caused considerable hesitation from users. Despite that, the number of respondents firmly grounded on-premise has reduced since 2013 from 24% to 14%, and those who are undecided from 43% to 33%. This could be considered a rapid change. In fact the net take-up of plans in favour of SharePoint is SP2010 has played against the SaaS model, putting only the more collaborative content in the cloud.

Looking at across company sizes, smaller organisations are more likely to go completely cloud, both with 365/Online or private (17%), and the largest companies are the biggest supporters of a private hybrid of cloud and on-premise (16%). Mid-sized organisations are the more reluctant to make a decision as yet (47%).

The biggest driver given for moving SharePoint to the cloud is cost savings in IT, followed by improved access for external partners and for mobile. 31% have a positive strategic direction to adopt cloud, compared to 21% who seem to be loyal following Microsoft’s roadmap. When asked about the biggest issues for using a cloud or hybrid solution for SharePoint, security rated the highest, with 62% considering it a major concern, followed by concerns about information governance (51%), managing hybrid allocations (46%), integration with on-premise systems (45%), migrating content (43%) and geographical location of servers (43%).

A Clear Future?
However, only a very small number of users - less than 8% - are considering actually replacing SharePoint with an alternative product, and only 1% have done so. For most there is a strong commitment to making SharePoint work for them as a core platform, embedded in and connected to the enterprise. Many are working more strongly within a new information governance framework, adding third-party add-on products to remediate existing data, and to fill the functionality gaps, particularly for workflow, metadata management and collaboration. Many are also looking at the 365 cloud options to improve access from mobile, and for collaboration with external partners. And a strong overall theme is training, customisation and auto-classification to improve both user acceptance and ongoing data quality.

This is no real surprise, as SharePoint remains a versatile platform, regularly updated with feature improvements, and in particular the eco-system of add-on products.

The key to maximising value from it though, is in reviewing SharePoint from a business, not IT perspective. If a SharePoint deployment is stalled, or failing to add new value, of course one should consider what the reasons are, and how these issues can be corrected. But this should always be approached from a business perspective, not IT. SharePoint is a business tool and should be assessed as such.

Senior buy-in is also critical. This is a failing of many enterprise technology projects, and SharePoint is no exception. Endorsement and confirmation from above that SharePoint is your go-forward strategy for ECM and records management (RM) will mean securing budget for both training and system enhancement is more straightforward.

Finally, always keep in mind that the ultimate game for Microsoft is Office365.

www.document-manager.com March/April 2015 @DMMagAndAwards www.aiim.org
A cure for the paperwork headache

Leicester-based pharmacy County Pharmacy has found a remedy for previously unmanageable paperwork

Life for small business owners is evolving. This is the case for the pharmacy sector as much as it is for any other kind of business. In an increasingly bureaucratic environment County Pharmacy, based in Leicester, faced the challenge of going through a number of administrative processes for the various organisations it deals with - from government bodies, to the HMRC and its various suppliers. A large part of this involves paperwork - signing documents, keeping records, producing documents at a moment's notice whenever necessary, and so on.

The primary concern for Divyesh Shah, owner of County Pharmacy, was that dealing with these mountains of paperwork is not income-generating activity and took up a large amount of time - a resource which is particularly valuable for small businesses like County Pharmacy.

TRANSPARENCY AND ACCOUNTABILITY

There are several organisations to which County Pharmacy has regularly to provide paperwork. First of all, there are the tax and VAT bodies. Then, there are all the agencies with which County Pharmacy holds contracts, such as NHS England, primary care trusts and clinical commissioning groups. These contracts all require compliance with clinical governance and standard operating procedures (COP).

County Pharmacy also has to deal with a large amount of documentation when it comes to its supplier relations. And finally there is the customer-facing side of the business, which could mean doctors, local surgeries, patients and patient groups.

FINDING THE REMEDY

County Pharmacy decided to install a Fujitsu fi Series document scanner to improve its paperwork management systems. This scanning solution came from PFU Imaging Solutions, the manufacturers of Fujitsu scanners, and its partner QC Supplies, whom County Pharmacy met at the Commissioning Show, a national trade event for England's health and social care community.

Before getting a hands-on experience with scanners, owner Divyesh Shah was under the misconception that scanning was a time-consuming, clunky process, and that scanners took up unmanageable amounts of room. Seeing the fast, compact, simple and efficient solution that PFU offered County Pharmacy with their Fujitsu fi Series scanners was therefore something of an eye-opener.

Shah commented: "People often don't know they have an issue until it is pointed out to them. PFU and its partners helped us identify what our needs were and have provided the necessary solutions for us to be able to address them."

POSITIVE OUTCOMES

Keeping records of financial paperwork such as invoices and credit notes is of utmost importance to a business like County Pharmacy. When making payments to suppliers, for example, records have to be made of all payments in the month - who has been paid and how much. The scanner enables County Pharmacy to keep track of all these payments with one simple scan.

"It's particularly useful when it comes to any queries or challenges around overlooked payment," explains Divyesh Shah. "I know that I have records of all payments stored securely in one place, so that I can quickly and easily demonstrate evidence and clarify any queries. Without the scanner this task could take up an entire evening." County Pharmacy also keeps digitised records of purchase history, which is an important way of analysing patterns of purchase behaviour and forecasting future stock levels. It also means that if Divyesh ever decides to sell his business he has a fast means of illustrating the worth of business.

"It was essential for us to be able to retrieve documents and information quickly whenever necessary," explains Shah. "Now, being able to do this means having more time to focus on
developing and improving the business."

PUTTING PATIENTS FIRST
Accuracy is of utmost importance to a pharmacy because nothing can go wrong when it comes to ensuring the right medication goes to the right patient at the right time. Anything that interferes with this not only means stress for the pharmacist but it is potentially dangerous for patients. Any mistakes made in the process would, of course, fall on the shoulders of the pharmacist.

Divyesh Shah goes on: "The health, safety and wellbeing of my patients are my number one priority. The thing that helps me maintain this focus is the way I run my business. The more I improve and streamline the business processes, the more I can concentrate on what’s important - the patients."

CLOUD FUTURES
Divyesh Shah’s vision of the future is an almost-paperless one: “Paper is of course a necessary and essential part of business today, but my vision for County Pharmacy is to go as paperless as possible.”

County Pharmacy is also excited by the developments in cloud technology; being able to scan directly to cloud could provide a lot of opportunities for more efficient storage, sharing and backing up of important information. Finally, one of the most important benefits that the scanner has brought to County Pharmacy is the way in which staff members think about storing paper documents. It has taught them that there are very few documents that need to be stored in paper form and that the rest can be scanned and thrown away. This change in mentality is very important for small businesses when it comes to reducing clutter and streamlining business processes, and is something that County Pharmacy values highly moving forward.

More info: www.fujitsu.com/emea/products/
THE VALUE AND IMPORTANCE OF METADATA

The value and importance of metadata is one of the most underrated aspects of information technology (IT) today. Often defined as 'data about data', it has been a lightning rod for misinterpretation and myth, which has undermined its significance and fuelled misunderstandings about the impact it can have on information management and other IT disciplines.

Experts say that the more valuable the information asset, the more metadata you'll find associated with it, and therefore the more critical managing metadata becomes to your organisation. According to the Gartner research report, 'How Metadata Improves Business Opportunities and Threats', 'Metadata unlocks the value of data and, therefore, requires management attention. Failure to manage metadata properly will hamper critical activities such as information management, business process management and service-oriented architecture (SOA) initiatives'.

Unfortunately for many companies, metadata continues to be an afterthought, particularly where information management is concerned. As a result, many of them are missing out on the myriad business benefits that proper metadata management offers.

WHAT IS METADATA AND WHY IS IT IMPORTANT?

Wikipedia defines metadata as 'structured information that describes, explains, locates, or otherwise makes it easier to retrieve, use or manage an information resource'. Examples of the most basic metadata associated with documents include informational properties such as author, date created, date modified and file size.

Documents and other information assets are not of value unless they can be found and reused, and finding data fast can mean the difference between work getting done today versus tomorrow - or not at all. Metadata offers a powerful and effective way to access, organise and track vital business information and processes.

Also important is the value that metadata offers for creating associations and relationships between documents and other information across one or more repositories or related applications, such as an ERP or CRM system. In addition, metadata offers significant benefits for instituting consistency in the way information is used, stored and shared, as well as providing clarity about data histories, and ensuring workflows and business processes are properly followed and administered. For example, metadata

Meta is better

Understanding the importance of metadata is crucial for 'next generation' Information Management, argues Julian Cook, UK Business Development Director of M-Files Corporation.
may include information on the lifecycle of a document, including the users, processes and applications involved in its creation, revision and ultimate archival, retention and destruction. This includes granular details that drill down to the exact timestamp of changes and actions, such as reviews and approvals, as well as the access permissions involved in performing them.

In other words, metadata organises and tracks the entire digital lifecycle of important business information, including the processes and users that affect it, providing a precise audit trail that can prove invaluable — or mandatory in highly-regulated industries. Protecting and organising this audit trail is yet another reason why metadata should be a cornerstone of your information management strategy.

The value of metadata lies in its ability to more efficiently classify and organise information, as well as to yield deeper insight into the actions taking place across your business. This insight provides more intelligence and higher quality information to fuel big data initiatives, automation, compliance, data sharing, collaboration and more. Yet, many information management applications use metadata only as an additional information layer and rely on traditional folder structures to organise information. Consequently, users consider metadata as something optional and as extraneous work, which often leads to bad metadata quality. On the other hand, effective metadata-based information management systems only ask users to describe the document or data object with tags and properties when saving it. This enables users to search for information in a manner that is most logical to them (i.e. project name, date, contract type, customer, etc.).

MANAGING METADATA: A BEST-PRACTICE APPROACH

Metadata exists for all structured content in your organisation, and most unstructured content (i.e. documents and other files) also contains basic metadata properties, such as name, size, type, author, various dates and other attributes. Microsoft Office files (i.e., Word, Excel, PowerPoint and Outlook), for example, contain considerable metadata information, such as number of pages and words, and the name of the person who modified the document last.

But rather than looking at metadata simply from the perspective of the file attributes it provides (i.e., date created or modified, size, etc.), forward-thinking organisations view it from a holistic business perspective. When you consider that it contains specific properties that not only relate to critical elements of the organisation, but that can also be proactively applied to drive processes and classify data intelligently, such as by project, customer, workflow, state and other factors, then you start to recognise the powerful role it can play in information management.

This brings up another key point: What companies need to concern themselves with is not so much where metadata resides, or what attributes it contains, but what the information represents and how it should best be organized and managed. In addition, metadata-based approaches to information management that enable information to be categorised not by where it is, but by what it is, are gaining ground as the preferred choice over folder-based information management and document management systems with limited metadata management capability. That's because it makes for a more effective and faster search to describe what something is rather than guess where it's stored (which folder it's stored in, for example).

To get to the ‘what’ that's behind metadata, many are turning to a best practice approach of managing metadata separately, rather than it being embedded with the file itself as in standard Office documents in Windows. This approach takes into account the entire scope of enterprise content, including the idea of metadata associated with information for which no file exists. For instance, an audit or a deviation in a quality environment is not a file, but it is critical information for which metadata exists. So by definition, to support this, the system must manage metadata separately from the file itself.

Furthermore, when metadata is not embedded in files but managed separately, IT administrators gain more flexibility to:

- Manage metadata structure using centralised tools
- Support adding metadata to all documents regardless of file format
- Add metadata to objects that do not contain files (or objects that contain multiple files)
- Easily and dynamically manage access permissions controls to ensure only authorised individuals can access, edit and/or approve certain files

Effective and consistent metadata management ensures that all enterprise information is searchable, available and exportable - regardless of file type, format or object type -- underscoring again the idea that data is not valuable to an organisation unless it can be found.

Many organisations are just starting to recognise that metadata can form the cornerstone of a dramatically more effective information management initiative. With a metadata-driven information management solution in place, companies can leave the limitations and hassles of outdated folder-based approaches behind, while taking a quantum leap forward with a strategy that covers all the bases.

The result is faster, more efficient search and navigation, as well as more effective access controls and workflow management. All that translates into more time for your organisation to innovate, sell and outperform the competition - in other words, to do what it does best.

More info: www.m-files.com
The impact of virtualisation, cloud computing, and the need for data flexibility across cloud environments, all mean that storage has had to change with the times. Organisations are now turning to the cloud for backup and storage options. Cloud storage essentially enables you to store data remotely and is a classic example of the consumerisation of technology, where consumer markets come to drive IT innovation and propel it to the forefront. However, while cloud-based storage offers businesses a number of benefits, organisations can often be faced with an unstable environment.

THE GOOD, THE BAD, THE UGLY
The amount of media hype around cloud is at an all time high. Some may argue that using a cloud service is cheaper than traditional computing; another common cloud value proposition is that it enables a more rapid transition to mobile computing. However, there’s one use case for cloud that often falls under the radar - it enables better disaster recovery, which is something that many organisations, large and small, struggle with.

The ability to store data in the cloud has made life a lot easier for users - not only is it easy to sign up for and fast to implement, cloud-based storage is designed to be user-friendly, providing seemingly limitless availability of new capacity and access to enterprise class facilities. Traditional data apps are not mobile apps, however - once a data app is ‘cloudified’ it can offer many of the same advantages, such as access from anywhere that you can get signal, and on any connected device.

However, when relying on the cloud for backup organisations can often be faced with an unstable environment. Cloud computing essentially involves the delivery of hosted services via a shared wide area network (WAN), such as the internet.

Regardless of the type of cloud initiative, they all have one thing in common - data is centralised, while users are distributed. This environment can be prone to instability, which can jeopardise entire storage investments. Failing to address this and ensure a
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stable network, can lead to higher disaster recovery costs and missed Recovery Point Objectives (RPOs) and Recovery Time Objectives (RTOs). This can result in increased expenditures as organisations try to make up for limited replication throughput and poor connectivity by buying more WAN capacity.

It is therefore critical that organisations are aware that the only way to ensure optimal data delivery is to establish a fully equipped network that will be able to cope with the increased flow of traffic storage initiatives bring. To do this, organisations need to optimise the WAN, which can reduce over 90 percent of the traffic across the network and provide the scalability needed to support all current and emerging applications.

CONSIDERING THE OPTIONS
The prospect of storing data in the cloud can be daunting for some organisations, so there are a number of alternatives to cloud backup. These include traditional tape-based, disk-based or hybrid storage. A good option is off-site disk backup, which is an ideal business continuity upgrade for organisations that need the shortest possible recovery time when disaster strikes, but cannot afford to replicate their entire systems to a duplicate data centre.

When comparing these alternatives, disk backup is almost always faster than tape, because there are none of the data-seek or media mount delays typical of tape. With tape, you have to wait for the media and the drive to become ready before you can access the data.

The key thing for business continuity and disaster recovery is that the disk backup is off-site, either at a secondary site, or at a co-location centre. The challenge for many organisations will therefore be the WAN traffic involved in doing that disk-based offsite backup - and, of course, recovery.

DON'T GET STRANDED IN THE CLOUD
Technical requirements need to be carefully considered as data that is stranded in the cloud is useless. If business critical data is going to be protected in the cloud, there needs to be a way to restore the data into a Virtual Machine (VM), or onto a physical server, for rapid recovery. If the data must be downloaded first, the solution should not be used for anything critical.

Bandwidth at the provider also needs to be considered, as any limitation can reduce the speed to backup or recover, jeopardising RPOs and RTOs. Furthermore, retention at the cloud provider also needs to be taken into account. Any corruption or virus that spreads over time will require a restore to a specific point in time, which could go back several days, weeks, or even months. If the provider only stores a limited amount of data for restore, the business could be at risk in the event of data loss.

Finally, the cloud provider's business health needs to be addressed very carefully. There are many providers that have started quickly with limited funding, and having all of your corporate data stored with one of these providers can put the business at risk. Even providers with well-known funding sources have failed recently, leaving business exposed to data loss. So, when planning for disaster recovery it is important to make sure that data and applications are protected properly.

There are several different methods to perform backups, but choosing the correct method is determined by the value of the data, and the organisations' tolerance for loss. Business critical data should be replicated to a remote disaster recovery site, allowing for short RTO. This same data should also have snapshots taken for local recovery, and rollback in the event of a corruption.

Continuous Data Protection (CDP) is another option for fast local recovery, and most of these tools even include replication of some type. This data can also be backed up to disk, tape or the cloud for an additional level of protection. These create many copies of the same data, and the real guide to which should be implemented will come from the business requirements.

Ultimately, it's up to the organisation to decide whether cloud storage is the right path for them. Many will reap the benefits that storing data in the cloud has to offer, but only if they have a fully equipped network and the right tools in place. Failing to do this will result in the cloud investment either underperforming or failing entirely - a risk that today's businesses cannot afford if they wish to stay competitive.

More info: www.silver-peak.com
The Royal Commission on the Ancient and Historical Monuments of Scotland (RCAHMS) has chosen Preservica Enterprise Edition as the trusted digital repository for its unique and extensive collections of archaeological and architectural maps, drawings, photographs, documents and audio-visual content on the changing landscapes and buildings of Scotland.

RCAHMS was established in 1908 by Royal Warrant. Its mission is to help people to value and enjoy their surroundings, provide a world-class record of the historic and built environment to local, national and international audiences, and advance understanding of the human influence on Scotland’s places from earliest times to the present day.

The collection currently amounts to millions of digitised and born-digital objects with around 100,000 new items being added every year.

RCAHMS’ multimedia collections, used by researchers, students and the public, include the architectural drawings and photographs of Sir Robert Lorimer; images of buildings, locations and artefacts from the battle of Bannockburn; images of Andrew Carnegie funded buildings in Scotland; the drawings of renowned antiquarian James Drummond; recent AV footage of underwater and maritime archaeology; as well as up to the minute collections of data and images from complex laser scanning and geo-physical surveys.

In addition, Preservica Enterprise Edition will become the long-term home for the National Collection of Aerial Photography (NCAP), managed by RCAHMS, that includes over 1.6 million images of Scotland from the air, as well as many millions of military aerial intelligence photographs from around the globe.

Lesley Ferguson, Head of Collections at RCAHMS adds “We have been working to develop the right systems to ensure our unique digital collections are properly preserved and accessible for future generations. We started by building our own in-house system but soon concluded that this was not sustainable in the long term and that a standards-based Digital Preservation system was what was required. It was also important that the system enabled us to manage and migrate file formats as we go forward. This approach allows us to focus our resources on the collections, the quality of our digital content and the delivery of services to our many users.”

Aimed at larger organisations, Preservica Enterprise Edition includes a full suite of customisable OAIS (Open Archival Information System) conforming workflows for ingest, management, storage, administration, preservation and access to digital content as well as off-the-shelf connectors and open APIs for easy integration with existing platforms and systems. The solution is designed to be hosted on premise but also includes storage policy management tools and connectors to enable organisations to build “hybrid” storage models that combine local and cloud storage options.

Preservica Chief Executive Jon Tilbury commented, “We are delighted that RCAHMS have chosen to join the growing number of National Archives and Libraries using Preservica to safeguard and provide access to their unique and extensive collections and archives. We also look forward to RCAHMS’s contribution to the Preservica User Group and in helping to shape the future of digital preservation”.

More info: www.preservica.com
Information: the new currency

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