Clearing the way:
Forestry Commission automates invoicing

Managing change:
How DM technologies can help

Outsourcing DM:
A smart move?

Scanning strategies:
Standardising on a single platform

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Welcome to our last edition of 2015, an issue that covers topics as diverse as outsourcing, change management and business strategies - all, of course, within the context of document and content management. I believe this reflects the wider use and acceptance of such technologies in the broader business environment: where once (not that long ago!) document capture was a mundane and hidden process, taking place in a basement room well out of the way of the ‘real’ business, these days we have increasingly IT-aware C-level executives. Such people have a far greater understanding of the crucial importance of information and records management, as well as the ability of technologies such as ours to invigorate and refresh organisations in search of improved agility and responsiveness. As the concept of DM moves out of the mailroom and into the boardroom, it becomes central to many wider IT strategic conversations around storage, cloud, mobile and all of the big issues of any business.

Of particular interest in this issue is Howard Frear’s take on the outsourcing of DM/ECM functions; his perhaps surprising contention is that in most instances, using a third party for such services is the optimum choice. The arguments in favour, says Howard, are manifold and well known to most of us: economies of scale, convenience, and cost savings, just for starters. But at the same time there are often very good reasons not to outsource, including data regulations that are yet to come into force. If you do consider it, though, it is still not something to be taken lightly - done badly, it is all too easy for an organisation to simply end up outsourcing a problem to a supplier, rather than using the outsource process to remove the problem entirely. As Howard says: “The lesson is to take outsourcing very seriously indeed, but that if you go down this route, whatever fashionable business thinking tells you, it’s a serious and potentially risky commitment that you need to manage very, very carefully.”

Elsewhere in this issue you will find a full and exhaustive list of all the winners and runners-up from the DM Awards, which took place at the end of October at London’s ritzy Hotel Russell (you can tell it’s posh because it doesn’t like being called the Russell Hotel!). Once again we broke all records for numbers of nominations and votes cast, and we are in fact getting close to the point where the event will be too big for the function room that has housed us for the last nine years. It is a fittingly positive note on which to end the year, and to look forward to an even more successful 2016 - and we wish the same of course to all our readers.

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Galway Clinic empowers patients with EHR

Galway Clinic is undergoing an ambitious project to become the first hospital in Ireland to enable patients access to their Electronic Health Record (EHR) by November 2016. To achieve this, the clinic has installed MEDITECH’s latest EHR platform, MEDITECH 6.1, and is using BridgeHead Software’s RAPid Data Protection suite to ensure that the MEDITECH system, as well as the rest of the hospital’s data, is fully protected and recoverable in the event of a system outage, data corruption, loss, or major disaster.

“At Galway we pride ourselves in leading the way with healthcare technology,” said Raphael Jaffrezic, CIO at Galway Clinic. “It’s important to us that we empower our patients to take control of their own care and to become an active player in their own treatment.”

As part of the project, Galway needed to ensure they employed a fully comprehensive data and system protection environment to safeguard the MEDITECH application as well as other data from across the healthcare enterprise. Galway selected BridgeHead Software’s RAPid Data Protection, with the additional MEDITECH components, to create reliable, recent copies of all patient information that can be easily brought back into live production quickly and predictably, should it be required. “BridgeHead was the natural choice for us when it came to backing up our entire data estate. They have a high level of integration expertise when it comes to the MEDITECH platform and they also provide us with great support to give us peace of mind that data from across the entire organisation, including all patient information, is always safe and instantly accessible should an outage ever occur,” concludes Mr. Jaffrezic. http://bit.ly/1LsJgLu

HPE to transform cheque clearing for RBS

Hewlett Packard Enterprise (HPE) has been selected by RBS to digitally transform the company’s cheque clearing service through implementation of a new image-based solution. The new digital service is being implemented as part of a wider change to the banking industry whereby all cheques must be processed digitally by 2017, following the introduction of HM Treasury’s Future Clearing Model which is viewed as the biggest change to cheque clearing in a generation. Working closely with RBS, HPE will deliver a stable, secure and future-proofed digitised cheque clearing service which will centre on the creation of the new image-based solution. The service will also safely comply with the regulatory changes currently planned and meet the 2017 implementation timescale, while at the same time ensuring customer service is not impacted.

www.hpe.com/uk

Scan your receipts for free with ScanSnap

Fujitsu has made its ScanSnap Receipt software available in EMEA free of charge for convenient receipt management. Supporting multiple languages and currencies, it converts information like the date of invoice, amount, and tax information from a paper receipt into useful digital data for household books, travel expenses and other personal business.

Existing customers receive ScanSnap Receipt as part of the automated ScanSnap software update as well as via a download link online. “We continually review our full hardware and software offer to bring value to both new and existing customers. Therefore we keep developing and enhancing our ScanSnap software ecosystem. ScanSnap Receipt is an example of this approach in action: an additional software tool for the simple and efficient management of receipts at no extra cost,” said Mike Nelson, VP at Fujitsu subsidiary PFU (EMEA) Ltd.

ScanSnap Receipt is integrated in the Quick Menu of ScanSnap Manager software. It helps users to convert paper receipts into a digital format, to organise and extract information from receipts and to export data to file formats including CSV, PDF, and JPEG for efficient expense tracking and bookkeeping.

www.fujitsu.com/uk

IRIS launches Readiris 15 for Mac

IRIS has released a new version of Readiris for Mac, its flagship OCR solution for Mac OS. Readiris Pro & Corporate 15 for Mac convert scanned documents, images, pictures and PDF files to fully editable smart documents compatible with the most popular text editors available on Mac OS (Word, Excel, PDF, and many other formats). Readiris 15 for Mac is powered by IRIS’ latest OCR engine (DRS 15), that offers state of the art recognition accuracy while optimising the conversion processes for better speed. The new release now handles multi-thread processing to best operate the power of the latest Mac OS computers and accelerate the conversion process. Readiris 15 for Mac features a brand new user interface to provide its users with an easy and intuitive environment, as well as new advanced PDF options.

http://bit.ly/1SyUmyF

IRIS launches Readiris 15 for Mac

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Virtual Cabinet delivers real boost to docs

Lindenhouse Software, developers of the Virtual Cabinet document management system, have introduced a new document creation tool that allows professional firms to drastically reduce the time it takes to produce letters. The boost to efficiency will be significant for accountancy firms that typically generate thousands of letters a year and will reduce administrative input, ensure accuracy and cut the risk of re-typing errors.

The top 50 accountancy firm, Lovewell Blake, has been trialing the new functionality. Shaun Mary, IT partner, Lovewell Blake says: “A major feature for us in Virtual Cabinet is the document creation tool. It is very slick and easy, and crucially it is in a product that all staff are aware of. It just allows us to generate a letter so much quicker.” The firm has found it possible to save four and a half minutes for each tax return letter with a process that unites Virtual Cabinet, the practice management and tax software, so that they work seamlessly together.

Virtual Cabinet produces the template, the practice management software populates it and relevant personalised tax data is sucked in from the tax system. When the time saving of four and a half minutes is multiplied across the firm’s 9000 returns, the savings for this single letter equate to 18 weeks of time. The team has calculated that each letter produced using the document creation facility will save a further 30 seconds to a minute.

www.virtualcabinet.co.uk

M-Files enhances its EIM capabilities

M-Files 2015.1, the latest product release of the M-Files enterprise information management solution, features a variety of important metadata-related enhancements. These include efficient new features for easily configuring the metadata of documents and other objects to include contextual automatic values, intuitive property groupings, helpful tooltips and more. This improves both the efficiency and accuracy of adding and editing metadata, which directly leads to users being able to find the precise content they need faster as well as more effective and consistent business processes.

M-Files 2015.1 also offers major enhancements for managing and streamlining highly complex workflows, including the ability to easily administer parallel approvals and configure advanced business process logic without scripting or coding.

M-Files was recognised by Forrester Research as a Leader in its 2015 ECM Wave Business Content Services report, with Forrester stating that, “M-Files is unique with its strong metadata-centric approach to ECM.” Nucleus Research has also positioned M-Files as a Leader in its 2015 Value Matrix for ECM for the second consecutive year.

www.m-files.com/en

New Xerox solutions for insurance and HR

Xerox has announced a range of solutions to simplify processes within insurance and HR departments. The Workflow Automation Solution for New Business Processing makes the underwriting process easier to navigate by organising all business and customer data in one application, saving employees hours of time each week on tasks like fact-checking existing claims information. It enables customer inquiry calls to be resolved on initial contact, improving customer satisfaction and diverting employee resources to other high-value work.

The Xerox Workflow Automation Solution for Claims Processing integrates with common claims handling systems, such as LifePro and home grown AS400 mainframe systems. This allows companies to store all claims information, like deductibles and HR staff a secure platform to digitally store employee data for instant access. Whether documents are faxed, emailed or scanned, HR personnel can access data quickly. The solution will also flag missing content within each employee file and automatically send requests to retrieve the information.

Finally, the Workflow Automation Solution for Policies and Procedures Administration creates, digitally distributes and tracks employee acknowledgement of company policies.

www.xerox.com

Kodak Alaris finds AI business division

Kodak Alaris has announced the creation of AI Foundry, a business dedicated to helping organisations process and learn from structured and unstructured data through the use of proprietary Artificial Intelligence (AI) technology. The launch of AI Foundry marks the next phase in Kodak Alaris’ evolution as a leading provider of information management solutions, building on the success of its award-winning document scanners and capture software.

AI Foundry’s flagship offering, Info Insight, is designed for businesses across a variety of industries and vertical markets, such as insurance, healthcare, retail, logistics, utilities, and anywhere customers interact electronically with their vendors. The algorithms underpinning the solution rely on linguistics (i.e. semantic understanding) to make sense out of unstructured communications, while learning in real time and “getting smarter” over time. Info Insight also incorporates smart routing to send inquiries and suggested responses to the ‘best person’ considering that person’s skill level, availability, time zone, and even language.

www.aifoundry.com
Clearing the way for invoicing

The Forestry Commission has integrated scanned invoices directly into its financial systems using eCopy.

The Forestry Commission is the largest land manager in Britain and the largest provider of outdoor recreation areas. Their mission is to protect and expand Britain’s forests and woodlands and increase their value to society and the environment. The Commission has 3,000 employees in around 100 locations.

The Commission had engaged in a project to integrate its Oracle-based Cedar eFinancials system with its Serengeti document management system. This would allow an image of all financial documents held in Serengeti to be accessed from within the finance system. This process required that all images in Serengeti were appropriately indexed against the relevant transaction in the financial system through pre-defined metadata. While this was achieved relatively easily for ‘outgoing’ documents, i.e. those created by the finance system, it was not the case for ‘incoming’ documents such as purchase invoices. These needed to be scanned and the appropriate financial transaction reference applied to extract the required metadata.

The scanning of purchase invoices required a significant amount of manual intervention to scan the invoices and identify and extract the metadata. The original process was laborious and error-prone and checking that proper indexation had been applied could only take place after the document was actually uploaded. Furthermore, purchase invoices were still processed manually at up to 100 sites throughout the organisation.

The Commission deployed eCopy ShareScan to its fleet of MFDs. eCopy QuickConnect was used to develop two custom buttons on the eCopy user interface that allow users to quickly Scan to E-mail and Scan to Shared directories. In addition, a custom eCopy Connector was developed that completed the integration between Cedar eFinancials and Serengeti, with the MFD as the integration point. With this Connector, designed specifically to handle purchase invoices, the invoice is automatically scanned and displayed on the screen. The user then enters the unique accounting transaction reference number. The system connects to Cedar eFinancials to retrieve and display appropriate metadata, which the user verifies. Upon verification, the properly annotated document is immediately uploaded to Serengeti and is available for viewing.

INCREASED SIMPLICITY

By using the MFDs as the integration point among eFinancials, Serengeti, and paper-based purchase invoices, the Commission has been able to ensure rapid and accurate filing of incoming financial documents. Previously, users had to look up and enter data when filing documents. Using the new process, they simply view the already available reference number on the scanned invoice image, enter it into a customised field on the MFD screen, and the system does the rest. As a final check, the user verifies that the correct metadata was retrieved from Cedar and applied to the scanned document, and the document is filed in Serengeti. This more efficient process saves significant time and money in the filing process.

"With eCopy-ready MFDs, we have been able to provide a number of general scanning facilities that can be used across our business," commented Steve Atkins, Head of Finance Systems Development at the Commission. "The development of the specific Purchase Invoice connector has not only saved us time and effort but has proved a concept that we plan to adopt elsewhere as part of the rollout of general electronic document management."

With this successful implementation under its belt, it is investigating other paper-based business processes that can benefit from the same concept, including contractual documentation and other areas where paper storage persists. The Forestry Commission has purchased the eCopy SDK to enable them to develop future connectors on their own to further improve productivity and enhance the value of the fleet of MFDs.

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Back in the day, outsourcing your DM involved using third party scanning specialists for documents in bulk, who would have trundled off all your boxes in a big van and reappeared at some indeterminate time to hand you back a bunch of compact discs with some sort of basic search facility.

By contrast, these days outsourced DM has evolved considerably, and is now way more flexible and sophisticated in the way it is able to help you better handle data. In particular, cloud means we can handle much larger volumes, meaning outsourcing of company information can happen a much greater scale, with far more functional and flexible and tailorable service level agreement options. Forget that CD - now, staff can access the corporate memory banks from the other side of the world in an instant from their smartphone.

This is all great and makes outsourcing far more of an attractive option. However, the reality is that even now, outsourcing of DM is not for everyone, or always the right move in every business circumstance.

Let’s review how and why. On the plus side, outsourcing this part of your core business process is convenient and can be bought as a turn-key solution: all the software and hardware are in the cloud ready to run, so all your documents get swiftly indexed, stored and administered by a dedicated team specially trained up for the task. In theory, this should allow your document management infrastructure to be up and running far faster than on-premise solutions, which need to be selected, spec-ed, piloted, deployed, tested, then, of course, maintained. And Internet connection allowing, your team have instant access to all their content and documents anywhere and everywhere, as stated.

You can also realise great economies of scale: your files can be scanned en masse, using high volume, specialist kit provided by your new outsourcing service provider. This is an important advantage, because otherwise you will have to accommodate big capital and staff training costs. What's more, you can take care of all those storerooms and filings cabinets full of paper that clutter up the office and cost valuable desk space.

So if the outsourcer is very selective about what content is stored for real-time or near real-time access, then this arrangement should be a lot more cost effective for you, saving you thousands in...
service costs versus keeping redundant or archival content in an easily accessible state. Indeed, our experience shows you should only need to keep 1-5% of all that filing cabinet information following such a project, which is good news.

OUT OF SIGHT ADMIN
Another feature of a good outsourcing partnership is that a lot of the system admin workload you previously shouldered disappears. That’s truly the best part of any cloud deployment: IT upgrades and back-ups take place invisibly, plus hardware updates and systems technical administration are constantly and competently managed by staff whose sole focus is the system. Again, the pluses are adding up here: the chances of ‘unplanned outages’ - crashes, downtime and lack of system availability - are drastically minimised with a good cloud infrastructure. Never forget that the reputation of an outsourcer is made or ruined on the basis of whether its business continuity works - and if it delivers on its commitment to keeping businesses up and running.

A final point: it’s also in the outsourcer’s interest to find ways to improve the way you work together; it will want to look for ways to deliver information faster and more safely and offer increased business continuity. So these all look like great reasons to outsource your document management requirements.

BE SURE YOUR PARTNER CAN DELIVER
On the other side of the debate, however, let’s consider if there’s a need for caution here. For some organisations the cloud is not possible for compliance or policy reasons, such as government mandates that say that data can’t be held outside of such and such an area and so on. These affect strategic/political, national utilities, defence and healthcare entities and for good reason - such restrictions are all ones that we would sign up to in order to protect critical national infrastructure and citizen safety.

It’s also worth noting that you have to be prepared to go though that rationalising process we mentioned - and if you don’t you may be fooling yourself. You can’t outsource that problem to a third party as they can’t do it on your behalf - they don’t know enough about your business, or have access to what your internal priorities are, what is sensitive, what needs to be kept for the regulator.

The moral of the story is that you have to have your content well-ordered and clean - or be prepared to make it so in order for outsourcing to be a realistic option. But that doesn’t always happen in the real world, and can lead to issues and in the worst case, the breakdown of a customer-outsourcer relationship completely.

Next, your procure-to-pay cycle or order to cash processes may well link to both central and local business apps. That means you need to share the documents that sit behind both ends of that process, or things may get confusing. The reality is that you’re probably going to have a lot more ‘hybrid’ business process deployments as a result, with some elements outsourced, some kept in-house and so on. This is a more complex set-up and requires careful management and the right measures need to be put in place to make things run smoothly.

Finally while an outsourcer offers some economies of scale nonetheless it’s worth noting that not all of them are necessarily well-established, properly resourced, genuinely global players. You need to run due diligence here with any potential supplier, and pay close attention to whether they can process the ‘n million documents overnight’ advertised.

NOT FOR EVERYONE - BUT ALWAYS WORTH CONSIDERING
Summing up, then, outsourcing is a great business tool, but it’s always important to evaluate all the above factors to get the right solution for maximum business advantage.

While many standard business processes - finance, accounts payable, contract management, or HR records management - have become commoditised and are thus eminently suitable for outsourcing via the cloud, the more security conscious may still rest easier considering hybrid deployments until their confidence builds in both the technology and the hosting partner.

The lesson is to take outsourcing very seriously indeed, but that if you go down this route, whatever fashionable business thinking tells you, it’s a serious and potentially risky commitment that you need to manage very, very carefully. There are enormous benefits, and we’re a long way from the van and the CD.

More info: www.easysoftware.co.uk
Papworth Hospital, the largest cardiothoracic centre in the country, has installed CCube Solutions’ EDRM software along with workflow and eForms modules to create an innovative electronic medical records system (eMR) to improve how patient referral paperwork and medical notes are indexed, routed and shared among clinicians and clerical staff.

A tertiary trust with most referrals coming from other hospitals, Papworth is the UK’s largest specialist cardiothoracic hospital and the country’s main heart and lung transplant centre. Employing 1,669 staff, it treats over 23,800 inpatient and day cases each year along with 73,000 outpatients.

Papworth Hospital is being rebuilt at the Cambridge Biomedical Campus, which is also home to Addenbrooke’s and the Rosie hospitals, Cancer Research UK, AstraZeneca, Glaxo Smith Kline and the Medical Research Council (MRC). The campus brings together key NHS hospitals with commercial companies doing innovative medical research and drug development. While many other trusts have digitised patient records, Papworth Hospital has taken an innovative approach to using eMR by concentrating on the patient’s pathway from the moment an individual is referred to the hospital to boost efficiency, reduce costs and enhance patient care.

CUTTING PAPER
Papworth's new state-of-the-art £165 million hospital on the Cambridge Biomedical Campus which will not have a paper records library on site, so addressing how patient notes are managed is of paramount importance. In addition, given most referrals come from other hospitals via letter, a better system to handle this was required.

Using CCube Solutions’ EDRM software at the core, the system comprises a new eReferrals application, an eClinical letter and workflow approval system along with integration with a third party digital dictation solution.

Karen Thompson, Papworth Hospital’s Business Change Project Manager, says, “For the first time, all referrals will be handled electronically. This reduces the time, risk, duplication and costs in circulating paper around the hospital and rationalises an inefficient process.”

CLINICAL EFFICIENCY
All referral letters will now be scanned into the eMR on arrival to make them visible to staff and show where a patient is in the booking and treatment process. Patients can be prioritised according to their needs, with two work streams created simultaneously: an administrative pathway and a clinical pathway. Both work independently of each other.

From an administrative perspective, the health records team can look at the referral on their computers, register a patient if required, check the demographic information and input patient data into the
PAS. The Business Support team can also then check clock start dates and 18-week pathway status.

For clinicians, letters will appear in the eMR system with all supporting notes. Clinicians will then use the system to complete a series of actions; document the treatment they want to do, which clinic should be involved, whether to add a patient to a waiting list or route the individual to another colleague. Secretaries will also have visibility of what is happening so that appointments can be arranged.

The new eReferral application went live late last year in the Cardiology department and will roll out incrementally throughout the hospital. Over 850 staff have been trained and registered to use eMR including around 120 consultants. After consultations, the eClinical letter and workflow approval system enables secretaries and clinicians to draft letters and route these documents around for review, sign-off and ultimately on to GPs.

The hospital is also in the process of designing and implementing eForms to help capture new patient information without relying on paper.

David Wilcox, Papworth's Hospital's business change & IM&T project manager, adds, “The eMR is also the portal access to other hospital applications like the PAS and Pathology solution which means consultants don’t have to change systems. In other words, there is a single sign on which gives staff access to the various databases they need.”

**DICTATING THE PACE**

Papworth has also integrated its new digital dictation system with eMR replacing an old analogue solution. Secretaries can listen and type letters within this which improves the speed of the letter drafting process and allows managers to better organise and route work for staff.

The clinical and operational reasons and benefits for implementing an eMR solution are varied:

1. To support the move to the Cambridge Biomedical Campus given there is no space for records at the new site.
2. To ensure fast access to patient records 24/7. Historically there was a day’s delay with paper records as they had to be recalled. In an emergency, a courier would have to be sent to collect paperwork which was expensive.
3. To support multi-disciplinary team working by allowing secure remote access for clinicians to view records from their offices or homes.
4. To significantly reduce operational costs. Paper notes storage and logistics were costing the Trust around £100,000 per annum not including staff costs. Papworth Hospital estimates that in the last year eMR has saved the Trust 53km of paper from a total output of 1600 km.
5. To enable Papworth to meet the Government target to treat patients within 18 weeks - and know where people are on this timeline - thereby avoiding financial penalties if exceeded.
6. To improve clinical services and efficiency. For example: Papworth provides services to 10 outreach clinics around East Anglia. Services include sleep apnoea care. Currently notes have to be ferried to and from these centres by courier. eMR will in future remove this by allowing clinicians and nurses access to notes thereby saving transport and handling costs.

An additional project is underway looking at all the reasons which could compound a person to stay longer in hospital. The goal is to get people in and out of faster and reduce the surgical length of stay. The new eMR will help reduce the time to process patients.

The Papworth Hospital implementation won Public Sector Project of the Year at the 2014 DM Awards. Vijay Magon, CCube Solutions' managing director, says, "Papworth has addressed the beginning of the patient’s journey within the hospital. It hasn’t worked back like other trusts and focused on scanning legacy records. It is hoping that by greatly reducing the amount of paper produced at the outset, it won't have to do back scanning given the cost and complexity of doing so. This makes a lot of sense as over 70% of new patient information is generated electronically anyhow."
To drive efficiencies in its IT estate after significant budget cuts, Aylesbury Vale District Council (AVDC) appointed Annodata to provide a cloud-based managed print solution. In doing so, the council has shaved £50,000 off of its annual print management costs and helped to safeguard frontline services.

Based in Buckinghamshire, AVDC is one of the largest district councils in the country, providing key services such as recycling, planning and town management for a major housing and employment growth area. Much like all local authorities, AVDC has had to deal with significant funding cuts from central government, having seen its government grant cut by 47 per cent since 2010. To counter these budgetary restrictions, and to prevent negatively impacting the services it provides, AVDC has adopted a cloud-first approach to its IT, moving functions and applications to the cloud wherever possible.

Karen Russell, IT Project Leader at AVDC, explained: "Cloud is a major part of our IT strategy and has a great deal to offer increasingly squeezed public bodies like us. The potential for cost savings is a key driver, but just as important are the flexibility and agility that the delivery model offers. In addition, having a third party manage our IT and infrastructure means that our internal IT staff can focus their efforts on our core business. But security is naturally a concern, particularly for the public sector, so when we came to looking at moving our print estate to the cloud, we wanted to make sure we were in safe hands."

AVDC turned to Annodata who devised a cloud-based print solution that would reduce the number of devices in the print estate, improve security and drive down the council’s carbon footprint. A mobile printing facility was also deployed to allow staff and visitors to send their work to print from any device, in any part of the building. All of the print servers are stored off-site in a secure data centre and are managed remotely by Annodata, relieving the burden of management for AVDC’s in-house team.

"Annodata’s cloud print solution reduced the total number of devices, improved the security and functionality of our network, and drove down our paper usage. Mobile printing proved to be a huge asset, which allows the public to print directly without the intervention of our staff. Despite the added benefits offered by these newly introduced functions, we’re now making a saving of £50,000 a year; money which can go towards servicing the public," Karen concluded.

"Cloud is a major part of our IT strategy and has a great deal to offer increasingly squeezed public bodies like us. The potential for cost savings is a key driver, but just as important are the flexibility and agility that the delivery model offers. In addition, having a third party manage our IT and infrastructure means that our internal IT staff can focus their efforts on our core business."

Annodata CEO, Rod Barthet commented 'We’re delighted to provide AVDC with a solution which not only significantly reduces their overall costs but also improves their operational efficiency with a more flexible and resilient service. We’re seeing more and more organisations, both in the public and private sectors, adopting cloud solutions in this way and reaping the benefits it delivers to their bottom lines, their employees and often their own customers.'

More info: www.annodata.co.uk
Document Management Made Easy

www.dokmee.com
DM Awards 2015: Top cats

London’s Hotel Russell was the prestigious setting for the ninth annual DM Awards, co-hosted by ex-England cricketer Chris Cowdrey and comedian Josh Daniels. As usual the evening included a silent auction on behalf of the Lords Taverners charity, which raised a significant amount of money by selling collectable items from the world of sport and entertainment.

This year’s Editor’s Choice award was presented by David Tyler to OPEX for their Falcon scanning solution, while Company of the Year this year went to Spigraph Network. Xerox Scanners’ DocuMate 4799 (reviewed in our last issue) won the highly coveted Product of the Year award, while Kofax and Fujitsu won in the Software and Hardware Product of the year category, respectively. Overall the ninth DM Awards was agreed by all to have been a roaring success, leaving the organisers the challenge of creating an even bigger splash for next year, and our tenth ceremony! The full list of winners and runners-up is below.

THE WINNERS

Accounts Payable/Invoicing Product of the Year
WINNER: ITESOFT - FreeMind For Invoices  
RUNNER UP: Bottomline Technologies - Transform Accounts Payable EDMS

As the gateway to full AP automation, ITESOFT.FreeMind for Invoices plays a key role, removing the tedious and error-prone tasks of manually keying data into your ERP. It uses advanced proprietary data extraction algorithms to lift data from unstructured documents such as PDF or paper (using document scanners and OCR) and processes xml invoices from EDI sources. ITESOFT.FreeMind for Invoices then performs all mandatory checks - supplier verification, invoice pre-registration, PO matching - with ERP master data to ensure that invoices can be processed further in the AP process. It can integrate with all ERP software and has certified integration with both SAP and ORACLE EBS. This solution accelerates your AP process dramatically and enables you to take your financial department to best-in class status in no-time.
Workflow/BPM Product of the Year

WINNER: EASY Software - EASY Documents

EASY Software is Europe’s foremost provider of ECM solutions. Its award-winning suite of solutions include EASY Contract, EASY Records for HR and EASY Invoice.

EASY Documents - A flexible workflow solution that enables users to quickly access their business processes from anywhere using a highly featured, browser-based client that is as familiar to use as email. Featuring a plug-in to Microsoft Visio the business process configurator makes even complex scenarios simple to deploy and evolve. In-built reporting dashboards and an active audit trail allow key users a completely transparent view of transactions. EASY Documents integrates with key business solutions including: EASY Invoice, EASY Contract and EASY Records for HR, each pre-customised using EASY Software’s extensive customer experience.

Email Product of the Year

WINNER: Canon / I.R.I.S - XMailFetcher

The XMailFetcher fetches emails and attachments (up to 47 different formats) for digital mailroom automation and intelligent document recognition. The XMailFetcher can be integrated with any BPM solution or used as Import-Addon for IRISxtract for Documents. IRISxtract for Documents is a 360° Content to Process platform that captures data from documents (such as invoices or purchase orders) and/or sorts incoming emails, faxes, scans or documents from any digital source by classification & indexation fully automated. It helps users saving money and allows data processing near to real time. With IRISxtract for Documents your data is where it should be: in process!

CMS Product of the Year: Enterprise

WINNER: Objective Corporation - Objective ECM

Objective ECM is a proven global solution that enables our customers to improve their information governance and frontline services through the streamlining and automation of their key document centric business processes. Don’t just take our word for it: "Processes designed by our Tenancy Management teams have now been automated via Objective Workflow. Tasks are now automatically allocated to the appropriate owners for them to action and the system takes care of all of the processing and alerting with the minimum of manual input. I estimate that over 70% of our 'business' is now done through Objective. It's fully transparent, easily manageable and has vastly improved the service we deliver to our customers whilst delivering significant savings for the Council". Richard Parkin, Head of Service for Housing Management, Thurrock Council

CMS Product of the Year: SME

WINNER: CumulusPro - Scan+ProcessLite

CumulusPro’s flagship product, Scan+ProcessLite, was launched in 2013. It is popular with SMEs and winning ground with Enterprise users as a true-blue browser capture application that requires no active or java plugins, no installation and no manual updates (IT departments love it!) Although lightweight, it offers rich document processing features such as scanning (TWAIN), intelligent indexing, data verification and workflow capabilities. It easily integrates with DMS and Workflow applications (cloud and on-premise), managed by a centralized web administration application (the Admin Panel).

The solution can be extended to include Mobile Capture apps and the cloud-based Straatos Document Processing Automation Platform enabling SMEs and Enterprises alike to engage and interact with their customers from anywhere, anytime and from any device.
BPO/Outsourcing/Bureau Business of the Year

WINNER: Storetec Services Limited
RUNNER UP: EDM Group

Storetec has its origins in a drive to innovate and succeed. Founded in April 2003, the company immediately seized upon emerging technologies and its own determination to provide an intuitive, fast and secure managed outsourced document archive solution, utilising the advantage of the emerging web technologies. This catapulted Storetec into a supplier league that does business with some of the largest companies in the world.

Now, with bases in London, Birmingham, Newcastle, Manchester and Hull, the company provides a wide range of tailor-made document scanning and storage solutions, with more than 650 million documents currently being stored electronically on their own online document management system.

Data Destruction & Shredding Company of the Year

WINNER: Printwaste Recycling & Shredding
RUNNER UP: Avena Environmental Ltd

Printwaste Recycling & Shredding is proud to have won Document Manager’s Data Destruction & Shredding Company of the Year Award. We work with over 4000 customers throughout the UK giving a professional cost efficient service to Government & NHS organisations and commercial and industrial businesses. Printwaste’s fleet of mobile shredding vehicles and fully security vetted staff specialise in on-site shredding of confidential documents and sensitive data. We collect and safely destroy and dispose of redundant branded stock or damaged goods. Shredding processes are carried out under the strictest control with auditable reporting achieving near zero-waste sustainable recycling ensuring best value and cost control.

Data Capture/Recognition Product of the Year

WINNER: Kodak Alaris - Kodak Info Insight
RUNNER UP: EASY Software - EASY Capture Plus

AI Foundry, a business unit in Kodak Alaris, helps organisations worldwide to handle and automate the ever increasing influx of unstructured text based communications through all digital channels, as well as paper, automating business processes and enhancing customer experience. AI Foundry’s flagship offering, Info Insight, is ideal for businesses across a variety of industries and vertical markets, such as insurance, healthcare, retail, logistics, utilities, and anywhere customers interact electronically with their vendors.

Our platform uses advanced AI algorithms to classify documents, extract relevant data and automate business processes while providing predictive analytics to the user so that true customer insight is achieved allowing their business to react real time.

More info: www.aifoundry.com

Records Management Product of the Year

WINNER: CCube Solutions - CCube EDRM
RUNNER UP: KnowledgeLake - KnowledgeLake Records Manager

CCube Solutions specialises in providing Electronic Document and Content Management & Workflow solutions, based on the CCube software suite. Systems scale from small departmental applications to large enterprise-wide solutions and include: the CCube Portal, Electronic Forms, Workflow, Content Searching, and CCube Electronic Document & Records Management System (EDRMS), offering specialised solutions, including:

- Legal Compliance
- Health Records Management
- Law Enforcement Applications
- Information Web Portals
- Invoice Capture and Authorisation
- Local Authority Applications
- Human Resource Management
Investment in the Future Award for Training/Education - presented by AIIM
WINNER: Bottomline Technologies

Bottomline's document automation and information management solution, Transform, helps companies streamline the flow of documents and data across their business and externally to customers and vendors. By automating the receipt of invoices and subsequent manual processing, AP departments can easily reduce invoice cycle times and related costs using Transform AP. Users now have the ability to create, share and access business critical documents electronically, enabling companies to minimise their reliance on paper and improve operational efficiencies. Our training and education program sits behind the delivery of Transform products, delivered by the Bottomline Academy, a forum for sharing expert advice, guidance and knowledge, the Academy better enables and supports customers in their quest to streamline processes, improve productivity and apply best practice methodology.

Service/Support Company of the Year
WINNER: DTS (part of Spigraph International)  RUNNER UP: Storetec Services Limited

DTS Service is the leading provider for after sales services in the document capture market in EMEA. In addition to its high quality maintenance service and support products for document scanners and document capture softwarefrom the world’s leading manufacturers, DTS offers consulting, implementation and training for customers in various industry verticals to achieve the highest possible level of process automation with a rapid return on investment. DTS is a business unit of Spigraph Group, headquartered in St-Quentin-Fallavier, France, and with sales and service organisations across 20 countries in Europe, the Middle East and Africa, DTS services more than 100,000 units in over 40 countries. Learn more about the value of document capture for your organisation by contacting us at www.spigraph.com or www.dts-service.com

Compliance Product of the Year
WINNER: EASY Software - EASY Archive  RUNNER UP: Objective Corporation - Objective ECM and Objective Connect

EASY Software is Europe’s foremost provide of ECM solutions. Its award-winning suite of solutions include EASY Contract, EASY Records for HR and EASY Invoice.
EASY ARCHIVE - A highly scalable content repository for secure electronic storage and international compliance, deployed at over 12,000 organisations globally. Very much at the core of EASY Software’s ECM suite, this high volume archive is robustly designed for all content formats contributing to a good information governance strategy for the digital enterprise. Using powerful full-text search and strong version control there are over 100 published integrations to popular ERP and CRM applications including SAP, Microsoft Dynamics and most recently Salesforce, an EASY App on the Salesforce Appstore that enables documents to be seamlessly attached to the CRM record.

Channel Partner of the Year
WINNER: Northamber  RUNNER UP: Midwich

Northamber is the UK’s largest distributor of document scanners and scanning software. Our partnerships include; Brother, Canon, Fujitsu, Iris, Kodak and Kofax. Northamber is the longest established independent trade-only distributor in the UK, founded over 35 years ago with well over a decade of experience in document capture technology. Northamber has a dedicated, specialist team focused on delivering market leading; service, support and logistics to the channel. We also have partnerships with some of the largest independent software vendors in the UK meaning regardless of your requirements, Northamber can help.
Imaging Product of the year: High Volume
WINNER: ibml - ImageTrac 6000 series
RUNNER UP: Fujitsu - fi-6400

The ImageTrac scanner with SoftTrac Scan software processes over 400 pages per minute, performs intelligent document recognition and data capture on the fly during scanning, and sorts documents based on business rules. The ImageTrac reduces document preparation cost by scanning documents of multiple size and thickness in a single pass. Document prep workers have fewer exceptions and steps to contend with when preparing batches for scanning. And with the full SoftTrac Capture Suite of post-scan software modules including Synergetics IDR, the ImageTrac provides a complete, end to end capture solution all the way through to integration with back-end business applications.

Imaging Product of the Year: Desktop/Portable/Other
WINNER: Brother UK Ltd - ADS-2600We
RUNNER UP: Epson - WorkForce DS-520

The ADS-2600We is ideal for anyone looking for a powerful and versatile scanner. Converting paperwork to digital is fast and simple with a speedy 24 pages per minute and an automatic document feed of up to 50 pages. Not fixed to just one location, the ADS-2600We can be shared within an office via a wired/wireless networked or used alongside a computer via a USB connection. With an impressive 9.3cm colour touchscreen LCD users can share scans quickly and easily across network folders, FTP and popular Cloud applications direct from the scanner without the need for a PC.

Imaging Product of the Year: Workgroup
WINNER: Office Gemini - Dokmee DMS
RUNNER UP: Canon - DR-C240

Office Gemini’s suite of software solutions are aimed at the document management and scanning industry. We distribute these solutions through a vast worldwide network of value-added resellers (VARs). Our two premier products, Dokmee DMS and Dokmee Capture, are used by thousands of customers to mass capture and manage their documents, in more than 30 countries and are available in several different languages. Office Gemini supports customers virtually anywhere in several languages. Organisations worldwide across various industries, including financial, legal, healthcare, and education, use Office Gemini solutions to streamline document management and imaging to optimize their business processes as they strive to become paperless.

Mobile Capture Product of the Year
WINNER: Canon UK Ltd - Capture on Touch Mobile
RUNNER UP: Kodak Alaris - i940

Canon imageFORMULA marketing is delighted to accept the Document Manager Award for Mobile Capture Product of the Year 2015 for our product CaptureOnTouch Mobile. CaptureOnTouch Mobile is an easy to use free app that lets you scan from Wi-Fi enabled Canon’s imageFORMULA scanners like the DR-C225W directly to mobile devices (telephones and tablets). Save time with single pass double-sided scanning and create professional scans with auto document size detection, de-skew and blank page deletion. The app can be easily and quickly downloaded from Appstore for iPhone and iPad devices, and from Google Play for Android devices.
Software Product of the Year

WINNER: Kofax - Kofax TotalAgility

Leverage the world’s first unified smart process application development and deployment platform. Smart process applications (SPAs) are a new category of software that provide an essential link between systems of record such as ERP and ECM, and systems of engagement to help improve the way customers interact with an organisation.

Kofax TotalAgility is the world’s first unified smart process application development and deployment platform. TotalAgility provides an essential link between an organisation’s systems of engagement and systems of record to help increase responsiveness to customers, improve service levels and gain competitive advantage in order to better manage and grow businesses while greatly reducing operating costs.

Hardware Product of the Year

WINNER: Fujitsu - N7100

The Fujitsu N7100 Network Scanner lets users across all industries enjoy simple and robust touch-screen scanning while improving business processes. The powerful PaperStream software cleans up even the toughest documents in a single pass, reducing processing times and increasing efficiencies. This eliminates the image processing delays which burden many network scanners on the market. An enhanced CPU and the new GI processor speed up image processing, leading to a near-instant view of captured documents. Bundled with the scanner, the Scanner Central Admin software provides IT departments an efficient way to manage scanner deployments.

Editor’s Choice

WINNER: OPEX - Falcon

The all-new Falcon scanner range combines OPEX’s innovative one-step drop feed process with the performance of a high-capacity production scanner, providing the only universal document capture workstation on the market. Falcon is also the only product specifically designed to attack the most labour intensive part of the capture process, document preparation. Notably there are three versions: Falcon, Falcon Transportable and Falcon RED all offer massive prep reduction, increased security and integrity of the document while offering the ability to collate key management information in the background. Falcon can handle single to multiple mixed sheets, fragile or damaged items, envelopes to receipts. It is literally the complete package.

Project of the Year: Public Sector

WINNER: Fortrus - South Essex Partnership NHS Trust

SEPT had a 5 year plan to join-up information across the Trust, to improve the care provided through the use of technology. By working in partnership with Fortrus, different data streams from multiple systems were augmented into one comprehensive record system including digitised paper files, enabling information to be accessed by a wide variety of users throughout the Trust. The advantage of the user centric approach adopted by Fortrus, where design runs parallel to development ensures that more complex information can be displayed more readily than through any other means. It empowers the user, providing them with access to huge amounts of data, in an intuitive and seamless way. Together we are moving forward to execute a complete, integrated digital care record well ahead of the Government deadlines.
Project of the Year: Private Sector
WINNER: ClearPeople - Shoosmiths

Shoosmiths is a major UK law firm with 10 offices across the UK. With 139 partners and more than 800 lawyers and legal advisers, the law firm were using a Document Management System which was no longer fit for purpose - it was taking lots of time for employees to store, locate, share and collaborate on documents which was impacting on the businesses productivity. As a leading Microsoft UK partner, ClearPeople was selected to implement a best-of-breed DM solution that delivered tight integration with Microsoft Office including document and email management, to improve internal collaboration and efficiency across all of Shoosmiths’ offices. ClearPeople delivered an enhanced knowledge sharing, collaborative platform. Built in SharePoint, it offers the flexibility required to plan for long-term updates to allow their DMS to grow and evolve with their company.

Project of the Year: Gold Award
WINNER: CCube Solutions - Aneurin Bevan University Health Board

Aneurin Bevan University Health Board has installed CCube Solutions' eForms software to create a computer-based system to display children's growth records. 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.

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.

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.

Product of the Year
WINNER: Xerox Scanners - DocuMate 4799

The Xerox DocuMate 4799 is the flagship product of the Xerox Scanners product range, and its versatility, high speed and superior reliability make it a popular scanner for demanding environments. The DocuMate 4799's leap forward in innovation is enhanced by DokMee Capture integration, which adds service bureau capabilities, such as numerous index fields, Q&A and advanced compression, without levying per-page scanning charges or licensing fees.

Company of the Year
WINNER: Spigraph Network

For over 20 years, Spigraph has been delivering industry-leading document capture solutions and best-in-class services to our channel partners, service bureaus, enterprise and public sector clients in the UK & Ireland, Europe, Middle East and Africa. Spigraph helps companies to automate document-centric processes such as invoice processing, mailroom automation, customer on-boarding, mobile and web capture and many more. Our portfolio of hardware and software includes industry leading technology from global partners such as Fujitsu, Kodak, Canon, Kofax, Panasonic, ibml and i2S Digibook. Spigraph serves approximately 6,000 authorised partners and more than 40,000 customers in over 40 countries. Contact your Spigraph representative at sales.uk@spigraph.com
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.
handled with care

Document and records management specialist Wincanton Records Management has been able to add a new weapon to its armoury of services with the OPEX Falcon Transportable scanning workstation.

The award-winning Wincanton Records Management (WRM) has over 20 years’ experience in the delivery of information management services. The company prides itself on helping organisations manage hard copy and digital information - hence the recent installation of two industry leading OPEX Falcon Transportable scanning workstations.

WRM offers a full range of records management and data services including secure document storage, confidential shredding, electronic document management and off-site data protection. WRM’s information management solutions are vast but essentially focused on helping businesses better manage their information: from freeing up valuable space at office locations, to helping organisations comply with regulatory requirements and even improving information management workflows.

Backed by Wincanton Plc., a well-established logistics firm, WRM is able to provide its customers with purpose built facilities that boast the highest standards of security and fire protection. This is teamed with its suite of accreditations including ISO 9001 (Quality Management), ISO27001 (Security and Risk) and BS10008 (Legal Admissibility of Electronic Information). Each of these assets have created a reputation for WRM that is synonymous with service excellence and strong working relationships.

WRM is constantly developing its services in both hard and soft copy information management as well as monitoring and developing customer partnerships. This is evident with the optimisation of its incoming postal processing and scanning via the acquisition of Falcon, the ‘Universal Document Scanning Workstation’ from OPEX. This latest OPEX technology was chosen following WRM’s invitation to all hardware vendors in the market to tender. WRM chose the OPEX technology because of its flexibility and adaptability to customer needs and environments.

**A MOVEABLE FEAST**

Falcon Transportable, designed specifically for mobile scanning operations, combines OPEX’s innovative one-step drop feed scanning technology with the performance of a high-capacity production scanner. Regardless of document scanning needs, Falcon Transportable embraces the most difficult and daunting workflow challenges wherever needed.

Designed for easy manoeuvrability in and out of transport vehicles including minivans, Falcon Transportable can be set up and running within a half hour of arrival. It allows operators to prep and...
scan documents at a faster rate than the
prep process alone of most current
workflows. This significantly reduces
costs associated with preparing
documents for scanning. In addition,
Falcon Transportable offers four versatile
feeder options: drop-feeder, packet
feeder, high-capacity feeder, and a
unique Rescan Feeder.

READY FOR ANYTHING
OPEX Falcon Transportable scans
everything from single sheets in a wide
range of sizes to multiple large stacks of
paper. The Falcon Transportable conveyor
can hold more than 700 pages at any
given time, allowing maximum
throughput and uninterrupted processing.
From thick paper to fragile or damaged
pieces, from envelopes and file folders to
receipts, to small forms and business cards
- nearly any style or type of document can
be scanned! With the optional external
capture device and software, three
dimensional objects can be imaged and
placed directly into the electronic record.
Minimising prep, paper handling, and
other manual tasks not only improves
efficiency, but also results in superior
document integrity. Documents are
handled once and converted to image. As
documents are removed from envelopes
and scanned, the Wincanton operators
can view images in real-time to ensure
proper capture and identification. This
reduces time-consuming and costly
rescans later in the process. An ingenious
camera fitting can capture and import
‘unscannable’ items.

OPEX’s specialised feeder provides a
dynamic process that is proven to reduce
prep and increase scanning accuracy.
Patented drop-feed technology allows for
efficient scanning directly from envelopes,
while intelligent packet sensing
capabilities adjust track speed for optimal
throughput. The high-capacity feeder
handles large stacks of mixed document
types making the need for additional
high-volume production scanners
unnecessary.

The Rescan Feeder is designed for fast
and efficient rescans without disrupting
the overall scanning process. Falcon
Transportable has a customisable work
surface with options to fit varied
footprints and the table provides
adjustable height settings for maximum
operator comfort and comes equipped
with a 22-inch touch-screen monitor for
enhanced viewing of scanned images and
easy one-touch page-type classification.

VERSATILE PLATFORM
OPEX’s feature-rich CertainScan software
is the perfect complement to Falcon
Transportable, providing auto-
classification and the most intuitive way to
visually classify documents as they are
scanned. The versatility of this platform
allows users to maximise the many
features of their OPEX scanner and
minimise the preparation of documents
prior to scanning.

Geoff de Metz of Wincanton Records
Management is delighted with this
merging of best practice with OPEX as he
observes ‘We pride ourselves on
embracing a size of customer especially in
sectors such as financial, legal and the
NHS where careful secure compliance and
total control of the document life cycle are
paramount. Trust is the key word all round. The consultation and installation process
with OPEX was very efficient and attentive and has greatly enhanced our service offering’.

More info: www.opex.com
OPINION: CHANGE MANAGEMENT

BUSINESSES NEED TO BE ABLE TO INNOVATE RAPIDLY AND CONTINUOUSLY IMPLEMENT IMPROVEMENTS. THEY NEED TO SEEK OUT ANY ADVANCEMENT THAT LETS THEM WORK SMARTER, MOVE FASTER, AND ULTIMATELY TAKE ADVANTAGE OF EVERY OPPORTUNITY BEFORE THE COMPETITION BEATS THEM TO IT. TO THIS END, DATA SHARING AND COLLABORATION INCREASINGLY DETERMINE JUST HOW FAST AN ORGANISATION CAN MOVE.

CHANGE HAS BECOME A CONSTANT FORCE, BUT CHANGE HAS ALWAYS BEEN PROFOUNDLY DIFFICULT. HUMAN NATURE STRONGLY RESISTS CHANGE AND THE SAME HOLDS TRUE FOR BUSINESS. FOR ORGANISATIONS, MORE CHANGE CAN EQUATE TO MORE RISKS AND MORE POTENTIAL FOR BUSINESS DISRUPTIONS IF IT IS NOT MANAGED EFFECTIVELY.

START AT THE TOP
Take time to examine the current change management programmes and evaluate them in terms of their ability to promote agile, smart evolutions in the work place. A cross-functional team can be tasked with the evaluation. The questions to be asked and answered should start at the top, and then span all of the teams that implement change management. The box-out (Figure 1, opposite) summarises the key questions that need to be addressed as part of any effective change management programme evaluation.

SPOTTING SIGNS OF WEAKNESS
During the review of current change management practices, be especially attentive to any potential red flags. These can include productivity issues - any process that is taking up a lot of time for employees, managers, or both. Errors that impact the quality of products or services should also be highlighted and quantitatively evaluated.

ALIGNING DOCUMENT AND CHANGE MANAGEMENT
Equipped with a solid understanding of the current strengths and weaknesses of change management, it is time to consider new strategies and tools. Many organisations today, for example, are making major shifts in their document management software (DMS) systems as a way to boost agility.

The latest generation of DMS solutions can directly improve change management in a variety of ways. By introducing more advanced document control, an organisation changes the way that digital information assets are viewed, managed and reported upon.

Improved visibility and management of documents is particularly beneficial for change management. Everyone can work from a single source of truth, with up-to-

DM helps ring the changes

The goal remains the same, but the change management game has evolved, argues Chris Davidson, Marketing Manager at M-Files. It’s less about planning for future changes and all about becoming more agile in order to effectively handle constant change.
"IMPROVED VISIBILITY AND MANAGEMENT OF DOCUMENTS IS PARTICULARLY BENEFICIAL FOR CHANGE MANAGEMENT. EVERYONE CAN WORK FROM A SINGLE SOURCE OF TRUTH, WITH UP-TO-DATE FACTS AND DETAILS. A MODERN DMS SOLUTION ALSO EQUIPS EMPLOYEES WITH FASTER ACCESS TO ALL INFORMATION. SINCE PERFORMANCE POSITIVELY IMPACTS THEIR EVERYDAY TASKS, EMPLOYEES BECOME PROPONENTS OF THE NEW PLATFORM AND THE ASSOCIATED CHANGES, WHICH IN TURN HELPS DRIVE USER ADOPTION - AGILITY IS DEVELOPED FROM THE GROUND UP."

Individual contributors waste less time looking for the right information, and teams can collaborate more effectively when working from consistent, accurate information. Moving forward, businesses can also build on a solid DMS foundation to introduce more automated change management. Previously email-centric review and approval cycles can be replaced with automated workflows that push documents and related content to the right people at the right time.

Security controls and access permissions can also be easily controlled and automated with a document management system. For example, permissions can be set so that only reviewers can make changes once a document reaches a certain state. So the game is changing, but with the necessary commitment to change management, agile businesses can quickly pivot to meet ever-changing market conditions.

More info: www.m-files.com

FIGURE 1: THE BIG QUESTIONS

The following questions must be addressed as part of any effective change management programme evaluation:

- Is there a high-level (i.e. executive-level) commitment to change management?
- Does change management align with the top-priority goals of the organisation?
- Do employees and IT have the appropriate tools for managing change?
- How is progress tracked and evaluated?
- Are change management processes dependent on manual oversight?
- What systems, tools and technologies enable change management workflows?
- What are the bottlenecks in the workflows, and are these bottlenecks encouraging unsanctioned process deviations that expose the company to risks?

DATE FACTS AND DETAILS. A MODERN DMS SOLUTION ALSO EQUIPS EMPLOYEES WITH FASTER ACCESS TO ALL INFORMATION. SINCE PERFORMANCE POSITIVELY IMPACTS THEIR EVERYDAY TASKS, EMPLOYEES BECOME PROPONENTS OF THE NEW PLATFORM AND THE ASSOCIATED CHANGES, WHICH IN TURN HELPS DRIVE USER ADOPTION - AGILITY IS DEVELOPED FROM THE GROUND UP."
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 (socialise, play video games, read a book, pay bills and so on).

As a result of the digital revolution, 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 adapt and progress their operations to stay competitive, if not survive.

GETTING WITH THE PROGRAMME
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. You have to keep abreast of the latest happenings and reconcile your business to break new ground, expand and diversify revenue streams and be part of the pack that sets the barometer of best practice within your sector.

This is smart working, or, as others like Accenture say, intelligent: 'Intelligent processes create a virtuous cycle of constant improvement fed by continuous feedback,' the global management consulting, technology services and outsourcing company stated in its paper Fast and Furious: How Digital Technologies are Changing the Way we Work.

THE PAPER EXAMPLE
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 unsightly. Financially, it's very simple - the more paper you have, the more you'll spend.

Forward thinking works
David Wilkinson, Sales Director, Storetec Services Ltd offers a view of the work place in a changing world
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. It’s not smart and it’s highly unproductive.

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, where ‘the post’ is replaced by digital mailing, 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 - creative areas, breakout rooms - 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.

DIGITAL FIRST
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. There’s logic to it. Already much of what is done today is digital, more so perhaps in people’s personal lives. Movies are watched via the web, groceries are ordered on a smartphone, photographs are enjoyed on a tablet. Food is ordered through an app, local services engaged with on the web and ideas shared on social networks. This becomes default. In the world of work, this digital first approach is inevitable.

THREE STEPS TO SMARTER WORKING
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 that they are 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’s inevitable and immediate. 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
CASE STUDY: FARRER & CO

Business as usual

Lawyers Farrer & Co improve collaboration and efficiency using a cloud-based DM solution and Kodak Alaris scanners

Independent law firm Farrer & Co has installed a cloud-based Software as a Service EDMS from NetDocuments along with high volume Kodak i3000 Series Scanners and Kodak Capture Pro Software, provided by partner, ITEC. Founded in 1701, Farrer & Co has a rich 300-year plus history advising clients on legal matters with the business today split into four practice areas: private client, contentious, property, and commercial. The company has offices in Lincoln’s Inn Fields and employs over 400 staff.

Neil Davison, Farrer & Co’s IT Director, says, “Law firms are document heavy and traditionally produce vast amounts of paper which has to be retained for a significant number of years, depending on the specific records management policy. With the growth in email usage, our paper storage has been growing year on year which is cumbersome to manage.”

Farrer & Co has used MFPs for a long time for scanning but required equipment to complement this which could handle the much greater volumes expected as it scans inbound paperwork about legal matters to populate NetDocuments - bundles which can run into several hundred pages each. The purchase of two Kodak i3450 Scanners does this perfectly as each are rated to process up to 20,000 documents per day - 90 pages per minute - and come with Perfect Page technology to guarantee image quality even when dealing with old and faded paper.

Davison says, ”Having something which is reliable, doesn’t jam, can cope with all paper formats and won’t damage valuable documents some of which are decades and even centuries old is crucial. The quality of the Kodak Alaris equipment stood out to us straight away.”

The scanners are managed and operated by a third party managed service provider, Intelligent Office, as part of an outsourced facilities and office services contract. An initial pilot project was carried out in the HR department to review how high volume scanning would work. All personnel paperwork was scanned over a 10 week period given the structure of each is similar to legal files. All HR files are now totally digitised. The success of this meant that the roll-out was broadened to all Farrer & Co’s legal teams.

Now, one year after NetDocuments was installed, the project has been declared a success. In contrast to the old EDMS which presented documents as long lists, NetDocuments has an attractive GUI, is therefore very visual and allows information to be found within a few clicks.

Furthermore, using a true SaaS cloud-based solution saves Farrer & Co money on IT infrastructure costs as well removing the necessity to manage a complex on-premise IT environment - freeing staff to focus on work considered more strategic. The shift from paper to digital is also allowing Farrer & Co to look at the volume of paper held on floors, as well as reducing the external offsite storage used.

Simon Pring, a partner and member of the management board at Farrer & Co commented, “Such is the importance of a document management system, a project like this could have meant significant disruption if solicitors couldn’t access or send documents to clients. I’m just so pleased that the move to NetDocuments and the other IT related work streams went so well, and it was business as normal.”

More info: www.kodakalaris.com
BRINGING DIGITISATION TO THE NATIONAL HEALTH SERVICE

From small beginnings in 1954 we have become one of the largest UK-owned full lifecycle document management businesses. We have based our success with the national health sector on a robust set of values and on a truly nationwide reach of facilities and services.

Our expert, professional customer service, willingness and capacity to adapt and flex our business systems, and a strong spirit of innovation mean we are already working with over a quarter of all NHS trusts. The majority of our work with them is in long-term, high-volume digitisation projects.

Restore customers can count on an unbroken chain of custody; daily scan capacity in the millions; the latest high-volume, high-quality equipment, and skilled, helpful staff at all our specialist facilities across the UK.

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 read outs, 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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Time to change platform?
Standardising on one platform for scanning and capture can reduce operational costs and improve enterprise agility, argues ibml's Ashley Keil

Operating on a fragmented scanning and document capture infrastructure is a stark reality for many enterprises today. Often companies have legacy scanning and document capture solutions due to the purchase of point solutions by departments or business units, a failure to consolidate systems after mergers and acquisitions, or the deployment of systems to address a single document input channel. But, as document and data volumes explode and document input channels multiply, businesses need a standardised scanning and document capture infrastructure that is cost-effective and flexible.

Failing to optimise scanning and document capture infrastructure hampers business operations by creating manual processes, obstructing information tracking and reporting, complicating security and auditing, requiring the purchase of new software and hardware as business requirements change, and potentially jeopardising the business case for scanning and document capture technology.

However, running a mix of solutions acquired on a piecemeal basis is expensive and complex to manage. It may lack basic essential capabilities such as centralised administration. It can increase maintenance costs and require operators to have a strong knowledge of many systems. Organisations shouldn't attempt a wholesale replacement of their legacy scanning and document capture systems, much less the deployment of an enterprise-wide platform all at once. Overly ambitious enterprise deployments are likely to get bogged down, delaying a return on investment and potentially resulting in second-guessing among senior managers whose support is required for a project to move forward. Deploying an enterprise platform all at once also may result in excess scanning capacity before organisations have completed their migration to the system.

A better approach to deploying an enterprise-wide platform is to think big, but start small.

1. Select a scanning and document capture platform that meets current and long-term needs.
2. Scale and deploy the solution to meet the requirements of a department or application.
3. Once the platform has demonstrated payback in its initial deployment, extend the platform to meet the requirements of another department or application.

The key to success is ensuring that the organisation chooses a platform that meets both its current and long-term needs, while being able to cost-effectively scale to meet these requirements.

INHERENT COMPLEXITY
Running a mix of point solutions acquired on a piecemeal basis presents
a number of downsides:

- **Poorly scaled hardware**: A multiple system environment where software runs on dedicated hardware leads to excess capacity and wasted capital investments. Organisations must “rip and replace” hardware when their volumes or processing requirements change.

- **Poor user experience**: In a mixed systems environment, staff must be trained on multiple point solutions, rather than a single platform. Staff also must sign into multiple systems to perform daily functions, such as retrieving images and data. Similarly, a multi-system environment makes it virtually impossible to centrally administer and manage operations. It is also difficult, and sometimes impossible, to share images and data across disparate platforms. Even in cases where content can be shared, the cost of integration is very high. Upgrades to any one system may have the domino effect of requiring costly and time-consuming changes to the integration layer.

- **No support for multiple input channels**: Most point solutions are designed for a single document input channel, requiring organisations to deploy multiple systems.

- **Lack of visibility**: It is difficult to get timely insights when information resides in multiple systems. Similarly, operations managers cannot get a holistic view of how their various systems are operating across the enterprise. Fragmented scanning and document capture systems also limit an organisation’s ability to comply with internal, governmental and/or industry mandates for security, privacy, auditability tracking, and reporting. In industries, such as healthcare and financial services, strict data privacy and confidentiality regulations are difficult to comply with using fragmented systems.

- **High maintenance costs**: The cost and risk of supporting disparate systems and solutions are notoriously high, due to multiple support contracts, multiple points of contacts when problems occur, and costly fees to maintain (customised) connections between systems.

**BENEFITS OF STANDARDISATION**

Significant business benefits come with replacing disparate scanning and document capture systems with a single platform that can handle all types of document input and adapts to changing needs. ibml offers a suite of software and scanners that provide a scalable and adaptable platform for enterprise scanning and document capture.

At ibml we can support the following environments: remote scanning, centralised scanning, shared services, and centralised scanning with remote scanning requirements. Here’s how standardising on a single platform such as ours can eliminate the issues of a multi-system infrastructure:

- **Improved hardware scalability**: The ibml ImageTrac family of production scanners start at the desktop and scale to ultra-high-speed stand-up devices. This range of devices allows organisations to more accurately scale their scanning and document capture platform to the specific needs of a department, application or the enterprise. ibml scanners can be transparently interchanged or “mixed and matched” as needs change, enabling organisations to maximise their investments. For instance, a service bureau or in-house processor can initially deploy a desktop device and then migrate to ibml’s ultra-high-speed scanners as volumes dictate. Hardware that an organisation has outgrown can be used for backup/disaster recovery.

- **Centralised information management**: ibml SoftTrac Capture Suite provides operational intelligence to help organisations ensure regulatory compliance, improve tracking and control, and standardise scanning operations and the information they provide. Centralised authentication provides users a single login for secure, global access to all applications. Access can be customised for specific users and groups, depending on security requirements. This assists compliance with government, industry, and customer privacy and security mandates. Additionally, SoftTrac Analytics provides a holistic view of performance metrics across an organisation’s scanning operations, providing more robust reporting. The consistent interface eases or eliminates the training burden on staff and improves usability as business requirements expand.

- **Integrated with legacy technology and processes**: SoftTrac Capture Suite is designed to work with all ibml scanners as well as those from other manufacturers, co-exist with any capture or downstream solution and support both distributed and centralised document scanning environments. SoftTrac Capture Suite also enables users to integrate existing multi-function printers (MFPs) with the centralised capture platform. Additionally, SoftTrac PostScan can format images and data for direct integration into a wide range of systems, including data capture solutions, enterprise content management solutions, image archival, and workflow/business process automation. All of this significantly reduces the threat of
Information being misdirected, late, or lost.

- **Quality control:** Ensuring the optimum quality of scanning jobs is critical for organisations, particularly those with stringent service level agreements (SLAs), rapidly-growing volumes or multiple operations centres. SoftTrac Quality Control allows users to quickly review images of documents and batches, and add comments to batches or individual documents. System administrators can pre-determine batches or documents requiring review based on a wide range of criteria, including transaction type, document type, or whether it is a flagged document. Batches can be automatically queued based on their priority.

- **Automated document classification and metadata extraction across input channels:** Organisations of all sizes are receiving an increasingly diverse mix of documents from multiple input channels. SoftTrac Synergetics employs full-page advanced text classification and image-based classification to identify and sort documents such as invoices, tax forms, mortgage documents, insurance applications, and medical records, regardless of the document input channel. Synergetics uses barcodes and other values on documents to automatically determine where a document starts and ends.

- **Decreased cost of ownership:** Leveraging ibml's end-to-end platform provides organisations with a single point of contact in the event of a system problem. This reduces support costs, accelerates problem resolution, streamlines staff training, and eases system administration.

Finally, standardising on ibml's platform means organisations will have consistent capabilities across their applications, departments, or enterprise. In a multi-system environment, staff frequently cannot perform tasks or find necessary information because they are on the "wrong" system.

**THE BOTTOM LINE**

There is no letup in sight to the growth of document and data volumes, and the value of gathering accurate data as quickly as possible. With so much at stake, selecting the right scanning and document capture infrastructure is critical to a company's ability to meet its current and long-term requirements. Organisations can achieve significant benefits by standardising on a single scanning and document capture platform, starting with one department or application and extending the platform after it demonstrates return on investment.

The ibml software suite and scanners provide a foundation for companies to lower total cost of ownership, improve efficiency, increase information visibility, and centralise administration and tracking. Standardising on a single platform in this way also enables companies to meet current and future requirements.

More info: [www.ibml.com](http://www.ibml.com)

"Organisations shouldn't attempt a wholesale replacement of their legacy scanning and document capture systems, much less the deployment of an enterprise-wide platform all at once. Overly ambitious enterprise deployments are likely to get bogged down, delaying a return on investment and potentially resulting in second-guessing among senior managers whose support is required for a project to move forward."
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