Smarter ways to work:
‘Seismic’ changes ahead

Email management:
Taming your inbox

Take that to the bank:
Five ways to transform financial services applications

The ‘Big’ issue:
Understanding Big Data

Evolve or die:
The changing role of the Information Manager
<table>
<thead>
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<th>Do you want compliance?</th>
<th>Do you want process efficiencies?</th>
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<tr>
<td>“The right file for the right patient at the right time - 100% guaranteed”</td>
<td>“Patient care and clinical effectiveness enhanced”</td>
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<tr>
<td>“Annual savings of £1.4m with the CCube scan-on-demand solution”</td>
<td>“The system architecture enables easy integration with patient information systems”</td>
</tr>
</tbody>
</table>

Call us now on 01908 677 752 or email us info@ccubesolutions.com

Visit: www.ccubesolutions.com
The big story here at DM Towers at the moment is of course the rapidly-approaching DM Awards - the numbers of initial nominations have already broken previous records and that means we are probably on course for our biggest and brightest awards night so far. Nominations will probably have closed by the time you read this, so the next step is to visit the website (www.dmawards.com) and peruse our list of finalists.

If one of your suppliers is on there - or even your own company, as we have no rules against a little self-promotion so long as you stay within the rules - then cast your vote, and by doing so become part of the industry's biggest and longest-running awards event. You can see a full list of all this year's categories on page 34.

Elsewhere in this issue you will find a perhaps controversial opinion piece from our old friends at EASY Software - UK MD Howard Frear is getting fed up with his email inbox, and frankly we can sympathise. In a sector that is so focused on the proper management of documents of almost every type, it does sometimes seem incongruous that email is still so often perceived as 'the final frontier' - an area that isn't yet ready to be tamed and controlled. As Howard argues: "We believe that email needs to be properly managed... through a process of re-prioritising the document, instead of all these endless email threads that don't support enough proper business focus any more. It is accepted wisdom that documents need to be properly managed and email clearly needs to be subject to the same discipline."

It is interesting that Howard's piece refers to discipline; email is one of those systems that has been ubiquitous in business for so long now that in many organisations it has been allowed to 'run amok', with little or no thought given to how its content - and its workflows - interact with the rest of the business. Perhaps that is because it is itself a technology solution - implemented and 'left to get on with it' without regular review of whether it is doing what the business requires. Do we need to take a step back from email and consider the processes it is supposed to be supporting? Could we even, as Howard (jokingly?) suggests, introduce a regular World Email Free Day to complement World Paper Free Day? I for one would welcome the respite, albeit temporary - but of course the next day would be a nightmare!

Dave Tyler
Editor
david.tyler@btc.co.uk
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Say hello to lower invoice processing costs, better controlled invoice receipt-to-payment times, improved cash flow and robust audit compliance.

- Accelerated processing times
- Enhanced data quality of posted invoices
- Better visibility to available cash flow
- Real-time view of authorisation cycles and reporting
- Revision-proof storage of electronic invoices
Wincanton Record Management’s (WRM’s) submission has been evaluated as the ‘number 1’ submission put forward for a new Health Trust Europe (HTE) framework.

HTE has awarded WRM to this multi-contractor framework agreement enabling them to provide records management, scanning and related services to Healthcare and Public Sector bodies, including Central Government Departments and the Ministry of Defence across the whole of the UK.

WRM’s submission has secured the top spot on the HTE framework in two categories: Document Storage, Retrieval and Destruction and Document Scanning and Secure Destruction services.

The HTE framework is a safeguard that allows Public Sector organisations to access services in the knowledge that providers have undergone a rigorous compliance and evaluation process which measures their quality and value. This process is designed to drive operational efficiency as organisations can implement cost effective records management solutions quickly, without going out to tender, but with the added peace of mind that the supplier has already been evaluated.

HTE acts as an agent in providing procurement services to a vast range of NHS and wider Public Sector organisations and is committed to delivery genuine savings opportunities. The main objective of the HTE framework is to provide an end-to-end solution for the needs of the Public Sector whilst increasing efficiency and savings.

www.wincantonrm.co.uk

Innovative, automated work processes

Xerox has introduced new services and tools to improve the way retailers, financial institutions, healthcare systems and other large enterprises deal with documents. ‘Organisations can have a love-hate relationship with paper. It remains critical to everything from invoicing to collaboration but it can also cripple productivity. That’s why workflow automation is a business priority,’ said Mike Feldman, president, Large Enterprise Operations, Xerox. “Eliminating the inherent issues of manual, paper-based work streams can improve operations and accelerate benefits derived from managed print services.’

Xerox’s Workflow Automation Solution for Supply Chain Optimisation, a service-based retail offering, uses the Datawatch Managed Analytics Platform to digitise, centralise, automate and govern error-prone and costly manual steps of a product lifecycle.

The solution reduces labour and print costs, simplifies inventory and invoice reconciliation and improves fill rates by syncing data and applying automated analytics at the store level.

Xerox is also introducing several workflow automation solutions built on its partnership with Hyland, creator of OnBase, which automate processes critical to business functions, such as Loan Application Processing, Health Records Information Management, and Human Resources Onboarding.

www.xerox.com

Kodak Alaris enhances i4000 Series

Kodak Alaris has added performance enhancements and a new model to its i4000 Scanner family. The refreshed i4250 and i4650 Scanners and the new i4850 Scanner are built on the i4000 platform and are now equipped with features that help scanning professionals process documents more efficiently than ever.

“Kodak Alaris is committed to helping our customers continuously improve their document capture processes - and in turn, achieve better business results. Our new i4000 Series Scanners maintain the strong features that our customers have come to rely on, and add enhanced functionality to help organizations speed up business transactions,” said Tony Barb, Products & Services general manager and vice president, Information Management, Kodak Alaris.

The new i4000 Series Scanners provide organisations with time-saving features that prevent interruptions and improve productivity. A larger control panel provides a clearer view of scanner status and menu options to empower users to quickly resolve issues. The new control panel enables users to identify problems such as multi-feeds directly on the scanner, eliminating time spent moving from scanner to PC, and improving overall productivity.

www.kodakalaris.com

Datafinity has added M-Files to its product portfolio. Documents in M-Files are tagged with search fields for quick access and are also fully searchable within their content. M-Files eliminates the confusion of having multiple versions of the same document that a team is working on, so you can easily track changes, and users can view, save and e-sign documents from your mobile and tablet using the M-Files app.

M-Files can also be used offline, while ensuring that your documents stay in sync. It integrates seamlessly with existing infrastructures, including Windows, Office, access services in the knowledge that providers have undergone a rigorous compliance and evaluation process which measures their quality and value. This process is designed to drive operational efficiency as organisations can implement cost effective records management solutions quickly, without going out to tender, but with the added peace of mind that the supplier has already been evaluated.

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www.datafinity.co.uk/mfiles

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Lexmark completes Kofax acquisition

Lexmark has closed on its acquisition of Kofax Limited. Lexmark acquired Kofax in a cash transaction for $11.00 per share, for a total enterprise value of approximately $1 billion.

This acquisition will nearly double the size of Lexmark's Enterprise Software annualised revenue to approximately $700 million. Lexmark also announced that Scott Coons, president of Lexmark's Enterprise Software, has decided to retire, effective at the end of July 2015. Coons has successfully led Lexmark's software division since the company acquired Perceptive Software in 2010. Reynolds C. Bish, CEO of Kofax, succeeds Coons as president of Lexmark's Enterprise Software.

www.lexmark.com

Cystic Fibrosis Trust selects DocuSign DTM

Cystic Fibrosis Trust is to standardise on DocuSign for Digital Transaction Management (DTM). As an integral part of Cystic Fibrosis Trust's three year IT strategy, DocuSign will help the nonprofit achieve its digital transformation to automate manual, paper-based processes including fundraising, HR and other back office paperwork.

With DocuSign, Cystic Fibrosis Trust will empower its members, donors and staff to securely complete paperwork 100% digitally - anytime, anywhere.

www.docusign.co.uk

Prime Document movers

Andrew Page, one of the UK’s leading distributors of quality auto parts, have chosen Manchester based Prime Document as their preferred document management company. Processing, creating and delivering over 85,000 documents each month for ‘The Autoparts People’, Prime Document’s remit is to increase document quality, integrity and fulfilment times whilst also reducing overall post costs.

Providing weekly print, mail and e-billing services, Prime Document will be responsible for the timely processing, creation and delivery of critical invoices, credit notes and statements. Key to the account win was Prime Document’s e-capabilities and proven corporate experience. By leveraging the full potential of their ‘ecco’ e-document management and e-billing technology, Prime Document were immediately able to deliver on all of the clients requirements and more. The new digital document management system enables Andrew Page's credit control teams to instantly access client accounts and document archives at the click of a button. In addition, by increasing the number of clients subscribing to e-billing services, Prime Document were also able to reduce print and postage costs straight away.

Those remaining on traditional forms of document delivery, (the trusty document in the post), will now start to receive a more coordinated compilation of documents in fewer envelopes. By utilising state-of-the-art document merging technology, Prime Document are able to merge 40% of all documents in order to save postage costs whilst increasing the overall customer service experience.

www.primedoc.co.uk

V1 to automate invoices for Greencore

Greencore Group, a leading international manufacturer of convenience foods, has selected V1's document management software. The solutions will automate the Group's paper-based accounts payable (AP) processes and manage more than 360,000 invoices a year. The software will be rolled out across the entire Group, including sites in the UK and USA from July 2015.

Greencore has a £1.3bn turnover and serves all of the major UK retailers and the convenience store, small store and grocery channel in the US. The first of the Group’s three UK divisions, Prepared Meals, will go live with V1 Authorise, Capture, Archive and Form this summer. The Food to Go, Grocery and Form this summer. The first of the Group’s three UK divisions, Prepared Meals, will go live with V1 Authorise, Capture, Archive and Form this summer.

V1 was selected by Greencore following a competitive tendering process, involving two other software providers, due to its specialism and reputation for delivering high quality automated AP systems.

The manufacturer's current AP processes are heavy paper-based, which is time-consuming and laborious. Invoices are scanned and saved in an electronic system or physically stored. Authorisation involves invoices being emailed or posted, with queries bouncing back to the AP team who then have to find the original paperwork.

With the V1 software, Greencore will be able to receive invoices in a variety of formats including paper, PDF via email and Electronic Data Interchange (EDI). These will be automatically stored electronically and emailed to the relevant person for authorisation. V1 Capture will integrate with the accounts system, System21, to automatically match invoices and speed up the payment process.

Documents, such as purchase orders and delivery notes, which accompany an invoice will be accessible via the solutions, making it easier for managers to resolve queries in the first instance. If invoices are not dealt with within the set time, they will be automatically escalated to the relevant manager.

www.wearev1.com

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www.primedoc.co.uk
Evolve or die?

Records and Information Managers are struggling to survive in consumer-focused businesses, according to a new Iron Mountain study.

The role of records and information managers is at a crossroads as the function struggles to prove itself relevant in customer-focused industries such as retail, a new study from Iron Mountain reveals. Just one in three retail businesses have a records and information manager, compared to traditional process- and compliance-based industries such as manufacturing, where 46 per cent have one, energy (48 per cent) and financial services (50 per cent).

Over a third (38 per cent) of the retailers surveyed in a study of European and US mid-sized businesses admit they don’t fully know what their records and information professionals do, and less than half (45 per cent) say the role currently adds significant value to the organisation. This compares with the three-quarters of business leaders in manufacturing (79%) and energy (74%) who say they understand clearly what their records and information managers do.

However, despite their uncertainty around what records and information managers currently contribute, 92 per cent of retailers believe information professionals should play an important role in making the most of the organisation’s information.

Harnessing the full value of customer data while keeping it safe and compliant is becoming increasingly important for success and brand reputation in consumer-focused businesses, and the retail sector was an early adopter of data analytics as a means to better understand its customers.

It is therefore important to understand why the contribution of records and information managers appears to be so misunderstood. One explanation could be that the records and information professionals employed by these businesses are confined to more traditional content types; with little responsibility for emerging and unstructured forms of content that are rapidly growing in importance and use in consumer sectors.

For example, around three quarters of records and information managers in retail businesses are responsible for the management of customer data (71 per cent) and email (76 per cent), with just a quarter involved with external social media content (29 per cent) and mobile communications (37 per cent).

The good news is that these trends do not necessarily herald the extinction of this key information management role. Despite the marked differences uncovered in both the understanding and employment of records and information managers, business leaders across all sectors are unanimous about the valuable skills the role could offer in the coming years.

For around two-thirds of business leaders, these skills include the ability to approach information with a strategic outlook and an awareness of wider business goals (61 per cent); the confidence to communicate effectively across other teams and departments (68%); the ability to make information easily accessible (64 per cent); along with compliance, security and digital transformation skills (62 per cent).

‘While there are signs that the natural habitat of the records and information manager is disappearing, the future looks bright for those willing to adapt,’ said Sue Trombley, managing director of thought leadership at Iron Mountain.

‘Companies in all sectors are becoming more customer- and data-driven. They want to exploit information where possible for business success and competitive advantage. As a result, customer-focused data flows are now getting as much attention as more traditional processes aimed at protecting information. Our study supports a view that records and information managers can play an active role in enabling the transition to a data-driven future. We urge them to embrace the new information landscape and to build the skills and expertise they need to thrive. Extinction is not a given, but evolution is inevitable.”

More information on how records and information managers can meet future business needs can be found in the whitepaper: Overcoming the Disconnect, available via the Iron Mountain website.

More info: www.ironmountain.co.uk
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.
Effective practice
Chartered accountancy practice DTE took the opportunity presented by an office move to revisit its document processes, and as a result has now scanned over 6 million paper documents as well as regaining control of its email systems.

Over the past five years, leading North West chartered accountants DTE has archived over six million documents within the Invu Document Management system to create a single source of client inbound and outbound correspondence. In addition, using Invu Email Management, DTE is automatically capturing 95% of all emails. As a result, document storage has been drastically reduced - supporting the company’s recent move to a new, open plan office space - and the ease of information access within Invu is transforming the speed with which DTE can respond to client queries.

TIMELY RESPONSE
DTE Business Advisers offers a broad range of accountancy and advisory services to businesses and individuals throughout the UK. With offices in Manchester and Bury, DTE’s services include audit, tax consultancy, corporate finance, forensic accounting, payroll, financial planning and IT support.

In common with any organisation involved in financial planning, accounting and tax services, DTE generates huge volumes of data, primarily from client correspondence. Managing this information, and ensuring it was correctly located within each client’s file was a huge task. With the evolution towards email, the company was also finding it difficult to ensure documentation was correctly stored and filed - creating difficulties in gaining the fast access to information required to respond to client queries.

Five years ago DTE decided it needed to address the deluge of paper documents and evolve towards a paperless office. Richard Bell, Associate at DTE Group explains, "With all documents stored in a paper format it was difficult for staff to locate information quickly and easily. Client queries can range from ‘what is my tax payment and when is it due’, to a question about wealth planning or pensions activity that occurred several years ago. With paper based information located in several locations it was difficult to respond to clients in a timely fashion."

SECURE DM
Given the sensitivity of client data, DTE was concerned about the security of any document management solution. Having reviewed the market and closely assessed the quality of security within each product, DTE opted for the Invu document management system.

The first step was to deploy Invu within the accounts preparation and tax compliance department, with individuals tasked with scanning all inbound correspondence. It became rapidly apparent that to maximise the value of the DMS, DTE needed to expand the use of Invu across the entire business to create a single source of all client correspondence. As Richard
CASE STUDY: DTE

explains, "The major advantage of using Invu is that staff can quickly and easily locate all the documents they need to resolve queries." The search facility within Invu ensures that misfiled documents are no longer an issue. Instead of saving information to a client file, it is saved to a folder within Invu, "The Invu search will locate a document irrespective of where it has been filed, ensuring immediate access to any information as and when required. Staff simply enter the client name in the search bar and Invu provides every piece of information relating to that search," Richard explains.

VOLUME CONTROL
DTE is also using Email Manager from Invu to gain control over the rapidly escalating volumes of email correspondence. This information is, again, highly sensitive, and must be accurately recorded within the client's file. Before implementing Email Manager, members of staff were required to print off the email and manually store it on the client's file. Not only was this a highly inefficient model and one that was clearly at odds with the paperless vision but the sheer volume of emails received into the business made this a very time consuming process, which left DTE vulnerable to manual errors and inaccuracies.

As Richard says, "Everyone knew the emails were not being correctly filed but it was such a mammoth task, no one knew where to start. Implementing Invu Email Manager has been fundamental in improving the way we operate as a business: around 95% of our emails are now captured and automatically applied to the correct electronic client folder, making us far more efficient."

Having implemented effective practices for managing all new documentation, with a recent major office relocation the company needed to address the paper archive. As Richard explains, taking reams of paper documents to the new office wasn't an option, "We moved to modern, open plan offices where storage is limited."

DTE therefore needed to perform a Back Scan of documents that existed before the introduction of Invu - and had to decide whether to outsource this to a scanning bureau or manage the process internally in one hit, or incrementally as and when staff were available. The office move precipitated the decision, and for the past year DTE has followed Invu's advice and invested in three Kodak scanners with four dedicated staff working on the Back Scanning project. Richard says, "We had to make a decision to either continue as we were and pay for additional off-site storage, or change our processes internally and use Invu to create a complete document archive. The latter is far more cost effective and delivers measurable business value."

"Going forward, the plan is that the existing resource in the business will be able to keep managing the files and the scanning as we expand the use of Invu to store every aspect of business documentation, including invoices," says Richard.

Following the Back Scanning exercise, DTE has made the entire archive of correspondence available to staff, ensuring that client queries related to older activities can also be rapidly accessed. Richard explains, "The archive is accessible to everyone, making it much easier to locate files and find the right information."

INSTANT RESPONSE
DTE estimates it has now scanned and electronically archived over six million pieces of incoming and outgoing correspondence - and is well on the way to realising the paperless vision. The combination of scanned documents, including the archive, and email management has transformed the way DTE can respond to its clients. Rather than undertaking a time consuming, manual search through a raft of documents - including the paper archive in the basement - hoping that the file was in the correct location, and then returning a client's call, the response is immediate.

As Richard confirms, "With Invu, the information is now at our fingertips. If a client calls and says 'you sent me my tax return, I think I need to pay something', I can literally open Invu and do the search for the scanned tax return; it will open while they are on the phone and I will tell them how much they need to pay. The ability to respond so quickly to clients is fantastic."

More info: www.invu.net
The Mary Evans Picture Library located in Blackheath, London, began life in 1964, with a philosophy that has remained unchanged for over 40 years: to make available and accessible images created over the centuries that were originally published in books, on posters, in advertisements, or as prints. Included in their collection are original copies of many popular illustrated periodicals whose content are of great value to researchers worldwide as they provide a window into society's past. But accessing their content meant either a visit to the Mary Evans library in person, or piecemeal requests for copies.

ProQuest, head-quartered in Ann Arbor, Michigan, is in the business of providing content access solutions for researchers and libraries globally. In March 2014 ProQuest issued an RFP for a service provider to capture the entire content of the collection for online publication. The challenge for the bidders was that scanning was required to be undertaken on site, but the space available within the library for setting up a capture operation was extremely limited. A further challenge was the delivery dates required by ProQuest - they wanted to launch the collection online in September 2014 with at least a partially complete catalogue. Including magazine covers, advertising pages, picture pages as well as printed text, the periodical collection was estimated at over 900,000 separate pages.

Capturing social history

Almost a million pages from historic publications have been made available online thanks to a successful project involving specialist book-scanning equipment from i2S.

The Mary Evans Picture Library from the copyright holder, Illustrated London News Ltd. The portfolio consisted of Tatler, The Sphere, The Graphic, The Sketch, and Bystander, all periodicals published between 1869 and 1990. In March 2014 ProQuest issued an RFP for a service provider to capture the entire content of the collection for online publication. The challenge for the bidders was that scanning was required to be undertaken on site, but the space available within the library for setting up a capture operation was extremely limited. A further challenge was the delivery dates required by ProQuest - they wanted to launch the collection online in September 2014 with at least a partially complete catalogue. Including magazine covers, advertising pages, picture pages as well as printed text, the periodical collection was estimated at over 900,000 separate pages.
WELL-PLACED TO SOLVE THE PROBLEM

Automated Document Services Ltd. - Auto Docs - is a document capture services agency based in Glasgow, Scotland. Auto Doc's core team have over fourteen years experience specialising in the digitisation of books and they have carried out some highly important and prestigious capture projects for a large number of clients. Auto Docs is unique in Scotland as being the only agency certified to ISO 27001 information security standards, as well as having ISO9001 quality management accreditation.

When the ProQuest RFP was issued in March 2014, Auto Docs was exceptionally well-placed to make a strong bid as they had available both the scanners and the skilled operators required for the Mary Evans project. Key to their capture capability was their CopiBook Cobalt book scanners from i2S Digibook provided by Spigraph Network, the exclusive distribution partner for i2S in the UK. ADS chose the CopiBook Cobalt as it is the leading A2 book scanner available in the market and is well-known for its superior image quality and high productivity. ADS's experienced operators appreciated its easy-to-operate ergonomic design and versatility with numerous automatic and intuitive capture modes capable of scanning books, manuals, newspapers, photos and other document types.

The primary challenge for Auto Docs was balancing ProQuest's project timeline with the extremely limited on-site space & time available for the capture operation. The floor space available to host the digitisation operation was approximately 4m by 2m and, because of this, Auto Docs would be limited to installing only two capture workstations. Would this be enough to capture the estimated 900,000 periodical pages in the time available?

ProQuest have been extremely satisfied with the services provided by Auto Docs. Due to the work from ProQuest and other customers, Auto Docs are now opening a London Docklands bureau to be closer to the location of the many important national archives that are located in London.

"The team at Auto Docs feel privileged to have had the opportunity over the last year to successfully complete the quality digitisation of British Periodicals for ProQuest. Our CopiBook Cobalt book scanners provided the efficiency and best-in-class technology which enabled our team to deliver the project within the required time frames and with virtually no rescans," said Pamela Tod, Director of Auto Docs. "It has been a pleasure to deliver this project and work with our partners at Mary Evans, Illustrated London News & ProQuest. Our experienced operational team look forward to completing many more such projects over the next few years, and we appreciate the support of our partner Spigraph Network in implementing our business growth plans and to the further expansion of our service bureaus in Glasgow and London'.

"Spigraph Network is pleased to support Auto Docs in providing industry-leading technology, strong vendor partnerships and industry expertise" said Wayne Davey, CEO Spigraph Network. "With over 20 years of experience in delivering best-in-class digitisation, preservation and document automation solutions across EMEA, we are pleased to partner with Auto Docs to support their business growth, deliver high-quality service and bring unique value to clients in the UK."

More info: www.spigraph.com
After paper-free, should we go email-free?

EASY Software UK’s Director of Sales and Marketing, Howard Frear, is frustrated with all the email in our lives - or rather, our lack of control of them. I don’t know about you, but some of those jokes on Facebook contrasting life pre-technology and life these days do amuse me. I’m looking at one that has a thin chap and a fat cathode-ray TV, labelled ‘TV watching 1990’ and a very fat chap and a super-thin display for the 2015 version.

But joking aside, a lot of these memes have an underlying serious point. They ask us to look with a bit of scepticism about how deeply smartphones and ‘always-on’ connectivity have penetrated our daily and family lives. There may be some rose-tinted thinking here - was life really that much better in 1970s Britain, after all? Probably not. But at the same time, perhaps we need to take a step back sometimes from the devil’s bargain that we’ve made with technology.

Take email. Simultaneously the most efficient and ubiquitous business communication method and yet also one of the most time and productivity-destructive weapons of mass ‘distraction’ ever invented!

I can’t be the only one who sometimes wonders, ‘Do I go to the office to work, or to just tend my in-box?’ Remarks to this end recently made by a distinguished UK psychologist and academic, Sir Cary Cooper, struck home for many of us.

Recently, he warned the British Psychological Society’s annual conference that employers have to start tackling what he labelled as an ‘epidemic’ of staff checking their work emails out of hours. He even suggested that employers should flash warnings on the screen if workers were detected to be using work email when they should be relaxing or engaged in family activities.

Why? Because, in his view, the ‘compulsion’ to deal with emails as soon as they arrive in your in-box may be a real factor in the productivity gap that we’re getting more and more conscious about in the UK: ‘For people to be working at night, weekends and holiday on emails is not good for the health of our country.’

Cooper, who has in the past advised the government about mental health in the workplace, later expanded his warning to a BBC reporter: ‘Every organisation has to come to a conclusion as to what is a good way to be operating, and the best way to do that is by asking the employees themselves: how do we stop this epidemic of us being linked all the time to our emails?’ He then goes on to decry what he sees as a development of a macho work culture in the UK in which staff want to be seen to be available by email at all hours - a culture he thinks is causing stress and depression, and in turn making workers less efficient.

GETTING EMAIL UNDER CONTROL

But what can be done about it? Here at EASY Software UK, we believe that email needs to be properly managed.

We do that for organisations through a process of re-prioritising the document, instead of all these endless email threads that don’t support enough proper business focus any more. Instead, we work with teams to make email archival and retrieval as efficient and friction-free as possible, as we think this is the way to encourage proper management of all the information flowing through your business process and workflows. It is accepted wisdom that documents need to be properly managed and email clearly needs to be subject to the same discipline.

A DATE FOR YOUR DIARY?

You may have supported great things like World Paper Free Day (6 November this year) in the past, and I’m now starting to wonder if we might not start a campaign for the near future devoted to World Email Free Day; would you sign up? I know I would - as, I’m sure, would Sir Cary!

More info: www.easysoftware.co.uk

More info: www.document-manager.com
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► Leeds NHS Teaching Hospitals Trust
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► Liverpool Women’s NHS Foundation Trust
Helping the legal team stay on top of compliance and security
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OPINION: CHANGING WORKING PRACTICES

Work smarter, not harder: those four words act as kind of collective philosophy for all stakeholders in an organisation. From chief executives at the top to entry level recruits at the bottom, there is consensus, a mutual desire to be part of an enterprise that is exciting, challenging and fun. Everyone shares that ambition because that’s how work should be - it’s a place where you belong, where your contributions have real value, where your time is being spent well and where you feel good about yourself.

While such environments will invariably foster a culture where people are, on occasion, happy to come in earlier or work later than usual, the ideal is to get to a point where all employees feel that this no longer matters; that they are able to get all their work done, hit their targets and contribute to their company’s successes on their own terms. And, all without feeling burdened by various occupational demands that create a climate of unease, stress and hardship.

However, the truth of the matter is that we are not quite there yet. In its 2014 paper ‘Megatrends: Are We Working Harder Than Ever?’, the Chartered Institute of Personnel and Development concluded that, in part, work “has become a more intense and demanding experience”.

It continued by saying that this was ‘not necessarily a bad thing’, explaining that technology has been influential in not only making work more challenging, but more productive and, for employees, more lucrative (an increase in wages, for example, through greater production).

That positivity is tempered though, with the CIPD adding in its report that it is highly likely work will become more intense over the coming years, and, furthermore, even in more positive economic times, the pressure felt by most employees will not ease up. Work will continue to be demanding, more so than it now is in fact.

It said: ‘It is difficult to see many organisations taking conscious decisions to reduce workloads or adopt a more relaxed approach to deadlines unless this becomes a critical business

The smarter way to work

In the first of a two-part article, David Wilkinson, Sales Director, Storetec Services Ltd., offers a view of a world in which flexible working, greater collaboration and new technologies will deliver seismic changes to how organisations think about work.
issue (to the point of having a negative impact on customer satisfaction or service delivery or damaging the reputation of the organisation). This need not be the case, and in this article we will look at how a smarter way of working is possible through increased flexibility, greater collaboration and investment in new technologies.

GETTING FLEXIBLE

In the summer of 2014, a watershed moment in the history of the work occurred - symbolic for some, transformative for others. The government brought into effect new rules that extended flexible working to all employees. Up until June 30th, that right, legally speaking, was only available for carers and individuals who looked after children. Now 20 million employees could enjoy that flexibility.

Speaking at the time, the then deputy prime minister and leader of the Liberal Democrats Nick Clegg said that modern organisations are appreciative of the benefits attached to flexible working. Not only does it boost productivity, it also enhances staff morale and helps retain/attract talent. He added: "Today is a crucial milestone in how we can help people balance their family life with work and caring responsibilities. And from next year, shared parental leave will allow mums and dads to be able to choose how they care for their newborn in those first precious months."

His colleague Jo Swinson, then business minister and still an MP (she lost her seat at the 2015 General Election) commented in an interview with the Independent on Sunday that rigid working practices were anomalous to the spirit of the 21st century. The world had to get away from a "1950s mindset". Flexibility is the new norm.

WORKING SMARTER

Smarter working cannot really exist without flexible working practices and organisations that have been reluctant to change - or asserted that this isn't for them - are no longer able to say as much for three main reasons. One, it is increasingly difficult to deny a reasonable request for flexible working from an employee because, by and large, a lot of work can be done outside of an office. Workplaces are still important but not essential for day-in and day-out activities. ACAS has produced some detailed guides on best practice for submitting and dealing with such requests in the workplace.

Two, there is a real mood among employees for flexible working practices to be standard practice. For example, in its 2014 report, 'HR: Getting Smart about Agile Working', the CIPD found that 35 per cent of respondents would like to change their working arrangements. Most want a better balance between their personal and professional lives.

And three, it is counterproductive for enterprises to persist with either robust or fairly static working arrangements. Simply put, flexible working makes good business sense and opens up all sorts of possibilities that would not be achievable otherwise. And, as outlined above by Mr. Clegg, the positive knock-on effects of going flexible are numerous and substantial - it'll be to the detriment of an organisation to ignore this.

In many ways, the evolution of the office and the generalised idea of how, when and where we should work has run contrary to what it should be. However, this is what hindsight affords us, the ability to look back with fresh eyes from a position whereby we are more informed - learning from our mistakes so to speak.

Arguably, from the start, everything should have been flexible because it is an approach that doesn't just 'feel right', it also has real relevance to enterprises and their respective workforces. Everyone has something to gain, be it, from an employee perspective, more time with their family, or for employers, an even greater sense of loyalty. Even the environment gets something out of it, benefiting from less carbon emissions for example. It really is a win-win situation.

CONNECTING THE DOTS

Lately collaboration has become one of the big buzzwords floating around workplaces in most sectors and industries. The underlying sentiment is that we - as enterprises - must do more of it, do it better and do it smarter. This has occurred, in part, thanks to a shift in organisational culture and developments in technology. As with flexible working, it is apparent that if you’re not collaborating in a creative and inventive way, you’re going to have shortcomings.

This is an important distinction to make because although businesses acknowledge that much of their success depends on effective collaboration, both externally and internally, there has been little investment in the strategic application of this. It has been, by and large, an inevitable feature of multi-employee organisations - workers often need to engage with one another on various projects. It hasn't been leveraged to full effect though.

Against a backdrop of increasing complexity and an intensification of competition, collaboration needs to be more than just a by-product of work. Collaboration has to be nurtured and amplified, and, in doing so, business leaders can modernise the way they work, create a vibrant atmosphere and transform their bottom line.

(In the second part of this article in our Sep/Oct issue, we find out more about the impact of collaboration - and new technologies - on the world of work)

More info: www.storetec.net
Everything is possible

DM Editor David Tyler catches up with Olivier Vergues, General Manager in charge of Xerox’s workflow automation business

David Tyler: Can we begin by clarifying the relationship between Xerox Global Services and Xerox Scanners - how do the two businesses work together?

Olivier Vergues: My role within Xerox is to head up the promotion of workflow automation to large enterprises throughout Europe: we are busy building offers around that concept, and thus enabling our sales teams to focus on what we refer to as ‘digital transformation’. The reason that Xerox has been working with Visioneer/Xerox Scanners is to help us to address some specific goals on a worldwide scale: it’s not just about document scanners, we’re seeing a lot of interest in bundling those capabilities with the data capture and workflow automation facilities that we are now able to roll out for customers who need them.

When our managed print services (MPS) customers buy from us today, they are in effect buying into a road map wherein we can commit to streamlining many of their business and personal processes. This can mean scanning content, obviously, but it can also mean simply not having to print content. This maybe sounds quite ‘generic’ for the industry - we all know the trends behind organisations moving towards greater digitisation - but in fact Xerox has a very specific strategy around digital transformation.

Research clearly shows that implementing digital transformation technologies has a very clear impact: in a bank branch network for example, it will impact productivity and cost reduction, as well as helping with compliance and regulation. All of these components are directly linked to the benefits of digital transformation.

DT: So do your customers and prospects already understand the potential benefits when you speak to them, or is there still an element of educating/informing about the technologies and their applications?

OV: Interestingly, it appears to us that the organisations that can achieve the most benefit are the ones who can manage to simplify their business, and that is all about removing paper from the process. You might still have paper at the ‘entrance’, i.e. the capture stage, but once it has been scanned and the data digitised, there should - ideally - be no more paper in the process. This is what makes a business function simpler and more efficient.

So then, we are looking for businesses who already understand this basic fact: then we can propose solutions that can help them achieve that simplification. One of our marketing taglines at present is ‘Simple at work’ and this is what we mean by that - and we find it resonates with our customers.

DT: It sounds as thought the sales model has to change as much as the technology - moving toward a more consultancy-based approach?

OV: Of course all of our customers will say ‘Yes, we want to have more digital interaction with our customers, our partners, our employees.’ The question is, how? At Xerox we don’t sell consulting for its own sake - we sell consulting to enable
“COMPARSED TO FIVE OR EVEN TEN YEARS AGO, WE ARE SEEING PROJECTS GETTING SMALLER, AND CUSTOMERS ARE GETTING MORE REACTIVE AND REQUIRING FASTER RETURNS. SO WITH XEROX SCANNERS, FOR EXAMPLE, WE ARE ABLE TO IMPLEMENT A PROJECT VERY QUICKLY, COMPARED TO A LARGER PROJECT THAT COULD TAKE MANY MONTHS TO BECOME PRODUCTIVE. AGAIN, IF YOU IMPLEMENT SOMETHING SIMPLE, THEN YOU WILL SEE THE RESULTS MUCH MORE QUICKLY.”

...
KODAK i5850

The i5850 is the largest scanner currently manufactured by Kodak Alaris, and it is clearly aimed at workhorse environments such as BPOs and mailrooms. Nonetheless this is far from being a ‘speed and volume but not much else’ device, featuring as it does a number of sophisticated and innovative elements to improve productivity.

It has the capability to scan ‘dual stream’ - capturing front and rear images simultaneously in black and white and colour. This effectively transforms a 210 pages per minute scanner into an 840 images per minute one. This is ideal for applications where different versions of an image might be routed to different destinations depending on the business requirement - a colour image might be passed into the business process where it is OCR’d for data extraction, while a B/W scan is sent direct to archive on microfilm, for instance.

The i5850 can handle up to 750 sheets in the input hopper, and - crucially for its target market - boasts the ability to scan at 300 dpi dual-stream without impacting scanning speed at all (maximum resolution is 600 dpi if required). It connects via TWAIN or ISIS interface as would be expected of any device in this market, and also comes with Kodak PerfectPage to facilitate auto-rotate, auto deskew, hole fill, streak removal etc. for optimal image quality processed right on the scanner - reducing the post-scan workload.

Indeed much of the design of the i5850 is clearly aimed at reducing the stresses and strains of the typical BPO/bureau mailroom scan operator. It is height adjustable on a motorised plinth to suit standing or seated operation, and even at high speeds is surprisingly quiet in operation. LED illumination is designed to last for the life of the scanner, reducing the total cost of ownership of the device. It also includes a post-scan printer. It can capably handle long documents as well, making it ideal for projects involving, for instance, medical scans.

Kodak offers a swappable dual-tray output hopper as an optional extra for jobs that require out-sorting of cheques or separator sheets. With the potentially huge (and often un-quantified) cost of producing separators, this is another attractive option for bureau/BPO users. The i5850 has an impressive five separate ultrasonic sensors for multiple feeds (Post-its, stapled notes etc.), which Kodak has branded as ‘Intelligent Document Protection’ and it allows the user to set the device to pause rather than stop on a multi-feed detection. User maintenance is remarkably simple and straightforward, with practically all the consumable areas easily accessed via one lever. Kodak’s ‘small consumables kit’ for the device is designed for a 3.5 million scan cycle, giving some idea of the longevity and sturdiness of the i5850.

In summary the i5850 has clearly been developed to address the specific requirements of Kodak’s target market for the machine: it reduces the prep workload of the operator, reduces downtime, and allows the user to accept/reject images on screen in an instant.

More info: www.kodakalaris.com

VERDICT

Kodak has a new - and highly impressive - ‘top dog’ scanner. The i5850 is fast and robust, suited to the demanding environments for which it is designed (BPO, bureau, mailroom), yet also includes a number of surprisingly sophisticated features including onboard image processing and Intelligent Document Protection.
Convert.

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Your documents. Managed.
EDRM in Healthcare: the next step

Use of established technologies to solve patient information problems in NHS Trusts is viable, has been proven, and is delivering real and tangible benefits. So, asks Vijay Magon of CCube Solutions, where do we go from here and what else can technology deliver?

The UK NHS is the "envy of the world" - a bold headline which is largely true. Like any national service that deals with huge numbers of staff, customers, and complex processes, there are failings which must be (and are) properly scrutinised and typically followed by directives for improvement.

Using technology to improve healthcare delivery and patient care has been a hot topic over the last few years. Technology is not just making its presence felt in operating theatres and hospital wards - NHS Trusts and PCTS are quickly becoming aware that being able to access, store and share patient records is as crucial to improving patient care as the latest breakthroughs in medical science. The need for an efficient and effective information management system manifests itself across all levels of modern healthcare provision. It encompasses everything from consultants and surgeons accessing x-rays and scans from workstations across a hospital complex, ending the need for cumbersome transfer of paper records from one site to another, with the incumbent risk of them being misplaced or lost or misused; to administration staff using systems that help automate selected processes, saving time and money.

Add a dose of security and audit and suddenly the prospect of a system that mandates governance and eliminates unscrutinised misuse, becomes quite real. This has been achieved in some NHS Trusts who took the bold step to deliver change some years ago and are now leading the way forward.

The implementation of such an electronic system turns around the culture of information. Much like the NHS' founding principle, the modern information management system provides a 'cradle to grave' auditable trail of legacy documents such as patient records and correspondence. Implementing an electronic information management solution delivers the proverbial 'double whammy' of improving accessibility, whilst ensuring that healthcare providers like NHS Trusts and PCTS are fully compliant with their legal obligation in storing healthcare records.

Document management or 'electronic filing' started with turning paper into electronic files, which can save space, be moved around and shared. Lessons learnt from early adoption of such systems are now being realised through more sophisticated Electronic Document & Records Management (EDRM) Systems which include electronic content. Add a dose of systems integration, workflow,
electronic forms, content extraction, and compliance, and suddenly organisations are beginning to realise tangible benefits from this technology. With appropriate safeguards in place, EDRM has a proven track record of long-term cost savings combined with increased efficiency with no loss of security (in fact, enhanced security).

The core component of any information management strategy is document management. Unfortunately, document management is still regarded as a luxury and, in many cases, used as glorified electronic filing of patient records, with little or no return from investments in such systems which fail to deliver information at the point-of-care. EDRM offers much more than an electronic filing system - EDRM can deliver an effective, enterprise-wide approach to patient information management, integration, delivery, and workflow, for both clinical and non-clinical applications. It is the underlying technology which provides a compound document repository that can be shared among many departments, to unify the document repository, provide access to the Integrated Patient Record - at the point-of-care - and support generation and management of patient information without relying on paper. The key requirements are:

1. Capture and manage legacy (paper) patient records
The majority of document management solutions in use provide facilities for capturing, managing, and delivering electronic patient records. Organisations looking to digitise legacy records have to meet a variety of business objectives which may include:
- cost related to maintaining existing record libraries;
- pressure on storage space, especially if moving to a new site;
- operational costs - finding and delivering records, especially across a number of geographically distributed sites;
- strategic objectives related to operational performance and efficiency gains;
- customer services
Solutions based on EDRM technologies are in place and have delivered varying benefits in terms of space utilisation, efficiencies in delivery legacy records, access when required, etc. EDRM systems also provide additional benefits in terms of audit and lifecycle management.

It’s important to align digitisation of legacy records with specific processes within a Trust, rather than simply digitising records to alleviate problems related to storing and using paper. For example, the “scan-on-demand” approach applied to the Outpatient process has enabled a number of Trusts to realise very tangible benefits including year-on-year cost savings while delivering “paperless healthcare” - a good example of process mapping and application of the right IT solution to manage the huge transformational changes.

2. Capture and manage electronic patient information
EDRM offers a centralised information repository which is not restricted to storing scanned legacy records. Electronic patient information is generated by many information systems in use, for example, clinical and laboratory systems, PAS, portals, decision support, EPR, medical devices, etc. A portion of this information sits in structured repositories, i.e. within relational databases and is used to generate human-readable documents as and when required.

These documents may be output in read only format (e.g. PDF) and saved on storage servers. Some devices will output patient information into read-only documents which are saved on storage servers. Most Trusts hold large volumes of such information across storage servers. Access is at the file level, i.e. a user will navigate through folder and sub-folder structures looking for specific files which follow agreed naming conventions. These documents are disconnected with any other patient records.

3. Support creation of new patient information - Letters and Electronic Forms
Once existing electronic repositories are migrated into EDRM, it’s important to ensure that systems no longer feed storage sub-folders, i.e. new patient information can be captured at source and imported into EDRM. EDRM supports integration with multiple systems and devices that generate patient information. These include medical devices that record vital signs - a key area of concern as currently, most medical devices work autonomously, i.e. data from medical devices is (manually) transcribed and re-keyed into IT systems for reuse, or simply printed and saved on paper, adding to the scanning volumes.

Data Collection - hospital data systems hold a wealth of patient information, yet data entry is duplicated on a daily basis. Using EDRM in this area alone is delivering real benefits to secretarial staff and helps to improve data quality. Electronic Forms extend the functionality offered by current forms - to design and publish web based forms which contain intelligence in the form filling process. The completed forms are automatically captured and saved in EDRM where they can trigger workflows for post-capture processing. Furthermore, and specifically with eForms, data captured within forms is available as electronic and machine-readable data which does not require recognition and which can be re-used multiple times within back-end systems. This offers the potential for huge savings in administration and for automating clinical workflow processes.

4. Provide Comprehensive search and access functionality, including content search
EDRM supports searching by all document attributes, including patient
demographic data. Content (text) searching is also supported - images and electronic documents can be text recognised to generate searchable text, i.e. practitioners can find documents by searching for content within documents and make use of data analytics to help unlock information contained within patient records. Advances in recognition technologies are beginning to unlock the vast amount of information locked in scanned records and make this information available to practitioners. Using technology to add value to scanned records is enabling practitioners to access and view legacy case files in a manner consistent with how they access and view ongoing and new information, regardless of how the legacy records are digitised.

5. Tools for visualising data - Dashboards & Reporting
EDRM holds and has access to large amount of data - both patient-related data as well user and audit data. Dashboards provide visual interfaces to large data volumes, with the ability to drill down to specific data items and documents simply by clicking on an object. This will allow users to visualise predefined reports and quickly identify transactions of interest - high level reports will be provided to enable users to carry-out 'what-if' tasks. The reports and dashboards must be viewable online, printed, and exported.

6. Ensure that access to patient information can be controlled and audited
EDRM offers higher levels of security compared with paper records libraries. The security facilities support restrictions to sections within a patient’s casenote as well as restrictions to the entire casenote for designated patients. Thus, a user’s rights can include blocking access to any information held on specified patients. If access to a patient record is granted, further restrictions can be added to protect sensitive parts of a record, for example sexual health and mental records. All access is strictly controlled and audited. EDRM provides a comprehensive audit trail (accessible only to designated administrators as read only, i.e. tamper proof) which records all user activity including which documents were accessed and the operations carried out - e.g. viewing, modifications, etc.

7. Support processes for moving, sharing, and using patient information - Workflow
Patient data originates from many sources. EDRM is set up to capture this information and in some cases make it easier to collate this information which is held and managed in EDRM. Integrated Workflow makes it possible to proactively use this information by relaying it to those who need it, when they need it, for further action. Thus, data received from a PAS can be used to visually show a patient’s progress along the selected pathway while workflow will ensure that the relevant team is kept informed and provided with the necessary information to enable them to progress the patient’s care, measured against defined targets.

8. Ensure compliance with appropriate information governance guidelines
The combination of external threats (hackers, malicious damage, fire, theft, flooding, etc.) and legal obligations (Data Protection Act, Freedom of Information Act, and Civil Procedures rules on Electronic Discovery) surrounding the issue of storing and safeguarding crucial information applies to all businesses across all sectors. Data merely stored on computer hard drives or paper-based filing systems are particularly vulnerable to loss or destruction. Failure to manage electronic documents as formal corporate records will mean that organisations will not be compliant with government legislation. Compliance demands at the very least a high-level inventory of a company’s information assets and investment and careful application of available technology.

9. Support sharing of patient information across NHS organisations
EDRM is widely used for sharing patient information within a Trust, including geographically distributed sites. Sharing patient information across different NHS organisations is a key topic of interest, for example - patients can move around anywhere in the UK (and abroad) and may need treatment wherever they are. This has led to a number of initiatives and technology drivers to ensure that:
A. Patient information is readily accessible and not held within any proprietary system;
B. All required information for medical decisions is both correct and available to healthcare professionals.

Rather than enforce yet more standards on suppliers of IT in healthcare, standardisation in the way information is stored is being widely adopted, leading to Vendor Neutral Archiving (VNA). VNA-enabled patient information can be easily shared across medical specialties, organisations, and IT systems. It means enhanced patient safety with elimination of unsafe drug interaction. It means prepping AE in advance of a patient’s arrival when seconds are precious and less duplication of medical testing-as well as diminishing the cost and management of mountains of redundant healthcare data. A VNA breaks the connection between the application and the archive, freeing data. It provides a virtualised approach to information management with storage fully controlled by hospital IT - not the IT vendor.

The key message is that careful application of established EDRM technologies is delivering measurable improvements and benefits. These must be applied to address strategic requirements, rather than using EDRM as a short-term measure to solve paper problems. The technology is not rocket-science, but has evolved gradually as customer demands, interoperability, and web accessibility have evolved.

More info: www.ccubesolutions.com
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CASE STUDY: SHOOSMITHS

Shoosmiths is a major UK law firm with 10 offices across the UK. Their clients come from a diverse and exciting range of organisations - from large international corporates to smaller, ambitious, high growth businesses - whether private, public or UK plc. 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.

Shoosmiths had previously deployed the Hummingbird Enterprise DM v6 (DM6) document management system to create, manage and archive Client and Matter related content. The platform had been in place for over 6 years and required a complete overhaul to increase business productivity and efficiencies, and streamline working processes. The platform was only capable of handling document centric content management, with emails and other types of content managed elsewhere in mailboxes, local or shared drives.

Innovative and intuitive

The move to SharePoint has allowed legal firm Shoosmiths to move toward integrating workflows and DM into a client portal which will enhance client collaboration and optimise working practices.

Microsoft SharePoint was the platform of choice for Shoosmiths' new document management system. This was a leading-edge solution for Shoosmiths such that they had utilised learnings from other industries around document management rather than relying on incumbent providers within the legal niche. SharePoint's out-of-the-box features provide a broad set of document management capabilities that enable the organisation to:

- Store, organise and locate documents
- Ensure the consistency of documents
- Manage metadata for documents
- Help protect documents from unauthorised access or use

The platform also offers the flexibility required to plan for long-term updates. Shoosmiths were able to effectively take advantage of SharePoint's support for Remote Blob Storage (RBS) by using Metalogix's StoragePoint, reducing the SQL server database storage capacity requirements significantly, while allowing for a tiered storage management infrastructure.

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The solution provides an API and integration for SAP for provisioning of new Clients and Matters implemented with a combination of ClearPeople's Automatic Provisioning Manager and bespoke in-house components.

Because SharePoint works so differently to the incumbent DM6, the information architecture had to be completely redesigned. ClearPeople also defined a logical migration process and built a
CASE STUDY: SHOOSMITHS

A bespoke process was established to ensure that content was migrated and validated from one platform to the other. A basic approval process can be utilised that will allow the administrator to approve the creation of the new site or page. This tool and its accompanying processes have meant that document governance and consistency across the business is no longer an issue, despite the geographical spread of Shoosmiths’ offices.

The project also had to dovetail into Shoosmiths Windows XP migration and Office 2013 programme to ensure not only a fully integrated solution was delivered but also an integrated deployment programme with no room for error as the legacy solution was not compatible with the new desktop environment. It required ClearPeople and Shoosmiths’ team working in close co-operation.

In order to measure the success of the project it was important to establish clear KPIs from the start. Key objectives were to drive efficiency; encourage collaboration; retrieve and store documents more easily; provide consistency across offices; and standardise the way information is held and disseminated. Through analytics, employee surveys and focus groups, it was possible to identify if success factors had been met and more importantly to adapt the solution for future improvements.

The new system had a soft launch in the summer of 2014, with Shoosmiths’ IT team running a pilot for 6 months. Following this successful pilot, the first rollout of the system to a matter-based team went live in early 2015 and so far the implementation of the new Document Management System built on SharePoint has fulfilled Shoosmiths’ key objectives of driving efficiency within the team and allowing for more efficient collaboration across all of their offices. The solution has not only made the retrieval and storage of documents and emails intuitive and easy to administer meaning the time to find documents has been dramatically reduced, but it has also provided more consistency for the teams, standardising the way information is held and shared.

ClearPeople’s expertise in Document Management and effective migration plan enabled the transition period from DM6 to SharePoint to be as smooth as possible, allowing Shoosmiths to adopt a Business as Usual approach. The utilisation of their bespoke provisioning management tools has provided a better approach for Matter inception, giving individual users the capability to quickly set up new matter and non-matter sites very easily allowing for consistent filing and collaboration.

ClearPeople provided a more modern and maintainable information architecture. They also adapted the MacroView DMF (Document Management Framework) solution to match and improve on the previous functionality of the incumbent Document Management platform so that users were able to achieve the same user experience they were used to having without the need for formal training.

One of Shoosmiths senior partners commented “Two days in and the transformation is nothing short of amazing! I am so impressed with the new systems. The response times are massively improved and the integration of the applications is brilliant. They are so intuitive!” This inclusion of MacroView DMF as part of the overall solution also delivered tight integration between SharePoint, Word, Excel, PowerPoint, Adobe (PDF), the desktop and Outlook for efficient email management, through a simple but powerful and consistent interface.

It is also worth noting that Shoosmiths now operate a platform capable of dealing with any Client/Matter content types rather than just documents. In effect the platform is now ready to deliver Client/Matter workspaces, collaboration areas and much more. It also facilitates the next step in Shoosmiths’ digital strategy which integrates SharePoint workflows and document management into a client portal which will enhance client collaboration and optimise working practices.

Shane Scott, IS Director, Shoosmiths, concludes: “Throughout the project, the Shoosmiths and ClearPeople teams worked as one to develop and deploy an innovative solution which is a key element of Shoosmiths’ digital strategy, improving both internal efficiency and creating a platform for improving collaboration with and enhancing the services we provide to our clients.”

More info: www.clearpeople.com
One of the biggest phenomena of modern technology is Big Data. Even seeing the phrase written down makes it look big. As it is also generally capitalised this makes it look and sound even bigger. But how many organisations actually know what it means? And how big is big?

Over the last few years there have been plenty of definitions doing the rounds. Data however was already getting bigger in Big Data terms in 2001 when industry analyst Doug Laney described the "3Vs": volume, variety, and velocity-as the key "data management challenges" for enterprises. These are the same "3Vs" that have been used in the last few years by just about anyone attempting to define or describe Big Data.

DIFFICULT TO PROCESS
The Oxford English Dictionary (OED) defines Big Data as ‘data of a very large size, typically to the extent that its manipulation and management present significant logistical challenges’, while trusty Wikipedia defines Big Data as ‘an all-encompassing term for any collection of data sets so large and complex that it becomes difficult to process using on-hand data management tools or traditional data processing applications’. Right now in the world of research academia and also in life sciences I think many organisations are truly starting to get to grips with what Big Data really means and how big is big. Certainly scientists, research institutes and governments all over the world are starting to struggle to find reliable and long-term storage space for their ever increasing volumes of data.

I recently read two articles that explain how Big Data is having an impact on both life sciences and academia and the articles attempt to put some numbers around ‘how big is big’.

The first article in Inquisitr talks about how scientists are generating data about our genomes and the fact that they will soon be facing an acute shortage of...
THE DRIVERS MOTIVATING THE AMOUNT OF GENE SEQUENCING BEING CARRIED OUT THAT WILL GENERATE THIS HUGE VOLUME OF DATA WILL BRING ABOUT MASSIVE BENEFITS TO SCIENTISTS AND ULTIMATELY TO US IN TERMS OF OUR HEALTH. THAT’S BECAUSE THE SEQUENCING BRINGS IN THE ABILITY TO PREDICT AND DIAGNOSE ILLNESSES AND INHERITED CONDITIONS SO THE VALUE OF THIS DATA IS INCREDIBLY HIGH. EVEN MORE CRUCIALLY, THE COST OF PERFORMING THE SEQUENCING IS COMING DOWN AT A RAPID RATE.

storage space. The pace at which raw genome data is being generated is faster than even that for YouTube. The article goes on to say that companies like Google, Facebook and Twitter are taking this all in their stride simply because their businesses are all about helping us share our ‘small data’ while making it Big in the process. The numbers Google faces are eye watering – 100 petabytes (PB) of data a year from YouTube alone. That’s Big. And it all has to be on fast, expensive, always-on storage because their job is to serve data up immediately.

However, one organisation’s Big is another organisations’ really quite small. The article also says that next generation gene sequencing (NGS) will dwarf what we currently call Big Data and it will truly redefine what we mean by Big Data. By 2025 (that’s just ten years away) NGS activities will be generating anything up to 40 exabytes (EB) a year. That’s 40 times the YouTube figure.

The drivers motivating the amount of gene sequencing being carried out that will generate this huge volume of data will bring about massive benefits to scientists and ultimately to us in terms of our health. That’s because the sequencing brings in the ability to predict and diagnose illnesses and inherited conditions so the value of this data is incredibly high. Even more crucially, the cost of performing the sequencing is coming down at a rapid rate. So what is happening now is that rather than requesting a single test for a specific condition, clinicians are simply requesting the whole genome to be sequenced, as it is considered that the benefits outweigh the cost.

VALUE ADDED?
The other article, in The Guardian, asks a range of scientists in different fields about their use of (and contribution to) Big Data. One of the messages coming out of this article is that the instruments and techniques used in their specific fields are generating a lot of data, data that has far-reaching implications and use, and data that needs to be kept for the long-term. In fact, the value of the data may not be realised now but can and will at some point in the future. The scientists in the article are saying that they don’t have the full picture of the value of their data – all they know is that it is valuable.

So this leads me on to ask what do you do with something that is clearly valuable - with something that you can’t exactly value today, but that you just know is going to be more valuable tomorrow? The answer is that you keep it very, very safe. And if that something is data, where is this safe place? It’s in a data archive that is designed for economical long-term storage where the potential value of the data far outweighs the storage costs. In this way, the data will actually be archived and the value of it will actually be realised in the long-term.

My closing thought is that moving forward, the largest generators of data will be those who will want to get their genome sequenced. Over one billion people, mostly in developed countries, will soon demand to have their genome sequenced primarily because it opens up some amazing health solutions. That’s when the scientists will truly begin to worry about Big Data and appropriate storage facilities. That’s also when we will all start to get to grips with and truly understand how big ‘big’ really is.

More info: www.arkivum.com
Putting the clocks right

A new ECM system has helped HPI to improve the services it offers to car dealers, insurance firms and private buyers alike.

After a few slow years during the recession, UK used car sales suddenly accelerated in 2012, overtaking the new car market and placing huge demands on the company that helps dealers identify “clocked” vehicles and other scams.

HPI has been providing private car buyers, car dealers, finance houses and the insurance industry with key information on vehicles registered in the UK since 1938. Its collection of vehicle information enables anyone to check whether a vehicle has been stolen, written off or still has money owed to a finance company.

To help dealers comply with Consumer Protection Regulations and the Sale of Goods Act, HPI’s National Mileage Register (NMR) investigation service contacts previous owners to verify mileage on a vehicle, identifying when a vehicle has been clocked - for example, displays false mileage typically lower than it should be. The practice had been on the wane, but the advent of digital mileage recorders made it easier for unscrupulous sellers to manipulate the reading, and in recent years the downward trend has reversed.

HPI’s process is essential in order to give consumers faith in the motor trade and saves honest traders huge amounts of hassle and red tape. One in three cars it checks is found to have a discrepancy, with a quarter having outstanding finance and one in twenty an issue with their claimed mileage. The firm’s checks identify 30 stolen vehicles and 650 insurance write-offs every day.

DATA OVERTAKES CAPACITY

The UK used car market hit a record high of £38.1 billion in terms of value in 2012, outpacing the total new car market by £5.8bn. As this coincided with a rise in clocked vehicles, for HPI these two developments created a growing database and a rapid increase in the number of
requests for information.

With managing documents key to the company's business, the process of updating records had already been digitised, but its existing enterprise document management (EDM) system was proving unsatisfactory. As a result, there was a backlog of work, and the firm was struggling to provide the quick turnaround its customers demanded.

"Selling a car is a fast-moving business and dealers can lose a sale if there are delays in the process," said Paul Fitzsimmons, HPI National Mileage Register team manager. To make matters worse, HPI's ECM contract was based on digitising a set number of documents per year, and the company had reached its upper limit early. We had to go and beg for a few thousand more, and look at upgrading to the next level of contract, which was far more than we needed," Fitzsimmons said.

The market upturn of 2012 was a perfect opportunity for HPI but if it was to take advantage of the increased business it had to improve on its turnaround times, while dealing with increased workload and improving its efficiency.

**A BETTER RIDE**

HPI started looking around for a new enterprise content management solution and found OnBase by Hyland.

Fitzsimmons said: 'We had a look at two or three different options and OnBase seemed to suit all out needs, plus the sales person was local to us and easy to deal with directly, so we cut out a layer of the sales process.

'It integrates really well with our underlying business systems, because we have a framework that needs to be populated with data and OnBase does that really well. The other ECM system did it too, but OnBase seems to make it more simple and elegant. As an end user who doesn't really understand the intricate detail the software, that is what you really want.'

In addition, OnBase helped HPI move away from its previous vendor's pricing model, where fee levels depended on document volumes - an unsustainable arrangement for a growing business. And OnBase could be tailored and integrated ‘out-of-the-box’, so it was implemented with minimal disruption to the team.

HPI agents also appreciated the familiarity of the system, with its Windows look and feel. They became proficient quickly, without any major technical or cultural adjustments.

Intuitive and easy to use, training periods were minimal and with a dedicated support team providing a rapid response to any issues, there was little risk of downtime.

"From the start it was clear that OnBase would offer more of a partnership than a vendor/supplier relationship, providing round-the-clock support with a dedicated point of contact to resolve any issues immediately," said Fitzsimmons.

'This alleviates concerns about prolonged downtime affecting our customer service. On another positive note, this close, ongoing relationship ensures that we can continue to enhance our service in line with further business growth.”

While introducing the new system, HPI received direct support from both OnBase's agents in the UK, and its engineering team in the US.

Fitzsimmons added: 'Now, we know the support is there, but - touch wood - we haven't needed it much. It just works really well.'

**HOLDING ITS VALUE**

Since moving to OnBase, HPI has doubled productivity in terms of its document processing. The company receives information in formal documents from agencies like the DVLA and thousands of garages providing MOT and service documents that provide a clear indication of a car's mileage on a particular date. It even works with private owners, and some of the information it receives can be in the form of hand-written letters. All of this has to be digitised, and OnBase generates bar codes to help categorise and make sense of the huge numbers of files a quickly as possible.

HPI now saves in excess of 780 hours of manual processing per year. OnBase automatically captures all relevant data from the thousands of documents and images received weekly, verifies the information, classifies and indexes and updates HPI's other business systems in real time.

**GEARING UP FOR GROWTH**

HPI works with a very wide variety of clients across the car dealership spectrum, from small to major chains, and directly with consumers who want to check a car they are looking to buy.

Five out of six used car dealers work with HPI, but it must remain both fast and reliable to stay in pole position and accelerate along with the wider market.

OnBase manages volume easily with unlimited access to scanning and process automation, allowing HPI to take on increased business without additional overhead. Speed is important for car dealers, who don't want to lose a sale through excessive hesitation, but reliability is just as important.

Fitzsimmons said: "Diligently checking the right documents is absolutely critical. Our work forms the basis of a trader's defence should anything go wrong further down the road. If we get something wrong it could cost them in terms of reputation and potentially a court case. No dealer wants to see cars being brought back with mileage or finance issues, and we charge our customers for that peace of mind.”

That reliability is now visible for all to see. With OnBase, there are no more long paper trails going back and forth between HPI, regulatory bodies such as the DVLA and previous owners of the vehicles who were asked to verify mileage figures. All information is in OnBase, with full audit trails. And if a customer calls to verify information, because all data is held centrally and is easy to access and fast to retrieve, HPI agents can provide almost instant responses.

More info: [www.onbase.com](http://www.onbase.com)
The combination of razor-thin margins, heightened compliance and security requirements, and ever-increasing customer service requirements are putting a strain on the document processing operations of financial services organisations such as banks, insurers, mortgage lenders and brokerage firms. Complicating matters is the explosion of information that must be managed efficiently and securely - growing at an average of 35 percent annually for banks, according to a 2014 study by Aberdeen Group - and the increasingly diverse channels through which paper and electronic documents arrive.

Fifty six percent of U.S businesses polled in a recent InfoTrends study said they expect an increase in the amount of paper and e-documents in their business processes over the next 12 to 24 months. As a result, financial services organisations that rely on manual processes in their document workflows are reaching their breaking point.

This article aims to explain how intelligent document recognition brings substantial improvements to financial process workflows, and provides real-world examples of how financial companies achieve these benefits. An intelligent document recognition solution performs three operational functions:

**Classification:** Intelligent document recognition interprets content and patterns on documents to automatically classify paper and electronic documents into different document types, and determine the beginning and end of a document. For instance, intelligent document recognition can apply optical character recognition (OCR) technology to an entire document to capture information and compare it with data stored in lookup tables about known document types. The technology can also classify documents based on images contained on a document such as a logo, or based on text such as a description of a field (“invoice amount”). Compared to old template- based solutions for document classification, this content and pattern-based approach to document classification is easier to setup and manage, and delivers better results. Knowing that the document is a lending form, customer correspondence or a survey report equates to higher levels of data extraction accuracy in the next step.

**Extraction:** Once a document is classified, intelligent document recognition extracts important data from anywhere on the document, to start a business process and/or to populate a database in a downstream application such as loan origination, ERP or remittance processing. This increases accuracy by identifying patterns and data formats. For instance, if the term ‘loan number’ is identified, intelligent document recognition will automatically search nearby and extract the loan numbers. Rules for data extraction can be flexibly configured based on unique business requirements.

**Release:** Intelligent document recognition solutions export data and images (such as searchable PDFs) to any content management, workflow, repository or downstream application (including financial applications, customer relationship management and enterprise resource planning systems). Exported information is immediately available for use, enabling workers to quickly take action.

Together, these capabilities automate the manual steps found in a typical document processing environment. Intelligent document recognition solutions are also content-driven, meaning they capture content from any paper or electronic document, from any source, including:

- Centralised batch scanning
- Remote browser-based capture
- Ad-hoc desktop capture
- Emails

Five ways to transform financial services applications

Dan Lucarini of ibml suggests five ‘transformative benefits’ of intelligent document recognition for banks and financial institutions
MARKET FOCUS: BANKING & FINANCE

- Fax servers
- Networked multi-function peripheral (MFP) capture
- Mobile devices

This is a critical capability considering that financial services organisations receive paper and electronic documents from more channels than ever, and analysts predict that document volumes will continue to grow.

FIVE TRANSFORMATIVE BENEFITS

There are five ways that intelligent document recognition transforms financial services applications:

1. Reduced operational expense:
Intelligent document recognition solutions significantly reduce the paper handling and manual data entry common in many financial services applications. For instance, one of the top 100 banks in the U.S. achieved its anticipated productivity improvements within only six months of implementing an intelligent document recognition solution.

The bank’s old document imaging system required a full-time equivalent (FTE) employee to do nothing but scan consumer loan documents for 9 hours each business day. With the intelligent document recognition solution, it now takes the same individual only 3 hours daily to scan all of the bank’s consumer, as well as commercial, loan documents.

Additionally, the bank reduced the labour required to prep documents and generate slip sheets from 1.75 FTEs to a fraction of an FTE.

2. Streamlined document preparation:
Deploying an intelligent document recognition solution enabled one bank to reduce the time required to prepare documents and generate slip sheets from an average of 30 minutes to less than a minute. Employees no longer need to physically sort document types and create a single-use ‘slip sheet’ for every document in the lending file. The new solution uses only two slip sheets for an entire lending file. The intelligent document recognition solution automatically classifies and separates documents from within batches, extracts data elements from various document types, and routes document images and the extracted data to the bank’s back-end document management repository.

Similarly, a financial services company in the pre-funded loan business no longer needs to insert separator sheets between each document as a result of deploying an intelligent document recognition solution. The new solution automatically determines the start of a new document. Separator sheets are now used only in the rare event where a document is missing, which also assists with business rule verification later in the processing workflow. Eliminating the vast majority of separator sheets reduces the cost of paper, and eliminates the time and labour cost spent pulling separator sheets out of scanned batches.

3. Accelerated document processing cycle times:
Intelligent document recognition solutions can reduce the time required to process documents from several days to just a few minutes. Within one month of deploying an intelligent document recognition solution, a financial services company eliminated a 3.5 month backlog of pre-funded loans that needed to be processed. The company now scans all of its loan documents within 24 hours of their purchase. The company also processes multiple loan packages mingled in the same capture workflow; the intelligent document recognition solution reads a barcode on the cover page of individual loan packages to automatically separate each package into a batch. This helps the company make quicker decisions on loans.

Similarly deploying an intelligent document recognition solution has enabled another company to transfer loan file images downstream in a fraction of the time it previously took with the old scanning system; this enables knowledge workers to take much faster action on documents.

4. Help meeting compliance deadlines:
Audit and regulatory requirements place a tremendous burden on financial services operations. For instance, lenders face hefty fines and penalties for not providing borrowers with accurate closing information in a timely manner. One of the 25 largest banks in the United States has replaced a slow loan document review process with an intelligent document recognition solution to help meet its compliance deadlines for mortgage loans.

In the past, the bank staff had to read each document and manually compare the many line items to the bank’s loan origination database, and send the document back to the closing agent. It was not uncommon for this process to repeat multiple times over several days. With the new solution, the loan documents are submitted to the bank via fax or e-mail, and then the software automatically opens the document, extracts line-item information and validates it against the data in the bank’s loan origination system. The automation has reduced the time it takes for the bank to complete the loan closing package.

5. Enhanced value:
Deploying an intelligent document recognition solution has enabled one bank to provide easier and more accurate access to archived loan documents and data. They can now capture much more information from loan files, including the dollar amount, date, address, and other descriptive fields. The bank uses this information to index the files. The additional information also could prove invaluable when examiners review the bank’s loan portfolio.

THE BOTTOM LINE

Intelligent document recognition solutions result in faster document workflows with fewer manual tasks and less people required to do them, put valuable information securely into the hands of front-line employees at a faster pace, and help to meet deadlines for compliance. More importantly they help financial services organisations meet the challenges of razor-thin margins, heightened security and compliance requirements, and rising customer service demands.

More info: www.ibml.com
The ninth annual DM Awards is now rapidly-approaching - the numbers of initial nominations have already broken previous records and that means we are probably on course for our biggest and brightest awards night so far. The ceremony will take place once again at London’s glitzy Hotel Russell, on October 22nd.

Initial nominations are now closed: is your favoured supplier among our finalists?

Nominations will have closed by the time you read this, so the next step is to visit the website (see below) and peruse our list of finalists. If one of your suppliers is on there - or even your own company, as we have no rules against a little self-promotion so long as you stay within the rules! - then cast your vote, and by doing so become part of the industry's biggest and longest-running awards event. This year we have introduced a Mobile Capture Product of the Year award to highlight the developments in this fast growing area of professional scanners available in the document management marketplace, as well as an Accounts Payable/invoicing category.

More info: www.dmawards.com

DM Awards 2015 - vote now!

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- MOBILE CAPTURE PRODUCT OF THE YEAR
- RECORDS MANAGEMENT PRODUCT OF THE YEAR
- WORKFLOW/BPM PRODUCT OF THE YEAR
- HARDWARE PRODUCT OF THE YEAR
- SOFTWARE PRODUCT OF THE YEAR
- PRODUCT OF THE YEAR
- EDITOR’S CHOICE (NOT OPEN FOR PUBLIC VOTE)

BUSINESSES:
- BPO/OUTSOURCING/BUREAU BUSINESS OF THE YEAR
- CHANNEL PARTNER OF THE YEAR
- DATA DESTRUCTION & SHREDDING
- SERVICE/SUPPORT COMPANY OF THE YEAR
- COMPANY OF THE YEAR

PROJECTS:
- PROJECT OF THE YEAR - PUBLIC SECTOR
- PROJECT OF THE YEAR - PRIVATE SECTOR

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