Keeping the score:
New York Philharmonic digitises 8 million pages

Risky business:
Training staff on handling confidential data

Interview:
John Mancini, AIIM

Long term archives:
Will you be able to read your data in 100 years?

Product Reviews:
Xerox, ITESOFT, OPEX
C-Cube Solutions specialises in providing Electronic Document and Content Management solutions based on the C-Cube software suite. Systems scale from departmental applications to enterprise wide solutions and include: the C-Cube Portal, Electronic Forms, Content Searching, Workflow/Collaboration, COLD/microfiche integration and EDRMS.

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13 Diamond Court
Opal Drive, Fox Milne
Milton Keynes,
MK15 0DU
tel: (01908) 677752
fax: (01908) 679444
email: info@ccubesolutions.com
web: www.ccubesolutions.com
This issue includes a fascinating opinion piece from Arkivum's Nik Stanbridge which revisits a theme that we have covered in DM several times over the years that I've been at the helm - yet one that never seems to go away, nor be entirely resolved to anyone's satisfaction. The topic is that of long term archival systems, and the potential issues that can - indeed almost certainly will - arise at some point in the future when it becomes necessary to recover data from an archive that was created on a platform that is no longer supported.

How can any business really plan for this? Clearly it is not practical for every organisation to keep a spare working piece of hardware 'in mothballs' for decades in order to be sure that records will always be accessible. How many of us still have 5.25inch floppy disks in a drawer somewhere, for instance? I'd be willing to bet it's more than will admit it. But what's the point if there are no drives that can read them? The alternative has so far been a never-ending cycle of platform refreshes that requires an organisation to migrate everything in its archive to a new platform on a regular basis. This is likely to be a recurring problem until someone comes up with a 'holy grail' archive solution - one that will remain readable into the future.

Nik's article mentions the much-vaunted M-Disc technology that may or may not prove to be such a salvation. But as he says in his piece: "There is no history of a digital medium being easy to read long after the technology that wrote it is no longer available (digital tech is simply too young). And because there's no history of this happening, I doubt anyone would be willing to take the risk of 'storing and forgetting' with this one."

It might appear then that the only true solution is one that doesn't require a high-tech medium to read it - like our old friend microfilm and fiche. But surely it is never going to be practical to convert all of our records management mountains back into unwieldy - albeit readable - physical film archives? And in any case, where would that leave the ever-growing volumes of digitally originated data, unstructured data, multimedia and social network records? No, film still has its use of course, but in a world that increasingly thinks in Zettabytes, we really will need an innovative technology solution - and one with genuine backward compatibility built in from the outset. Whoever solves this conundrum may have truly built the better mousetrap.

Dave Tyler
Editor
david.tyler@btc.co.uk
EASY Software unveiled its new ECM Suite at its annual partner event, held this September at ZSL London Zoo. DM Magazine editor David Tyler was there to find out more about what the company describes as ‘cutting out the fat to add value to classic document management’.
EASY Records for HR

For hundreds or thousands of candidates, applications, CVs, correspondence, contracts, forms, documents.

1. Preconfigured solution that maps the personnel records to the organisation
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5. Support for the import of master data and imaged documents
An education in the cloud from ABBYY

Texthelp, a long-term customer of ABBYY and the market leader in assistive software for the education sector in both the UK and North America, has incorporated ABBYY’s Cloud-based OCR technology to perform text recognition in its Snapverter product, one of the newest additions to Texthelp’s portfolio of apps and extensions for Google Apps for Education users.

Snapverter is a handy new add-on tool for Texthelp’s ‘Read&Write for Google Chrome’ software that transforms classroom papers and files into accessible PDF documents. Teachers can simply point a smartphone at any document and snap a picture with the camera. The content is then sent to ABBYY’s cloud where the images are processed and converted into an accessible file for easy sharing with students within their Google Drive.

This Cloud-to-Cloud solution recognises text from a variety of documents and files and then makes it accessible to be read aloud by Texthelp’s extension for ‘Read&Write for Google Chrome’. Text from worksheets, book pages, diagrams and other paper based materials from the classroom - even photos and charts - are all included in the resulting PDF, which is stored in the user’s Google Drive. The ABBYY Cloud OCR SDK is a flexible and scalable online service for developers, system integrators and ISVs that allows them to easily enhance their applications by adding OCR, ICR and checkmark recognition.

www.abby.com

Docman has remedy for Hillingdon Trust

Since going live in 2014, the Hillingdon Hospitals NHS Foundation Trust have sent over 300,000 letters electronically through Docman Hub; an electronic postal service for the secure delivery of letters between healthcare providers.

The Docman Hub project within the Trust was part of the CQUIN target to remove the use of post and NHS mail to send documents. The Hillingdon Trust now sends a variety of documents electronically, from 41 specialties, which include discharge summaries, A&E attendance letters, specialist services letters and maternity letters.

Minal Patel, Senior Project Manager, The Hillingdon Hospitals NHS Foundation Trust said, “Our initial business case was based around the cost savings associated with removing the need to send paper. The manual process was inefficient and not in line with QIPP principles to drive forward quality improvements. Reliance on external post created additional pressure on turnaround times and information was not received by GPs in a timely manner.

“This could have a significant impact on patient care provided in the community which is reliant on this information. Docman has significantly improved information sharing between the Trust and primary care.”

www.docman.com

New fi series desktop document scanners

Fujitsu PFU has introduced two new fi Series document scanners operating at 40 pages per minute (A4, colour, 200/300 dpi; 80 images per minute duplex): the Fujitsu fi-7140 and the fi-7240 with integrated flatbed unit (pictured).

The cost-efficient scanners offer high-end features for reliable document capture such as GI processing, automatic mechanical skew reduction, intelligent paper protection and ultrasonic multi-feed detection, to ensure that paper is handled with maximum care and the best possible images delivered to the business processes.

Like all the members of the Fujitsu fi Series family, the fi-7140/fi-7240 models feature PaperStream software which has been designed for high quality image processing and enhanced batch scanning.

The recommended retail price for the scanners is £649 plus VAT for the fi-7140 and £1,099 plus VAT for the fi-7240.

www.fujitsu.com

Are HR departments becoming paperless?

A recent survey conducted by Archive Systems during the 2015 Society for Human Resource Management Annual conference found that 77 percent of HR departments are successfully going paperless.

According to the HR professionals surveyed, a combined 77 percent said they were either both half paper and half digital, mostly digital or all digital while only 23 percent said they were solely paper. Other survey highlights include:

• HR Managers who said their HR files were more than 50% digital, reported spending 35% of their time on administrative paperwork, a reduction of nearly half compared to industry surveys that have found 60% of HR resources are spent on administrative activities.

• Hybrid environments, both digital and paper, are making the greatest progress toward going paperless. However, the biggest issue is digital documents existing in multiple systems instead of being accessible from one company-wide repository.

• HR Managers that still have paper records are on average 50% confident that they have all the necessary documents for audits and compliance, but companies that are totally digital are on average over 70% confident.

www.archivesystems.com
Added Nuance for document processes

Nuance has introduced new versions of its capture software products, Nuance AutoStore 7 and eCopy ShareScan 5.4. AutoStore 7 is best suited for business processes capture workflows where participants submit documents and data into a predefined workflow. Business processes are planned, defined, managed and repeated consistently. These processes rely on both the document and associated key information required to manage finances, customers, vendors, inventory and other significant business operations. Regardless of where business documents are captured and entered into the workflow, whether from PCs, laptops, smartphones, tablets, MFPs scanners, email and the web, AutoStore seamlessly integrates the information into the organisation and its operations, directly contributing to business efficiency and profitability. eCopy ShareScan 5.4 is best suited for collaboration workflows where team member contribute documents and content to the team for further review and enrichment. By using the multifunction device within the workgroup's area, eCopy quickly and simply guides workgroup members through the process of properly capturing documents.

Nuance AutoStore is a springboard for further reviewing, editing and collaboration by team members. Release 5.4 greatly enhances user productivity and control over document collaboration, improves operational efficiency and communication, and supports compliance with laws and regulations.

More fillings, less filing with OnBase

Dentists' Provident, the leading income protection insurance provider for the dental profession, has selected OnBase by Hyland as its enterprise content management (ECM) system, to digitise the policy and claims processes and enhance its client offering.

The ECM system will augment the firm’s policy administration system to boost the speed and efficiency with which the firm can manage claims and process new business. OnBase will provide a fully digital document information hub accessible to staff across the company, creating a seamless interface with Dentists’ Provident’s existing line of business systems.

Farrukh Mirza, chief executive of Dentists’ Provident, said: ‘The decision to implement OnBase follows a wide-ranging review of current and future needs, as well as the technology options available. ‘While our core focus has remained largely unchanged in the last 100+ years, we recognise that today’s regulatory and competitive challenges require a different operational approach. By introducing a cutting-edge ECM system at the very heart of our business, we are continuing to build an organisation that is firmly positioned to meet the evolving needs of all our stakeholders.’

Colin Dean, account manager for insurance and financial services in EMEA for Hyland, said ‘It’s a long-term project that will offer advantages from the outset, such as improved digitisation of documents, and will then build as we work with Dentists’ Provident to integrate all their line of business systems.’

Multi-year contract win for Wincanton

Wincanton Records Management (WRM) has just announced a new contract win with SCC. As Europe’s largest independent IT services business, SCC has 40 years’ experience in providing private and public sector customers with IT infrastructure services. WRM will be providing SCC a full, bespoke, offsite data protection solution across the country.

WRM’s specialist services will include the supply of data tapes and other IT products, as well as provision of a dedicated collection and delivery service applying state of the art technology and robust security processes for the storage and management of SCC’s data tapes.

WRM will also be utilising WRM’s specialist ‘remote hands’ service. This service provides a qualified and experienced WRM operative who will have access to SCC’s Tier 3+ data centres to conduct tape exchanges from the vast array of tape drives. WRM will then store the exchanged tapes at their dedicated, compliant and secure vault facilities throughout the UK.

Moving forward, WRM will also build a bespoke facility for SCC, designed to meet their specific data protection requirements now and into the future.

IManage delivers solid foundation for DM

Hanson, the country’s largest supplier of ready-mix concrete, has deployed an email and document management solution based on IManage Work (formerly HP Worksite) from Ascertus Limited for its legal department. Ascertus provides tailored information and document lifecycle management solutions to in-house legal departments and law firms in the UK.

The legal department at Hanson now has a centralised solution comprising matter-related workspaces, enabling users to securely store all information pertaining to individual transactions across data sources - including correspondence, emails, and a variety of documents.

The IManage Work solution implemented by Ascertus is delivering efficiency gains to the company’s legal department. The email management system enables all outbound and inbound emails on transactions and associated documents to be saved to a central repository. Users are able to effortlessly share and locate information due to a simple, intuitive and indexed folder structure; and Google-like advanced text search capability offered by the IManage Work solution.

www.ascertus.com
The Shred-it survey (conducted by Ipsos MORI) found that although 24% of SME owners claim that human error, such as leaving sensitive information on desks, poses the biggest security risk to their organisation, more than a quarter (27%) do not have information security policies and procedures in place. A third of those who do, admit to never training their employees on these protocols.

Even more concerning is the fact that a third (32%) of small business owners are unaware of what constitutes confidential data, saying that they possess no information that would cause their business harm if stolen. However, say Shred-it, every business in the UK holds confidential data - from payslips to meeting agendas and employee or client records - that could lead to damaging financial, legal and reputational repercussions.

"Employee error is understandably a big concern for UK small business owners. Leaving documents on a desk or throwing a payslip in the bin could pose a huge risk to an organisation. But how can business owners expect their staff to understand how to deal with confidential information if they can't even identify what is confidential?" said Robert Guice, Executive Vice President, Shred-it EMEA. "Small businesses need to step up and take responsibility for ensuring that everyone in their organisation is aware of the sensitive data they hold. Putting in place protocols on how to deal with confidential information, or even adopting a 'shred-all' policy that all staff are aware of, is essential for SMEs to protect their businesses."

**ANOTHER FINE MESS**

Since April 2010, the Information Commissioner’s Office (ICO) has issued over £7 million worth of fines to organisations that have experienced data breaches. This is costing businesses millions of pounds; but despite such high figures, SMEs are still not doing enough to safeguard themselves against breaches from within their organisation. Investing in workplace training is key to ensuring that SMEs do not suffer costly fines which could cause irreversible financial damage.

Unlike SME owners, C-Suite executives are much more likely to train their staff on information security protocols, with 36% of C-Suite executives providing frequent data security training (twice a year or more frequently) compared to only 11% of SME owners. This regular data security training highlights that large businesses are more prepared and aware than their SME counterparts when it comes to preventing and identifying data security risks and avoiding financial penalties in the process.

Shred-it has called on SME owners to implement workplace training for all employees to reduce the risk of a data breach. This, they say, will ensure staff at every level are adequately trained on the importance of data security and able to spot and prevent potential human error-related slip-ups before a data security breach occurs.

More info: www.shredit.co.uk

**FIVE WAYS TO PREVENT A DATA SECURITY ERROR - BEFORE IT HAPPENS**

To ensure that employees know what to look for when spotting data security risks in the workplace, Shred-it advises small business owners to follow these tips:

- Schedule regular information security audits to identify problem areas - and solutions
- Introduce a ‘shred-all’ policy, which means all documents are destroyed prior to disposal or recycling
- Keep an inventory of all information that needs to be protected
- Schedule on-going training so employees understand best practices for protecting confidential information - in and out of the workplace
- Ensure employees are informed about the risks associated with data protection breaches and are well trained on which documents they should consider shredding and how to dispose of electronic data
BRINGING DIGITISATION
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Our professional and efficient approach to NHS scanning projects means choosing Restore as your partner in meeting your digitisation targets could be the best business decision you ever make.

Leeds NHS Teaching Hospitals Trust
Establishing an on-site scanning centre for maximum results
The project aim was to eliminate loose notes that follow patients on their journey through different wards. A full-time Restore team digitised paper, X-rays, photographs and ECG readouts, scanning directly on to the Trust’s own Patient Imaging System with a 100% unbeaten track record for accuracy.

Sheffield NHS Teaching Hospitals Trust
Enhancing security, 24/7 accessibility and staff efficiency
We are working with the Trust as outsource supplier, scanning high volumes of records from nine medical records libraries as they roll out a new Electronic Document Management System (EDMS). Our remit to enable simultaneous, multi-site, on-screen viewing by clinicians includes one million library files, 4.6m single attendance or admission files and around 340m images.

Restore's scanning service is carried out in a timely and efficient manner and this has helped improve our internal systems as well as save time for our legal team.

Jonathan Clarke, Liverpool Women’s NHS Foundation Trust, of the ongoing scanning project that helps the legal team stay on top of compliance and security

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Aneurin Bevan University Health Board has installed CCube Solutions’ eForms software to create a computer-based system to display children's growth records. It is the first end-to-end system allowing medical users across multiple sites to record and view children's growth chart data via a portal, as well as allowing data to be easily shared with other clinical, public health and third party analytical reporting systems.

Growth records are essential in the assessment of every child. Chronic diseases impact growth, so deviation from expected norms act as an early warning signal that something is wrong and medical investigation is required. Paediatricians and other health professionals have used them since the 1970s as a core tool to monitor children's development and well-being. They plot three key body parameters of the individual child - height, weight and head circumference - against national growth trajectories with this information then used to reflect illness or highlight other medical issues such as obesity which is a major issue today.

Aneurin Bevan University Health Board provides acute, community, mental and child health services from five sites for 693,000 people in South Wales, approximately 21% of the total Welsh population. In 2012 Aneurin Bevan was the first health board in NHS Wales to procure an electronic document and records management system (EDRMS) from CCube Solutions. The new growth charts application is fully integrated with this and accessed using a portal called Clinical Work Space (CWS).

Clicking on a button within the individual patient record launches the growth chart on a desktop PC. Authorised staff can then add in updated growth measurements into a dialogue box which automatically updates the chart displayed. A pilot was started in June 2014 with the system fully implemented and in widespread use by October 2014.

Children visiting Aneurin Bevan University Health Board are not issued with paper charts anymore. Within nine months of 'go live', growth data is available for 11,000 children.

INTEGRATING GROWTH CHARTS WITH EMR
Given the wholesale move to electronic patient records three years ago, a way of effectively managing children's growth records was required for two main reasons:

- Growth charts were the last paper documents in use and had to be circulated around multiple sites - in some sense, negating the value of installing a computer-based medical records system;
- Growth charts are dynamic documents which change constantly. Printing out individual graphs, adding a dot(s), scanning and then storing the chart again in the EDRMS was not practical given the time and impact on readability. Using a spreadsheet as an alternative was also considered cumbersome.

Aneurin Bevan University Health Board worked in close partnership with CCube to implement an IT solution using its eForms module which allows staff to record data points over a long period of time.

Dr. Tom Williams, consultant paediatrician (retired) and the clinical lead on the electronic growth records project, explains: "I’ve been involved in NHS IT for many years - this is not just about digitising a process. IT must supplant existing activities but over this improve them, which is what we are doing with our electronic growth charts application."
To develop the system, Aneurin Bevan University Health Board and CCube Solutions licensed national growth data from the Medical Research Council to create the background charts. The individual child’s development information is then ‘overlaid’ on top, with the actual data held in a Microsoft SQL database not embedded in the chart. Architecting the solution like this means easy integration with other clinical or research systems, enabling data to be re-used simply without wasteful IT support and integration costs.

**OPERATIONAL AND CLINICAL BENEFITS**

The electronic growth charts solution developed offers a range of benefits:

**Simplicity.** The easy to use desktop system means it is straightforward for nurses, clinicians and other health professionals to input growth data in clinic such that they are enthusiastic about doing so. Charts are available for children aged 0 to 2, 0 to 4 and 0 to 18 years old, along with charts for sufferers of Down Syndrome who have a different growth trajectory.

Additional features developed include the ability to display on the chart the ‘target height range’ for a child (what they might reach in adult life) based on entered data of parental height, and the display of ‘bone age’.

**Improved accuracy.** Subject to data entry being restricted to those staff who have been properly trained to measure children, the electronic plotting and calculation of data onto graphs has improved accuracy of the information recorded. With paper, there were always manual errors.

**Enhanced security.** Compared to paper charts where there was none, security policies and procedures have been established about who can view, input and approve growth chart data.

**Added flexibility.** The chart scope has been broadened with the system designed so that units can easily be changed as well.

Dr. Jeff Morgan, consultant paediatrician at Nevill Hall Hospital, Abergavenny, says, “I'm a supporter of the new electronic growth charts solution as it improves information accuracy and accessibility. With paper-based charts, there were a number of issues which slowed our clinics down. A child might have several incomplete growth records in their file charts and with inter-observer variability in data plotting, you could discover errors across the charts. Now, we have a neat solution which logs all the anthropometrical measures properly and displays the child’s growth potential clearly on screen. The fact that it is computer-based means the growth chart is easy to access at anytime which is useful when discussing patients with colleagues."

**IMPACT AND FUTURE SYSTEM DEVELOPMENTS**

The system is designed to offer future flexibility and functionality. For example:

- Clinical alerts can be set up if a growth data point for a child is input into the system outside expected boundaries;
- Hyperlinks are being added into the charts so that clinicians can link data points with other documents in the EDRMS and cross reference treatment given which might effect development;
- The system is device agnostic and, in the future, other devices could be used to view and update data whether that is via tablets or smartphones.

**CREATING A NATIONAL DATABASE**

Aneurin Bevan University Health Board’s electronic growth chart solution is currently used in the context of children presenting to its hospitals with an illness. It is not a record of all children within the region. If other Welsh health boards and NHS Trusts adopted the system, a national repository could be established which is where the true value of this system lies. Once data is electronic, it is easy to share, analyse and do statistics on.

Dr. Morgan says “The electronic system has great potential. If this project were to be extended to a regional or national level, we would have access to clinical information for a massive cohort of the paediatric population which would be very exciting for future child health monitoring studies.”

At the moment, there is only widespread measurement of children when they start primary school at ages 4 or 5 years old and later in year 6 (this under the auspices of the National Child Measurement Programme).

Dr. Tom Williams agrees: “Whilst this is currently an aspiration, building a reference set of data nationally which documents child growth in Wales and beyond would provide clinicians, health officials, politicians and, of course, the public with broad insight into the health and development of children, especially in terms of obesity. Put another way, this project could evolve into a massive Big Data public health opportunity of national importance.”

Vijay Magon, CCube Solutions’ managing director, says, “The effective management of children's growth charts is an absolute requirement for every NHS organisation introducing electronic medical records systems. The NHS is often criticised for how IT projects are procured and delivered. In contrast, we have worked hard together to develop and implement a cost effective, easy to use system which has the support of clinicians.”

More info: www.ccubesolutions.com
Captured at the Zoo

EASY Software unveiled its new ECM Suite at its annual partner event, held this September at ZSL London Zoo. DM Magazine editor David Tyler was there to find out more about what the company describes as 'cutting out the fat to add value to classic document management'.

There is, as they say, a first time for everything - and in early September I sat down with a coffee at the start of a day of DM-related content while just yards away I could see kangaroos and emus enjoying their own breakfasts. But this wasn't the launch of some new Antipodean capture software, it was the annual Partner Day of EASY Software, held this year at the (surprisingly summery) conference facilities of ZSL London Zoo. ZSL is itself a recent customer of EASY, so it was logical for them to decide on using it as the location for their latest London get-together, as the team are always on the lookout for ever more unusual venues (you may remember last year's ascent of the Dome in Greenwich).

The day began as usual with a round-up of performance facts and figures from EASY's UK head, Howard Frear: group sales revenues were up to over 40m euros in 2014, compared to just under 30m in 2013. Howard also discussed the effect of current and proposed acquisitions on pipeline business, including an SAP partner with some 400 customers. The company also has plans for a cloud specific product offering which promises to be a completely re-engineered solution. As EASY's Tony Cheung commented, 'It is crucial for us to continue to keep up with market expectations.' There was also praise for this magazine, and our sister title Storage, and the positive impact of both magazines' annual awards ceremonies (EASY was a winner in both competitions last year, and in the 2015 Storage Awards). Awards like these, enthused Frear, 'help EASY to stand out from the crowd'.

FOUR-PIECE SUITE

Product-wise EASY unveiled a completely new branding with the EASY ECM Suite, described by the company's George Haddaway as moving away from multiple offerings of the past (archive, retrieval, etc.) and towards a simplified, standardised, solution set: 'Our customers expect to be able to access our documents from anywhere and find what they're looking for. This new proposition has 'cut out the fat' and it will make our jobs easier, and those of you our partners, in selling it.'

The new EASY ECM Suite covers four process steps: Capture, Edit, Store and Forward. Capture, says EASY, is no longer just about paper, but has to cover email as well as the files attached, and also has to manage auto-routing of mails and documents to relevant project folders. Edit is focused on extracting, modifying, indexing etc. the captured data. Store relates to what most of us think of as EASY's 'bread and butter': their heritage in what Frear described as 'bullet-proof archive'. The Forward area is perhaps the most interesting and innovative aspect of the new branding, as Frear again commented: 'We're building workflow to be included in the base package, and more importantly we're actively encouraging people to use it - in effect we're saying don't just store the data, do something with it.'
As far as the modules themselves that are now available, there is one simple EASY Client offering, as well as EASY for SAP and EASY for SAP Invoices. There are also specific modules for Microsoft Office 365 and SharePoint, as well as application-specific modules for Invoices, HR, Contracts and Digital Files. These solution packages are the first point of focus on the updated EASY UK website. Howard Frear explained that they were already having success with the most recent (Contracts) solution, as users preferred its simple out-of-the-box configuration to more complex alternatives. One new user, AutoTrader, had ‘wasted’ 12 months trying to make SharePoint do what they needed, before switching to EASY Contracts - which was up and running within 4 days.

The idea behind the ‘business packages’ approach is to make EASY workflow affordable to more potential users, and to simplify the setup-deployment process at the same time.

POINTS OF VIEW
Another new announcement was EASY View Plus, (built on Oracle's Outside In rendering technology) which replaces the varied file viewer options in use previously. Frear explained that file viewing was ‘slow and non-standardised, and the interface could vary depending on which EASY solutions you were using. Now it is entirely standard, irrespective of which client you happen to be using - all file formats are converted on the server.” Tony Cheung then gave a detailed preview of what users could expect from EASY Documents 5.0, significantly enhanced to take advantage of the wide range of devices now in use across most businesses. The HTML5 web client has been redesigned to make the most of wide screen devices and touch screen technology, and is flexible enough to alter the screen layout depending on the ‘real estate’ available. The new version offers much higher levels of usability, with highly responsive design as well as tablet compatibility. The search function is also much improved and far more intuitive and simple to use, including automated suggestions of search terms as the user types - again, ‘keeping up with market expectations’. As ever, EASY took the opportunity to expose their partner attendees to some of the novel thinking coming out of their channel - a demo by Fujitsu's Pawan Harish of the portable IX1100 scanner showed just how simple it is these days to achieve total mobility, as it was used to send scanned business card images - wirelessly and with no need for a connected PC at all - to a neighbouring tablet device. This theme was picked up by Spigraph's Cheryl Barker, who expanded on the market opportunities for mobile and distributed capture, and again it was clear that many of her points were inspiring the partners present to go back to their companies with some innovative ideas.

BRANDED FOR LIFE
The day's official content was finished off with a marketing-related presentation from Howard Frear and Carina Birt of Sarum, who have been successfully supporting EASY in their UK growth for many years now. They set out some clear marketing objectives including 'extending the brand' via e-shots, the recent website re-launch (which now includes an ingenious ROI calculator) and the increasingly popular DM Collaborators blog. Birt explained that the company now has renowned industry figures coming to them to request a chance to feature on the blog - and it is this commitment to 'compelling content' that is making it such a must-read. Indeed this magazine's editor has been known to contribute a few thoughts from time to time himself, which is even more reason to seek it out if you are not already a regular reader.

The day itself ended as previous ones have, with some highly enjoyable socialising in the midst of the Zoo, and a guided tour of the exhibits. Sadly, the lion enclosure at London Zoo is currently undergoing renovations and those animals are being kept in luxury at the sister zoo at Whipsnade - which meant no-one present could make the inevitable 'Lion's SharePoint' joke. More info: www.easysoftware.co.uk
PRODUCT FOCUS

OPEX FALCON

It's been a couple of years since Document Manager last looked at an OPEX product, and it's fair to say that, while at first glance the devices don't seem to have changed much (large, high speed, high volume), the Lancs-based company's business most definitely has advanced hugely. They've moved from 'new kids on the block' to a well-established and easily understood proposition that is finding considerable traction in their target markets of service providers and BPOs, as well as councils, legal firms and other organisations with large and/or complex mailroom requirements.

OPEX is shipping these devices to users almost as quickly as they can produce them at the moment, and it is not hard to see why users are replacing (or supplementing) some major scanner manufacturers within BPOs and the like. The Falcon is effectively the 'next generation' of OPEX device, its hardware offering significant improvements over previous models (less moving parts than its predecessor 6100, for instance, makes for improved productivity and less downtime).

The company states that the Falcon can allow operators to prep and scan documents as much as three times faster than most prep-only processes - and this is where the real measurable benefit of the OPEX solution comes into its own. As other scanner manufacturers are increasingly recognising, the labour involved in document prep is often the bottleneck in the capture process, so anything that reduces that must help with the overall workflow.

As with all OPEX devices, the Falcon's document handling is second-to-none: the conveyor can hold over 700 pages at a time, handling anything from single sheets to multiple stacks of mixed document types. From business cards and receipts through cheques to long medical documents, Falcon offers uninterrupted processing of whatever is thrown at it. It includes an ingenious 'multi-slot ID assist' feature (working very much like a contactless payment reader) which allows the operator to tweak settings on the fly for handling exceptions with minimum disruption to the flow of documents.

Falcon comes with OPEX's own CertainScan software platform, designed to maximise the features of the hardware and again help reduce the prep burden. Virtual Separators, batch manipulation and QC, on-the-fly image manipulation and editing combine with highly flexible output options including TIF, PDF, XML and more.

Reporting and management of the process is of course especially crucial to BPOs and service providers, and the Falcon offers productivity statistics in real time to allow senior managers to see at a glance which workstations are more or less productive, and why.

The Falcon is available in three configurations: Standard, RED and Transportable. The Transportable variant, as the name suggests, offers legal departments and the like a simple 'roll it in and roll it out' option for one-off projects, while the RED (Rapid Extraction Desk) adds envelope opening and extraction technology at the start of the process, ideal for demanding digital mailroom operations.

More info: www.opex.com

VERDICT

The Falcon’s rapid ROI is certain to appeal to mailroom environments, NHS Trusts and the like, and the sheer versatility and flexibility is already winning them a lot of friends in the BPO/service provider sector. It is a more than worthy addition to OPEX’s existing product line.
ibml SoftTrac® Synergetics, an intelligent document recognition software solution that classifies documents and extracts metadata automatically is now also offered on a license subscription basis, making ‘Automated Indexing’ even more accessible.

To date SoftTrac Synergetics has only been offered as a CapEx purchase, extending the subscription option provides use via an OpEx budget also, which should benefit those with shorter term project requirements or budget restrictions.

Already SoftTrac Synergetics is one of the most cost-effective IDR capable capture platforms on the market, offered with a perpetual use license ensuring no volume limitations, without any additional seat costs and without any click charges.

Many organisations incur high costs by manually identifying document types and entering index data by keystroke. Much of this operational cost can be reduced by using SoftTrac Synergetics to automate this process.

SoftTrac Synergetics is not just designed to process scanned images, but it will also handle multi-channel input streams such as email attachments, fax and existing image repositories.

SoftTrac Synergetics improves business outcomes in document-intensive applications to help users:

- Repurpose headcount
- Eliminate the need for separator sheets
- Accelerate document preparation
- Speed processing turnaround
- Achieve more accurate results that are consistent and auditable
- Track performance from capture to export

SoftTrac Synergetics stands out by offering:

- CapEx and OpEx usage models
- Perpetual volume throughput
- No click charges
- Fully inclusive feature set
- Classification (key word / image), OCR, ICR, Barcode capable
- Easy train / easy use
- No seat costs or instance limitations
- Flexible user setup and maintenance (Thin Client)
- Multi-channel capture
- Supports multiple vendors
- Searchable PDF as standard

If you would like to see more of SoftTrac Synergetics, via a WebEx demo or an evaluation for example, or just get better feel for the license options available, then contact ibml at euromarketing@ibml.com.
United Bankshares, Inc. (UBSI) is a US$12.1 billion regional banking company with dual headquarters in Charleston, West Virginia and Washington, DC. The bank’s lending portfolio tops US$6 billion. With 131 full service offices in West Virginia, Virginia, Maryland, Ohio, Pennsylvania and Washington, D.C. originating commercial and consumer loans, UBSI was challenged to find the best way to capture and centrally store loan documentation files.

Since 2012, UBSI had centrally scanned all of its commercial and consumer loan documents using a low-speed desktop scanning solution originally implemented by a bank that UBSI acquired. UBSI’s low-speed scanning solution presented several problems:

- **Poor image quality**: UBSI had to manually manipulate the settings on its old scanners to ensure optimum image quality for each document type it processed, including insurance certificates, titles, appraisals, and computer-generated forms. Manually manipulating the scanner settings for different types of documents resulted in inconsistent image quality.

- **Slow scanner throughput**: Stopping the scanning process to manually manipulate scanner settings took a lot of time. Making matters worse, the bank’s old scanners were not built to handle a wide range of inter-mixed document types, resulting in frequent jams. The poor performance of the bank’s old scanners required UBSI to rescan up to 20 percent of its work.

- **Time-consuming document preparation**: UBSI’s old desktop scanning solution required the bank to physically sort each document type and manually generate a ‘slip sheet’ for each document to facilitate loading into the back-end system. When you consider that a single commercial loan file can encompass 1,000 pages, it’s easy to see how much time and money the bank spent sorting documents and generating single-use slip sheets.

Backed by support from senior management, in 2013 UBSI began evaluating alternative image capture solutions. Later that year, UBSI selected a scanning and document capture solution that included ibml’s ImageTracDS 1085 high-production desktop scanner and ibml’s SoftTrac Capture Suite software, including ibml’s new SoftTrac Synergetics intelligent capture solution for classifying documents and automatically extracting metadata.

**NOT JUST HARDWARE**

ibml stood apart for its ability to deliver a complete solution. Steve Stone, Executive Vice President of Operations for UBSI said, “ibml has a reputation as being experts in image capture and hard copy paper conversion. What we didn’t know is that they had invested in software and recognition technology. That was a revelation for us. They are more than a hardware company.” ibml’s expertise was critical to the success of the project. “We knew what we wanted to do, but we didn’t know how to do it,” Stone continued. “ibml brought expertise to the table to help us accomplish our objectives.”

UBSI began implementing the ibml scanning and document capture platform in January 2014. The regional bank currently uses the ibml platform to process paper documents for 15 loan types,

**Loan star**

Intelligent scanning technologies have helped a US bank to massively improve its loan processing and information management
"IBML HAS A REPUTATION AS BEING EXPERTS IN IMAGE CAPTURE AND HARD COPY PAPER CONVERSION. WHAT WE DIDN'T KNOW IS THAT THEY HAD INVESTED IN SOFTWARE AND RECOGNITION TECHNOLOGY. THAT WAS A REVELATION FOR US. THEY ARE MORE THAN A HARDWARE COMPANY. WE KNEW WHAT WE WANTED TO DO, BUT WE DIDN'T KNOW HOW TO DO IT - IBML BROUGHT EXPERTISE TO THE TABLE TO HELP US ACCOMPLISH OUR OBJECTIVES."

including car loans and commercial loans. The size of the loan package varies from 10 pages to a thousand or more, depending on the loan type. UBSI fully converted to the ibml solution in June 2014.

CASHING IN
ibml's scanning and document capture platform has provided UBSI with a range of benefits:

- **15 percent reduction in staff:** UBSI achieved its anticipated productivity improvements within six months of implementing the ibml solution. For instance, UBSI's old scanning solution required an FTE to do nothing but scan consumer loan documents for 9 hours each business day. With the ibml solution, it takes the same individual approximately 3 hours to scan all of the bank's consumer, as well as commercial, loan documents.

- **80 percent faster image capture cycle times:** ibml's ImageTracDS 1085 scanner and SoftTrac Capture Suite software delivers superior image quality regardless of the document type, eliminating the need for UBSI to manipulate scanner settings.

- **15 percent reduction in staff:** UBSI achieved its anticipated productivity improvements within six months of implementing the ibml solution. For instance, UBSI's old scanning solution required an FTE to do nothing but scan consumer loan documents for 9 hours each business day. With the ibml solution, it takes the same individual approximately 3 hours to scan all of the bank's consumer, as well as commercial, loan documents.

- **Improved data capture:** Compared to UBSI's old system, ibml's Synergetics captures much more information from each loan file, including the dollar amount, date, address, and other relevant descriptors. The bank uses this information to index the files, providing easier access to stored documents and data. "The data was always there; but ibml makes it easier to capture and use for our downstream business needs," Stone said, noting that the additional information could prove invaluable when examiners review the bank's loan portfolio.

- **Reduced paper storage:** Lacking confidence in the image quality, completeness and accessibility provided by its old scanning solution, UBSI retained virtually all the paper documents that were imaged on its old system to ensure that a usable record could be retrieved. "It was the worst of both worlds," Stone recalled. Now with ibml's imaging system, UBSI has the confidence to destroy most paper loan documents 60 days after they have been processed. This frees up space in UBSI's banking offices where files were previously stored.

- **Less wasted paper:** The ibml scanning and document capture platform eliminates the need for UBSI to physically sort document types and create a single-use slip sheet for every document. On average, the ibml system requires only two slip sheets for an entire lending file.

- **Improved morale:** "The ibml scanning and document capture solution changed the nature of our loan processing jobs from heads-down clerical positions with repetitive tasks to heads-up information management/knowledge worker positions," Stone said. "Staff are now focused on value-added functions such as document inspection and quality control."

- **Foundation for future initiatives:** While lending remains a largely paper-based function today, ibml's Synergetics platform creates a foundation for future automation. "SoftTrac Synergetics will allow us to process paper and electronic documents from multiple channels. We are now looking at technology to create commercial loan documents electronically and have them electronically signed to reduce the amount of documents we have to print, scan, index and upload."

UBSI expects to achieve payback on its ibml platform in 2½ to 3 years. The project was "self-funding," a key consideration with capital so tight for bank automation projects.

"ibml's scanning and document capture platform has enabled UBSI to reduce its labour costs, streamline operations, accelerate the posting of image items, and ensure that highly usable, high quality images are readily accessible to lenders," Stone said. "Impressively, ibml helped us improve the efficiency for both our commercial and consumer loans, which have very different workflows."

More info: www.ibml.com
Names in the frames

With our highest ever numbers of nominations and votes, this year's DM Awards looks set to be yet another record-breaker. As this issue goes to print, final voting is about to close. See below for the full list of finalists - and we hope to see you on October 22nd at London's prestigious Hotel Russell.
### HARDWARE PRODUCT OF THE YEAR
- **Brother UK Ltd** ADS-2600W
- **Canon** DR-F120
- **Epson** WorkForce DS-520
- **Fujitsu** N7100
- **Genus** InoTec - SCAMAX 8x1
- **ibml** ImageTrac6000 series
- **Xerox Scanners** DocuMate 5445i
- **OPEX** Falcon
- **Kodak Alaris** iX20 Series
- **Panasonic** KV-S5076C

### IMAGING PRODUCT OF THE YEAR: DESKTOP/PORTABLE/OTHER
- **Brother UK Ltd** ADS-2100We
- **Canon** P-215 II
- **Epson** WorkForce DS-520
- **Fujitsu** ScanSnap iX500
- **Genus** Avision - AV50F
- **Gradient ECM** GScan & GScan Mobile
- **HP** M522dn
- **ibml** ImageTracDS 1085
- **KnowledgeLake** KnowledgeLake Connect
- **Kodak Alaris** Kodak i4200 (i2x00 series)
- **OPEX** Falcon
- **Panasonic** KV-S1057CU
- **Xerox Scanners** DocuMate 3120

### IMAGING PRODUCT OF THE YEAR: WORKGROUP
- **Brother UK Ltd** ADS-2600We
- **Canon** DR-C240
- **CCube Solutions** CCube EDMS
- **Epson** WorkForce DS-860
- **Fujitsu** fi-7160
- **KnowledgeLake** KnowledgeLake Imaging
- **Kodak Alaris** Kodak i2620
- **Office Gemini** Dokmee DMS
- **Xerox Scanners** DocuMate 5445i

### IMAGING PRODUCT OF THE YEAR: HIGH VOLUME
- **Brother UK Ltd** ADS-2100We
- **Canon** DR-G1100
- **Epson** WF-R8590DTWF
- **Fujitsu** fi-6400
- **Genus** InoTec - SCAMAX 8x1
- **ibml** ImageTrac 6000 series
- **KnowledgeLake** KnowledgeLake Imaging
- **Kodak Alaris** i4600 series
- **Office Gemini** Dokmee Capture
- **Panasonic** KV-S4085CW
- **Xerox Scanners** DocuMate 4799 Dokmee Bundle

### CMS PRODUCT OF THE YEAR: SME
- **CCube Solutions** CCube EDM
- **ABBYY** FlexiCapture
- **CumulusPro** Scan+ ProcessLite
- **KnowledgeLake** KnowledgeLake Capture
- **Perceptive Software** Perceptive Content
- **Office Gemini** Dokmee
- **Generis** CARA
- **Xerox Scanners** Docushare

### CMS PRODUCT OF THE YEAR: ENTERPRISE
- **ABBYY** FlexiCapture
- **Generis Corp** CARA
- **Genus** Hyperwave
- **KnowledgeLake** KnowledgeLake Imaging
- **Perceptive Software** Perceptive Evolution
- **Office Gemini** Dokmee DMS
- **Xerox Scanners** Docushare
- **Objective Corporation** Objective ECM

### ACCOUNTS PAYABLE/INVOICING PRODUCT OF THE YEAR
- **ABBYY** FlexiCapture
- **Bottomline Technologies** Transform Accounts Payable
- **Canon/I.R.I.S.** Canon/I.R.I.S. Solution Package
- **CumulusPro** CumulusPro Invoice+
- **Esker** Esker’s Accounts Payable Automation
- **Gradient ECM** GScan & GScan Online
- **ITESOFT** FreeMind For Invoices
- **Kofax** Kofax Image Processing
- **Office Gemini** Dokmee Mobile DMS & Scanning
- **V1** V1 Capture
- **Xerox Scanners** DocuMate 3120

### COMPLIANCE PRODUCT OF THE YEAR
- **Avena Environmental Ltd** Securall System
- **Canon** DR-C225W
- **Ccube Solutions** CCube EDRM
- **EASY Software** Easy Archive
- **Generis Corp** CARA
- **GFI Software** GFI Archiver
- **ITESOFT** FreeMind For Invoices
- **KnowledgeLake** KnowledgeLake Imaging
- **KOFAX** Kofax Capture
- **M-Files Corporation** M-Files QMS
- **Objective Corporation** Objective ECM and Objective Connect
- **Office Gemini** Dokmee Mobile DMS & Scanning
- **RecordLion** RecordLion Records Manager
- **Xerox Scanners** DocuMate 5445i
DATA CAPTURE/RECOGNITION PRODUCT OF THE YEAR
- ABBYY FineReader
- Adlib Software Adlib PDF Enterprise
- Bottomline Technologies Transform
- Canon DR-C225W
- Canon UK Ltd. IRISXtract for Documents
- CCube Solutions V4
- EASY Software Easy Capture Plus
- Ephesoft Ephesoft
- Esker Esker on Demand
- Gradient ECM GScan & GScan Online
- KnowledgeLake KnowledgeLake Capture
- Kodak Alaris Kodak Info Insight
- Kofax TotalAgility
- Nuance Autostore
- Office Gemini Dokmee Capture
- Perceptive Software Intelligent Data Capture
- ReadSoft ReadSoft Online

EMAIL PRODUCT OF THE YEAR
- Bottomline Technologies Transform
- GFI Software GFI MailArchiver
- Kodak Alaris Kodak Info Insight Platform
- M-Files Corporation M-Files DMS
- GIACOM Messegstream
- Epson WorkForce DS-520
- d-flo Limited TravelComms
- Canon UK Ltd. Canon/I.R.I.S. XMailFetcher

MOBILE CAPTURE PRODUCT OF THE YEAR
- Brother UK Ltd. DS-820W
- Canon UK Ltd. Capture on Touch Mobile
- CumulusPro Mobile Document Capture
- Fujitsu ScanSnap iX100
- Gradient ECM GScan Mobile
- ITESOFYozz Enterprise
- KnowledgeLake KnowledgeLake Capture
- Kodak Alaris i940
- Office Gemini Dokmee mobile DMS & scanning
- OPEX Falcon
- Xerox DocuMate 3115

RECORDS MANAGEMENT PRODUCT OF THE YEAR
- CCube Solutions CCube EDRM
- Bottomline Technologies Transform
- RecordLion RecordLion Records Manager
- Kodak Alaris Kodak Info Input
- KnowledgeLake KnowledgeLake Records Manager
- Generis CARA
- Canon UK Ltd. IRISXtract for Documents
- Objective Corporation Objective ECM
EVENT: DM AWARDS 2015

WORKFLOW/BPM PRODUCT OF THE YEAR
Bizflow
CCube Solutions
CumulusPro
Easy Software
Generis
ITESOFT
KnowledgeLake
Kodak Alaris
Kofax
Objective Corporation
Xerox

BPO/OUTSOURCING/BUREAU BUSINESS OF THE YEAR
Cleardata UK Ltd
EDM Group
Navitas
PHS Data Solutions
Restore Document Management
Storetec Services Limited
Xerox Scanners

DATA DESTRUCTION & SHREDDING COMPANY OF THE YEAR
Avena Environmental Ltd
Capital Capture
Iron Mountain
Kefron Digital
PHS Datashred
Printwaste Recycling & Shredding
Restore Shred and IT Disposal
Shredall
Xerox Scanners

COMPANY AWARDS

CHANNEL PARTNER OF THE YEAR
Bottomline Technologies
Canon
DTS
Easy Software
Fujitsu
KnowledgeLake
Lane Business Systems
Midwich
Northamber
Office Gemini
Spigraph Network

SERVICE & SUPPORT COMPANY OF THE YEAR
CCube Solutions
DTS (part of Spigraph International)
EDM Group
Epson
KnowledgeLake
Kodak Service & Support
Margolis
Navitas
Office Gemini
Paralogic Service Solutions
ReadSoft UK
Restore Document Management
RICOH
Scansation Support
Siemens
Storetec Services Limited
Xerox Scanners

COMPANY OF THE YEAR
Avena Environmental Ltd
Bottomline Technologies
Brother UK Ltd
Canon
CCube Solutions
CumulusPro
EDM Group
Epson
Fujitsu
Generis
Gradient ECM
ITESOFT
KnowledgeLake
Kodak Alaris
Lexmark
Midwich Ltd
Office Gemini
Panasonic
PHS Data Solutions
Restore Document Management
RICOH
Scansation Ltd
Spigraph Network
Storetec Services Limited
Xerox Scanners

More info: www.dmawards.com
Digital first

In the second part of his article on changing working practices (see our previous issue for part one), David Wilkinson of Storetec explains how greater collaboration and new technologies will inevitably alter how we do business.

Smart collaboration has two key features - it is extremely simplified and underpinned by connectivity. This is a ‘liberating’ way to work and the antithesis of it, which is commonplace, sees organisations returning to complex, fragmented, hierarchical and siloed approaches. These are labour-intensive, costly and time-consuming, but, burdened by heavy workloads, it is often the case that nobody has time to look for solutions.

Yet, if they step outside for one moment and take stock of what it is they are doing, they can see that subtle changes and investments can have a discernable impact, as Cisco found in its 2013 Collaboration Work Practice Study: “During the course of our study we found that employees definitely understand the value of collaboration - it provides diversity of thoughts, creates stronger relationships, and provides validation for business decisions. Our research found that through collaboration, employees have learned new skills, been more productive, and built networks of colleagues.” Once you make that connection, there is no looking back.

BEING MORE COLLABORATIVE

Collaboration used to be ‘locked into the real world’. It was characterised by a predetermined location, time and agenda, with participants usually gathered in one or two rooms. The technology on offer was a paper flipchart and markers, and/or a whiteboard and pens.

Fast-forward to today and collaboration is far more virtual, making it more than compatible with a flexible way of working. At any given point, an organisation can have employees working from the office, at home, on the move or in a cafe in a different country. They still need to engage with one another and while, in the past, they would all have had to assemble at a fixed point, thanks to changing attitudes and the development of technology, they now can do that remotely.

As Jeff Schick, general manager of Enterprise Social Solutions at IBM, noted in a piece for Forbes in 2014: “The goal is deceptively simple. Create a smarter workforce through collaboration. Use the rapid advancements in cloud, analytics and social technologies to connect in new
ways. Build competitive agility into the organisation through the cloud so employees, partners, and customers can engage, collaborate and innovate.”

**BETTER TEAMWORK ANYWHERE**

Collaboration has never been more important than it is today. Gone are the days of single-desk, single task, single i.e. individual - ways of working, as well as the inflexible need for workers to be physically present. In its place is a more open sensibility. People and processes have, in light of this change, been freed from their unnecessary constraints and empowered to do their work in any manner that deliver results. We may well be more dispersed than ever before, but we've never been closer and, in turn, smarter at delivering on our goals.

Resultingly, collaboration has been enriched by a shift in workplace culture and the adoption of tools and approaches that encourage employees to work more closely and regularly with all stakeholders, without the need to show up at a certain time and location.

When you think of the 21st century, chances are you'll think of something digital - it's certainly the spirit of the age, impacting on all areas of life. Within the first decade of the new millennium, the pace of change, technologically speaking, seemed to have increased exponentially. Fifteen years later, the world is a remarkably different place. Probes can land on moving comets; 3D printers are providing ordinary people with the ability to make more or less anything; and smartphones have become an all-purpose tool from which you can do just about anything.

As a result, entire industries have been turned inside out, with long-established ideas unable to exist against a radically different backdrop. The music industry is a good example of how technology has disrupted the status quo, demanding its leaders to adapt and progress their operations to stay competitive, if not survive.

**NOT SO SUDDEN IMPACT**

For many organisations, the effects of the digital revolution have not been felt that acutely. While it has asked other enterprises serious questions about the way they do things, it hasn't demanded that all make far-reaching changes to their business models.

However, new technologies are slowly but surely changing this - they are creating the conditions in which if you don't 'get with the programme', it's not so much that it spells the end of your organisation, more that you get left behind.

Consider the typical organisation that is dependent on paper and non-electronic workflows. Everything seems to be working well to a common goal but without context, an audit of how efficient and effective your approach is, you can't really gauge the positives and the negatives.

Yet, an assessment will reveal some shockers. Sticking with the paper example, a standard office relying heavily on conventional workflows risks being inundated with paper - on desks, in meeting rooms and in filing cabinets. It's lethargic, repetitive and visually. Financially, it's very simple - the more paper you have, the more you'll spend. Whether it's the cost of ink or the cost of time spent filing and finding documents, paper en masse is a lavish and unnecessary expenditure.

On the other hand, in a paperless or paper-lite environment, where all documents have been digitised and relocated to a secure and accessible online space, where now empty filing cabinets have gone to a secondhand store and where desks have been decluttered, the benefits are almost immediate.

Employees can continue to work flexibly - they can access documents remotely - space taken up by paper can be better used, and all stakeholders feel better off. Work is more rapid, requests more responsive and solutions more immediate. Technology not only makes that happen, it also, through ‘rapid iteration’, continues improving things. Positive change and development is ongoing.

**REINVENTING BUSINESS**

All of this underpins a ‘digital first’ way of working. Making this your default is still not an obligation but, the more interconnected we become - with the maturation of the Internet of Things - the greater the shift from it being an option to it being a necessity.

On their own, flexible working, greater collaboration and new technologies will deliver seismic changes to how organisations think about work. As a whole, they offer enterprises an opportunity to bring about groundbreaking developments that will fundamentally reshape their entire business model, which, in some cases, will reinvent their entire base of operation. The core product/service and ethos will still be intact, but modified, upgraded and refreshed.

Getting here will be difficult. While many organisations, such as Google, Facebook and Netflix (note all principally tech-focused) have fully embraced non-prescriptive, open and dynamic working practices, many enterprises, big and small, are still stuck in the past, too busy to take stock of the mechanisms propping up their businesses or still cautious about investing in something that will have a huge impact.

It'll certainly be chaotic, tumultuous and divisive, but that is inevitable. Once the dust settles, and everyone gets into the rhythm of a forward thinking, agile and tech-savvy way of working, which gives them greater control over their work, it'll be like nothing they have experienced before. For employees, the power of how, where and when they work is devolved to them. For employers, this trust pays off in retention, innovation, more sustainable profits and a business model that responds to the ever changing world around them. That's smart thinking; that's smart working.

More info: [www.storetec.net](http://www.storetec.net)
**YOOZ ENTERPRISE**

TESOFT has already built a decent customer base for its hosted invoice processing system, Yooz Enterprise, with over 1000 customers in the company’s native France since its launch over 4 years ago. The ‘Invoicing-as-a-Service’ product has been actively marketed in the UK just in the last few months, but is already attracting attention from potential users looking for a cost-effective way to manage their A/P function, especially - but certainly not limited to - those businesses with distributed/remote offices.

Yooz Enterprise automates the entire P2P process with a layer of sophistication and process intelligence rarely seen in comparable solutions. Incoming invoices are handled slickly and quickly no matter their origin: via scanners (including wi-fi), the system’s own web-based scanning interface, email capture, document import, or even - as is increasingly demanded by users - mobile capture from smartphones and tablet devices.

The system is able to automatically detect whether a new invoice has a matching Purchase Order number in the system, as well as checking for duplicates. An agent within the software manages database lookups, matching and upload. Error processing is comprehensive and intuitive, as is the entire interface from the user’s point of view, irrespective of the device being used to access the system.

Search is particularly impressive, with a full-text capability that will be instantly familiar (and user-friendly) for anyone familiar with how Google operates. This ‘Google-esque’ approach also extends to structured metadata search capabilities.

Configuration and setup is simplicity itself, even for relatively non-technical users. The entire process is Wizard-driven and highly intuitive, in line with the overall approach of the solution. It is straightforward for users to define their own workflows for each step of the A/P process from entry through approval and payment, with sophisticated options for routing of exceptions and the like. Approval is a simple process for the relevant staff member, whether single or multiple invoices are on their to-do list - and it can even be done in seconds on a mobile device. This option in itself could be a huge time saver for organisations with approving staff who operate remotely or spend a lot of time on the road.

ITESOFT claims that typical users will have the system set up and working within around 2.5 days on average, compared with an average of 25-30 days for a similar in-house system to be implemented - and even that assumes a ‘smooth’ setup, which we all know is rarer than hen’s teeth. On top of this, a third-party plug-in offers a simple but powerful dashboard interface for users and management. This gives comprehensive and meaningful reporting on the overall system, individual users/teams/locations etc., helping to identify potential bottlenecks and other issues before they impact on the efficiency of the function.

With its easy setup and simple cost model (effectively only charging for what is being used) Yooz Enterprise offers a reduced risk approach to Accounts Payable automation that could mean significant cost reductions - Itesoft themselves claim potential cost savings of up to 70%.

More info: www.itesoft.com

**VERDICT**

Remarkably simple and intuitive to configure and to use, Yooz Enterprise is nonetheless a hugely feature-rich Purchase-to-Pay automation solution for organisations in need of a powerful yet cost-effective SaaS approach.
Convert.
Turn your paper documents into a digital archive.

Storetec make it quicker and easier to access, manage, protect and share the data in your paper archives.

We can digitise, catalogue and index any document from anywhere in the world.
And we give you instant, 24/7 access through our online, cloud-based hosting system.
So you can leave everything to us and get on with what matters most to you.

Our services include:
- Document Scanning
- Microfilm Scanning
- Microfiche Scanning
- Document Storage
- Records Management
- Scan on Demand
- Digital Mailroom
- Invoice Capture
- Online Document Hosting

Discover the easy, hassle-free way to protect sensitive information like yours.
Call 0800 612 4065
or email support@storetec.net

www.storetec.net
London, Manchester, Birmingham, Newcastle and Hull.

STORETEC
Your documents. Managed.
Keeping the score

The New York Philharmonic is digitising 175 years of archives - including 8 million pages of documents and nearly 10,000 hours of audio-visual content - and making it all freely available online.

Founded in 1842, the New York Philharmonic is the oldest symphony orchestra in the United States and the third oldest in the world. As such, the Philharmonic Archives is one of the oldest and most important orchestral research collections in the world. It traces the entire history of the Philharmonic and its more than 15,000 performances around the world and is an important record of cultural history in New York City and beyond.

In September 2009, the New York Philharmonic received a US$2.4 million grant from the Leon Levy Foundation to digitise 1.3 million pages of material from its archives, making them available to scholars, musicians, students, and the general public over the Internet. The Archives’ collections contain material that dates back to the Philharmonic’s first concert in 1842, but the first phase of the digitisation project focuses on the Philharmonic’s International Era, 1943 to 1970. This included digitising 1,300 scores marked by Leonard Bernstein and Andre Kostelanetz, 3,200 programs, 8,000 folders of business records, 4,200 glass lantern slides, 8,500 photographs, and 72 scrapbooks of fragile press clippings.

The Philharmonic is one of the first institutional repositories to embark on a digitisation project of this size and scope with the intent of making all digitised material available worldwide. In order to complete the project, it needed a highly scalable document management system that could handle heavy daily use while continuously streaming large volumes of data. The solution needed to be cost effective, handle large files and have strong digital asset management capabilities. The organisation focused on open source technology as it is easily scalable, reliable and cost effective. In addition, open source claims to offer more flexibility to create a solution that is sustainable over the long term and can be easily shared with other institutions.

WORKING IN CONCERT
The Philharmonic researched open source enterprise content management products
"The Philharmonic uses clustered Windows servers so that the image conversion and ingestion process can be scaled to meet even the most demanding schedule. Each day, some 120,000 JPEG images are ingested and up to 75,000 are deleted to make way for corrected replacement images. At the same time, the front-end site must maintain speedy content delivery for public use as well as internal content proofing. This level of demand requires a highly scalable system such as Alfresco in order to maintain accurate indexes while providing fast content retrieval and modification."

The Philharmonic uses Alfresco Enterprise and Fedora Commons, an open source digital repository framework commonly used for academic digital libraries. The team selected Alfresco because it offers a commercial product backed by support services, can easily scale for high volumes of content, supports any file type and has a robust developer community. In addition, Alfresco could serve as a content platform for the Philharmonic's born-digital archives and be customised to meet the organisation's specific needs into the future.

To help implement Alfresco and streamline the content ingestion process, the Philharmonic turned to Alfresco Partner, Technology Services Group (TSG). TSG's OpenMigrate software controls the flow of all metadata and images into and out of the Alfresco repository, allowing the Philharmonic to perform bulk metadata imports, image ingestion, and Web-enabling assets by indexing content in the front-end Solr search application. Content rendering is performed prior to ingestion using a standalone implementation of ImageMagick, an open source software suite that converts the original JPEG images into web-optimised derivative files of various sizes.

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The asset viewer utilised for the final presentation of digitised assets is the open source GNU BookReader, started by the Internet Archive and now hosted on Open Library (openlibrary.org). The viewer allows users to pan, zoom, rotate, magnify, view thumbnails, and virtually turn pages. The painstaking detail in the Philharmonic's photography methods and quality control workflows allows end users to see more and do more with the digital asset than they ever could with the physical item on a table in the reading room.

**STORY SO FAR**

The New York Philharmonic Digital Archives will soon contain over 1.3 million pages of material from The International Era, 1943 to 1970. Alfresco serves as the content platform for the project and will hold 10 million nodes comprising 5 TB of data by close of the current phase. Digital Archives is freely accessible worldwide and provides comprehensive search interface with easy-to-use document viewer. In its first four months, the Digital Archives received 47,800 visits, 34,000 of those unique. 5,264 visitors returned to the site nine or more times, and 885 of those returned 100 or more times. Leonard Bernstein’s Mahler Ninth score had been viewed nearly 25,000 times. The project has been covered in The New York Times, The Wall Street Journal, and other local, national, and international media outlets.

"The New York Philharmonic digitised the Archives for two reasons: to make material broadly and freely available, and to have a copy for preservation," said Mitch Brodsky, digital archives manager at the New York Philharmonic. "Alfresco is the backbone of our digitisation platform, organising and managing the Philharmonic’s collection of nearly 175 years of cultural, political, and social history. The Leon Levy Digital Archives project would not be where it is today if not for the smart content management solutions that Alfresco offers."

**ENCORE!**

The Philharmonic has upgraded to Alfresco 3.4.1 and is continuing to digitise and ingest content into Alfresco. Over the next 10 years, the Philharmonic plans to digitise its entire collection of 8 million pages of documents and almost 10,000 hours of audio-visual material, reflecting the Philharmonic’s continued commitment to providing the broadest possible access to its collections. When finished, the repository is expected to contain more than 2 petabytes of data and 175 years of archival information available for instant retrieval. The Philharmonic plans to develop partnerships with academic institutions and music conservatories to create curriculum that will focus on material broadly and freely available, and also for preservation. The Leon Levy Digital Archives project would not be where it is today if not for the smart content management solutions that Alfresco offers.

More info: www.alfresco.com
The Xerox DocuMate 4799 is a powerful scanner designed for demanding environments. Xerox describes the 4799 as ‘a powerful scanner for demanding environments’, and they are as good as their word. The company is expanding its product line in a logical manner and this workhorse device will doubtless prove popular with buyers in mid-volume production environments.

The DocuMate 4799 from Xerox Scanners is an A3 duplex scanner that can compete comfortably with some of the industry’s better established ‘heavy duty’ devices. It has a daily duty cycle of up to 40,000 documents, and will scan at 112ppm (or 224 images per minute) at 300 dpi. Document handling is impressive and designed to minimise interruptions for scan operators, as the 4799 features not one but three separate highly advanced sensor systems: ultra-sonic double feed detection, stapled document detection, and what Xerox call ‘Intelligent Feed Control’. Dual image sensors mean that the 4799 offers true simultaneous scanning of both sides of a document.

Like most Xerox Scanners offerings, the 4799 comes with Visioneer OneTouch, allowing users a direct and simple way to send scans direct to email, MS Office applications, email, or to file. The OneTouch interface can be accessed either by simply pressing the single Scan button on the device, or from the OneTouch button panel on the user’s PC screen. Accessing the software via the PC screen gives the user the option to right-click to see the properties of a particular destination, or to modify the settings of the scanner itself.

The 4799 also includes Kofax VRS as standard, to guarantee users the best possible quality of image from their scan, no matter what the original documents might look like. Images are automatically adjusted during the scan process to optimise brightness and contrast as well as the clarity and skew/alignment of the scanned image, making for consistent output, irrespective of the volumes going through the machine. For users not sending their scans directly into a DM/OCR system, the 4799 also includes Nuance’s OmniPage Pro and PDF Converter Pro in its bundled software.

The ADF can handle up to 350 documents of mixed size, shape and thickness without breaking a sweat. The tray height can be easily adjusted via the clamshell design makes for easy operator access to the interior mechanisms for cleaning and maintenance. There is an option for straight through scanning for longer and irregular documents that won’t easily sit in the output hopper - up to a maximum length of around 100 inches. Purchase options include pre- and post-imprinting for those users that require it.

Overall the DocuMate 4799 is a serious piece of kit for serious users: large and robust, but still managing to be fast and intelligent - as well as very well specified in terms of bundled software. Its sophisticated document handling technologies give it an edge in environments that demand a scanner that can handle anything that might be thrown at it.

More info: www.xeroxscanners.com

VERDICT

Xerox describes the 4799 as ‘a powerful scanner for demanding environments', and they are as good as their word. The company is expanding its product line in a logical manner and this workhorse device will doubtless prove popular with buyers in mid-volume production environments.
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David Tyler: There has been much discussion around 'Where is the value-add going to come from in future for imaging resellers and service companies?', and in fact AIIM dedicated a webinar to the topic recently. I think our readers would be interested in your thoughts, especially given the number of large mergers and acquisitions in the last couple of years.

John Mancini: The value-add for imaging resellers and service companies will frankly be with those that don’t think of themselves as 'imaging' resellers. The days of a technology focused sale are over. The value-add lies in solution providers who are experts in finance and accounting processes. Or contracts administration. Or human resources administration. Or compliance requirements in a particular industry. Or... well, you get the idea.

The value for users lies in what Document Management can get you, not what it is. And in mature technology spaces, the key critical competency is domain competency, either in the horizontal processes that run through every organisation or in industry-specific processes. That’s where the value-add lies - and that requires focus and discipline.

DT: I wonder too to what extent you agree with Howard Frear’s (of EASY Software) recent piece in Document Manager, 'No time to relax'? It argued that, despite the Accounts function seeing DM as almost a commodity service now, there is still a very large part of any business that ‘doesn’t get’ DM at all - is anything actually changing? And is it maybe changing slower than we in the industry would like to admit?

JM: I agree totally that there is a huge part of any business that just doesn’t get Document Management. That ties again back to the point that no one ever woke up in the morning, slapped themselves on the forehead, and said, 'Gosh, I need some Document Management today'. Changing this is occurring more slowly than we would care to admit. And that’s because selling a mature technology requires not only technical competency. It requires domain/process competency, and that is a much rarer commodity. Document technologies have only just come into the affordability range for small and mid-sized companies. These technologies used to be too expensive for all but the largest organisations. That’s changed now. The technologies are affordable, mature and have a proven ROI. But they need to be sold in the context of processes, not technologies.
"THE POINT MORE THAN EVER BEFORE IS THIS: START WITH PROCESSES. UNDERSTAND THOSE PROCESSES AND HOW THEY WORK. GET EDUCATED ABOUT HOW CONTENT TECHNOLOGIES CAN REVOLUTIONISE THOSE PROCESSES. DON'T EVEN THINK ABOUT SORTING THROUGH WHERE YOU BELONG ON THE VENDOR LANDSCAPE UNTIL YOU UNDERSTAND THIS. THAT SAID - DON'T EVEN CONSIDER A SOLUTION THAT DOES NOT HAVE MOBILE AND CLOUD FUNCTIONALITY, EVEN IF YOU DON'T NEED IT RIGHT NOW."

DT: We've also talked before about how mobile and social are 'pushing forward' demand from end users for more 'user-friendly' technologies/interfaces - how do you think the DM industry is reacting to this pressure?

JM: The good news is that there are now many, many flavours and price points for content management functionality. The bad news is that there are now many, many flavours and price points for content management functionality.

The landscape is pretty complicated right now. There are 'big process flows' content vendors. 'File cabinet in the sky' content vendors. 'Start with your multi-function device' content vendors. 'Just do it in your cloud application' content vendors. 'Double down on SharePoint' content vendors. Meat and potatoes traditional ECM vendors. And so on.

The point more than ever before is this: Start with processes. Understand those processes and how they work. Get educated about how content technologies can revolutionise those processes. Don't even think about sorting through where you belong on the vendor landscape until you understand this. That said - don't even consider a solution that does not have mobile and cloud functionality, even if you don't need it right now.

DT: On the subject of Content Analytics, it seems as though we're almost at the point of saying 'this is a whole new job role that all businesses will need to consider for the future'; where will this kind of specialist come from? Will it be a records management person, a business analyst, a metadata specialist? And how can a business make sure that this role aligns to the business objectives?

JM: The opportunities created by content analytics highlight the need for a variety of skill sets. On the one hand, organisations need people who understand the data side of the house - in large organisations, these are likely data scientists. These are people who understand these technologies and how they work. The explosion of demand for data scientists is usually where most articles go when they talk about the impact of big data. My colleague Doug Miles has described these people as those with 'their eye on the data and their ear to the business.' But that's only part of the puzzle. We usually think that if data scientists are the 'yin' of the big data/analytics equations, then data entrepreneurs are a necessary 'yang.' These are people who understand business processes and what kinds of questions we should be asking of our data and content repositories - people with their eye on the business and their ear to the data. Big data and content analytics initiatives are ultimately not about the technology, and not even about how we use data to test business hypotheses, although that is a good place to start. The most far reaching big data and content analytics initiatives are using these competencies to change the very nature of the questions that are asked in the business.

More info: www.aiim.org.uk
CASE STUDY: TOTEMIC

Oriiginating as independent financial advisers, the Totemic Group became the largest commercial debt management company in the UK. Totemic develops its own payment, information and CRM systems, and - through its key PayPlan business - helps over 100,000 people in financial difficulty manage debts every year. Totemic also scores consistently highly in 'Best Places to Work' listings and is an 'Investor In People' accreditation holder.

LEVERAGING AUTOMATION

For its core PayPlan business, Totemic Central Services Ltd (TCS) receives 800-900 pieces of mail correspondence on the quieter days of the week, and 1400-1500 on the busier. The correspondence broadly falls into approximately 12 main types (creditor letters, statements etc.) though when sub-categorised for the purposes of actioning, the number is closer to 25. These types of mail have to be opened, sorted, scanned, processed and actioned every day. Backlogs weren't common, but an ever-present risk. As existing users of Kofax for scanning purposes, Totemic wished to expand that infrastructure and leverage it further to implement a creditor/client correspondence processing system.

The main challenge was to automate as far as possible the process of matching each incoming document to clients and credit agreements, whilst easily and dynamically adjust routing of extracted data to a variety of back-office processes. DCS worked closely with Totemic for a significant period of detailed process analysis, during which particular attention was paid to the varying availability (and accuracy) of data on any given incoming document.

All significant system elements were already in place (scanners, Kofax Capture/KTM /VRS platform etc) so this project would focus on configuring the Kofax platform and developing custom elements in order to fulfil the specific business logic. The required workflow logic was plotted, allowing for both automated and manually guided lookups from CRM in order to arrive at the closest possible data matches for each incoming
CASE STUDY: TOTEMIC

The upgraded solution now searches for information to populate a multitude of principal data fields and verifies the relationships of this data matched with previously stored case/matter correspondence. This has to take into account:

- 140,000 debtors
- 60,000 creditors
- Multiple 'debt accounts' per debtor (from 1.75 million UK debt accounts)
- Erroneous information on the correspondence

Given the vast number of variables and their permutations, one major consideration was user experience. The operating validators now work with uncluttered, user-friendly functions and presentation in order to maximise the benefits of automation. This was accomplished by providing carefully summarised and prioritised information and ready access to interrelated data lookups.

LEARNING ON THE JOB

In order to populate the overall document status, the solution also searches for phrases likely to identify the document as an 'accepted payment offer', for example, or an 'account statement'. A system dictionary manages this and dynamically learns in response to manual input to the correspondence it cannot identify straightaway.

Front-end operators scan sorted categories of correspondence in batches, using separator sheets where necessary (e.g. multipage documents). Back-end validators use the KTM Server to check and correct where necessary, in accordance with the workflow described earlier.

This means that while Totemic’s front-end post sorting is in fact a slightly more ‘involved’ process for the operators concerned, the pay-off arrives at the back-end: once scanned the correspondence takes mere seconds to validate and is automatically passed through to the correct client files, and made immediately available for action/response.

CORRESPONDING BENEFITS

- All incoming correspondence dealt with each day. Backlog risk reduced
- No longer necessary to offshore proportions of the processing
- Estimated project cost recoup within 11 months
- Overall reduction in man-hour and financial costs per client case, as the operational cost of administering cases is significantly reduced
- Post-scanning, documents validated at rate of 2 per minute by operators

The opportunity for rapid responses to correspondence has been strengthened, leading to faster overall pursuit of creditor/debt cases. Totemic are considering widening the remit of Kofax-led document processing solutions to leverage further benefits.

"The Debt Management correspondence system is in live and highly productive use. Its implementation has further increased PayPlan’s position as a market leader in the debt management arena,” concluded Simon Linforth, Head of Totemic Central Services Ltd. “Debt management has recently become an FCA regulated industry bringing with it increased challenges. The Kofax software has ensured PayPlan remain at the forefront and focused on their compliance responsibilities to the customers, business partners and industry as a whole. Thanks to the DCS team for their time, skills and patience with our exacting demands. We look forward to working with DCS on the next project!"

More info: www.dcs.co.uk

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How will you read your data in 100 years?

...or even 200 years? Nik Stanbridge, VP Marketing, Arkivum, examines some of the issues of true long term archival and retrieval

What if digital preservation was as simple as writing your digital data ('born digital' or digitised - it doesn't really matter) to a very special storage medium? So special that once you'd written your data to it, you could forget about it for hundreds of years?

How special would it have to be? Would you go for it? What criteria would it have to satisfy to seduce you?

EASY AND INEXPENSIVE TO READ

A recent article by Chris Erickson, Digital Preservation Manager at Brigham Young University Library in the US, makes the case for a medium (called M-Disc) that has (very) long-term permanence and that will be "relatively easy and inexpensive to read" far in the future even if the original writing/reading technology is no longer available. 100-200 years is their goal.

I think however that Chris is conflating two issues relating to deep archival storage. One is the assertion that the 'marks' on the medium are relatively easy and inexpensive to read, and the other is that the technology to do so is widely available (today) and that "adoption is a powerful predictor of relative permanence of readability." I think this is missing the point. A permanent medium that allows us to store and forget cannot have a 'and hope for the best' element to it based on the fact that the technology is widely adopted and popular (and that, therefore, it will be easy to read the data back in hundreds of years).

There is no history of a digital medium being easy to read long after the technology that wrote it is no longer available (digital tech is simply too young). And because there's no history of this happening, I doubt anyone would be willing to take the risk of 'storing and forgetting' with this one. And there is another big issue here as well - that of which data file format to use when writing in 'store and forget' mode.

HUMAN READABLE?

When you burn data to that optical M-Disc so that you can forget it for hundreds of years, what file format are you going to burn it with? One of the big challenges of digital preservation is not only being able to read the actual bits as they were stored, but also to have a mechanism (software) to open and read the file itself. There are organisations (Archivematica for example) whose sole aim is addressing this specific issue (file format preservation).

Digital preservation is obviously a complex topic and there are many facets to it. What I'm saying here is that we mustn't forget how we're going to read those perfectly preserved, permanent bits on that piece of storage media 200 years from now.

For a medium to actually be 'store and forget," I believe it has to have human readability along with its permanence (a very difficult combination I believe). The digital age continues to present challenges in this area.

More info: www.arkivum.com
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