aiim eBook

Content Management in 2021 and Beyond



In Partnership with

Adlib

asg technologies®

docufree

ELO Digital Office

ImageSource®

ITEXT

Thank You to Our Underwriters

Adlib Software
215-3228 South Service Road
Burlington, ON L7N 3H8
Canada
www.adlibsoftware.com

ASG Technologies
708 Goodlette Road North
Naples, FL 4102
United States
www.asg.com

Docufree
1175 Northmeadow Parkway
Suite 140
Roswell, GA 30076
United States
www.docufree.com

ELO Digital Office USA
50 Milk Street, 16th Floor
Boston, MA 02109
United States
www.elo.com

ImageSource
612 5th Ave SW
Olympia, WA 98501
United States
www.imagesourceinc.com

iText Software
AA Tower
Technologiepark-Zwijnaarde 122
9052 Zwijnaarde
Belgium
www.itextpdf.com

Forward

For several years, members of the AIIM community will have heard us say that every organization is on – or should be on – a Digital Transformation journey. And that journey hasn't stopped in the wake of COVID. In fact, you could easily say that the pace of the journey has accelerated. Evidence of further disruptions and disruptors is all around us.

Our first instinct in a pandemic-induced recession is to get back to basics and circle the wagons so that we can maintain operational efficiency, sales effectiveness, and cost reduction. But, we can't wait around for these things to be achieved because OUR customers expect products and services to be delivered faster than ever before. (Nothing screams "pandemic" like customer demand for convenience, availability, and speed in providing necessities.)

On the one hand, we are focused on optimizing business productivity. On the other hand, we are realizing that we need a modernized approach and a modernized information ecosystem if we are going to meet changing customer demands and the pace of change.

It's clear that we need scale and agility, and we need it now. We need the vision that Intelligent Information and Content Management have promised for some time so that remote workers can:

- create, capture, and share the information they need to do their job
- safely access all business-critical information regardless of where it lives
- extract insight from information for decision-making and to seamlessly deliver content in context
- automate the governance of growing volumes of information including customer personal data

These are the key tenets of the Intelligent Information Management practice. We have illustrated them in an interactive infographic available to you at this link.



Before you proceed with the rest of this publication, you might want to familiarize yourself with this tool. Refer back to it often as a guide to your own modernization efforts.

In the chapters that follow, we'll take a look at these capabilities to see how changing business drivers are impacting their application. We'll also learn how your peers in a variety of industries are pivoting to meet these new challenges and rising to new levels of excellence.

Happy reading!



Peggy Winton, CIP
President & CEO
AIIM



Competitive Advantage in the New Norm – The Ability to Change

By Kevin Craine, AIIM

The workplace in 2021 will demand a different set of skills. Now more than ever, organizations need to embrace disruption as a springboard for competitive advantage and adopt new ways of working that invigorate organizational performance.

The needed capabilities include the ability to leverage remote work as an advantage, increase information agility, and drive business growth despite these challenging times.

But making the transition isn't just about the technology involved; success requires the ability to effectively manage change itself.

> *Organizations that are good at managing change, and effectively adopting the technologies and techniques needed to transform, will be the ones who gain competitive advantage in the new norm.*

The challenge of change is one that I frequently hear from AIIM members. Managing change is often a more difficult task than even the most complicated technology implementation. It is tempting to presume that if we can get everybody trained on the new system and send some memos that everyone will get on board, but that usually doesn't happen. It often comes down to how well we engage with users and manage from a people point of view.

Changing Advantage

Organizations that are good at managing change, and effectively adopting the technologies and techniques needed to transform, will be the ones who gain competitive advantage in the new norm. Trouble is, according to global consulting firm BCG, about 75% of all change initiatives don't deliver the hoped-for results. But that's about to change, and there is opportunity for those organizations willing to "lean-in" to the challenge of change management.

The dynamic nature of business in the new norm will require organizations to build capabilities for ongoing large-scale change – so they can keep up with the competition. Even before COVID-19, businesses needed a reset; a new mindset for embracing disruption and change. Now, in the midst of a pandemic and historic economic disorder, most leaders recognize how critical a high-performance culture is to their organization's continued success. Be ready.

Tips for Managing Change

How can you better bring about change? Consider these best practices:

- **Dedicate sufficient resources to effect the change.** Set aside proper time and resources to deal with the people who are targets of change. Change is inevitable yet everybody resists it. As a result, managing the human aspects requires the same level of attention and importance that you would apply to technology.
- **Strong executive sponsorship is critical to any change initiative.** The importance of executive sponsorship and involvement cannot be overstated – their unwavering support can make the difference between success and failure. Your sponsor must clearly understand what is needed in order to make the change successful. It is your job to communicate the resources that you need, the barriers that stand in your way, and the people that must be enlisted in the change initiative.
- **Work to overcome cultural habits.** "We've always done it this way" is a hard habit to break. You may need to change cultural history of how change gets done. First consider whether or not improvements are not implemented because there has not been a clear understanding of what is needed to be changed in the first place and why.
- **Cultivate support through skillful, sensitive interactions.** Learn to "speak the language" that will connect with each individual who must support the change. Be careful to not get caught up in technical jargon. Instead, speak to their frame of reference and in a dialect that will resonate with their needs. Be prepared to discuss the right things at the right times.

Moving Forward

The future of work is today. It's no longer business-as-usual; new ways of working are needed. Organizations that embrace the disruption and leverage the ability to change as an advantage, not as a road block, will be the ones that come out ahead. Look for providers and partners with the right mix of expertise, capability, and vision to make the most of your efforts build new competitive advantage.



What's the most common reason for an information management project to fail?

Would you be surprised to hear that it isn't the technical implementation itself, but issues with user adoption and resistance to change?

Don't let this happen to you! Learn the practice of change management – the people side of organizational change - to ensure the success of your next project with AIIM's Confident Change Management for the Information Professional training course. This course has been designed to teach you all of the aspects of change management and the skills necessary to implement large-scale change management efforts.



Click here to learn more and to start your Change Management journey.

How COVID-19 Has Moved Digital Transformation to Fast-Forward

By Adlib Software

Now there's more reason than ever to fast-track digital transformation.



Adlib

The pandemic has changed digital transformation in two critical ways: it has shown us that full unrestricted access to all enterprise data is needed to respond to sudden drastic change, and that going part-way into business process transformation isn't enough. Achieving true business readiness, agility, and resilience requires commitment.

Digital transformation has been a disappointment to many enterprises.

As COVID-19 came over the hill, digital transformation had been faltering. Many enterprises investing heavily have been disappointed. According to Wipro Digital[1] fully half of senior executives believe that their digital transformation initiatives aren't working. One in five say it's a waste of time.

The problem is dark data.

Lift-and-shift is when data – good, bad, unknown – is pulled from a legacy system and simply transferred to a much more expensive system. This is like a new car with the same bad driver. Most big data and AI projects have been aimed at efficiencies like streamlining, simplifying, and condensing. While some improvements can be made, without full access to clean, relevant data, they can't achieve the higher value benefits of adaptability, resiliency, and the unlocking of deep digital insights. In short, true business readiness and agility.

The other problem is a mountain of unstructured data.

Most enterprises have ignored their unstructured data. PDFs. Emails. Word docs. CADs. "Unintelligent" servers and repositories. Almost unbelievably, 80% of all enterprise data is unstructured. And that's growing by 55% to 60% per year[2]. No matter how expensive your digital automation program, if you only ever have a partial picture, it will not do the job. You won't be ready.

COVID-19 highlighted three big ongoing functions that every enterprise needs to focus on:

(1) Digital Transition has to go all the way

When you aim digital transition primarily at operational improvements, you are never fully prepared for major surprises. A good example: COVID-19 has dramatically accelerated click-and-get expectations in both B2C and B2B. The model of preparedness is Amazon. It was ready for the surprise. When COVID-19 came, Amazon had the platform, the automation infrastructure, and the deep, rich data to drive profits, and share value through the roof. Many other enterprises did not, and they have suffered.

(2) Regulations will inhibit emergency response unless you are fully prepared

Here's a not-so-imaginary scenario: As regulations continue to proliferate and require protracted compliance processes, a global pandemic explodes. Vital medicines and equipment have to get to market in one-fifth the normal time. Regulatory timelines can be accelerated, but innovators still have to have all required data that regulators demand. If some of it is buried in unstructured files, there's no time to find it manually and the products don't get to market. Community health declines. Global health declines.

(3) When everybody goes home, privacy goes out the door

COVID-19 sent the workforce home. While efficiency seems to have held, the gaps in data security are obvious. Companies have scrambled to implement conventional security measures. But what about Personal Identifiable Information (PII)? Few enterprises have it fully tied down with data markers that can find and track sensitive information wherever it moves. Again, COVID-19 showed the holes. Many of those holes remain unfilled.



Intelligent data is your next move. Fast forward.

COVID-19 showed us all the vital importance of readiness, and thus, the obvious importance of transforming unstructured data into useable, applicable, secured workflows. To unlock insights. To respond to customers. To have all ducks lined up in case of surprises.

The ongoing ROI of making all content intelligent is gratifyingly large because you are unlocking the power of an asset you already own. Adlib is proven leader in content intelligence solutions that make our customers more responsive and resilient while driving meaningful ROI.

[1] Wipro Digital – New Survey Highlights Leadership Crisis in Digital Transformation

[2] Datamation – structured data vs. unstructured data

Adlib

About Adlib

Our purpose is to create better data that amplifies human potential and maximizes business performance. How do we get there? Our content intelligence and automation solutions make it easy to discover, standardize, classify, extract, and leverage clean structured data from complex unstructured documents. In doing so, our global customers reduce risk, simplify compliance, automate processes, and enter a whole new level of performance.

For more information, contact us at
info@adlibsoftware.com
or visit
adlibsoftware.com.





COVID-19, Content Services, and The Cloud

By ASG Technologies

Flexibility and adaptability are key to controlling the consequences of the COVID-19 crisis. As organizations are embracing new ways of working, accelerating digital transformation and strengthening business continuity plans, many are fast-tracking their move to the cloud. The cloud is providing significant benefits for content services and is supporting the relief effort by ensuring workers can access essential business information, while enabling secure real-time collaboration for the masses working from home.

Why is the cloud the future of content services? The advantages are numerous. Using a cloud-based content services platform reduces the resources burden on IT by leveraging the provider's infrastructure expertise, while optimizing security, compliance, and risk management. For the business, content services in the cloud means getting the right content into the right hands at the right time, regardless of repository. By improving user access, the organization also improves productivity and decision-making, while providing better customer experiences.

Despite the compelling opportunities, it is not realistic to assume that all organizations can completely replace their current in-house content repositories overnight for a cloud-only approach. Therefore, many organizations are adopting a hybrid approach that leverages the best of both worlds in what could be called a mash-up of on-premises infrastructure, private cloud services, and a public cloud.

The hybrid cloud has proven to be especially valuable as organizations have had to adapt immediately to remote ways of working. It allows data and content to move between private repositories and public clouds in a more accommodating way as business needs and processes change – ultimately giving the organization greater flexibility and more options for deployment and use. Organizations that deploy a hybrid model also have a lower total cost of ownership as it eliminates the need for substantial infrastructural requirements.

Thriving in the post-COVID world requires organizations to explore all opportunities to become adaptable by driving down costs, minimizing risks, and accelerating digital transformation. As a result, enterprises will continue to prioritize the cloud as a platform for content centric process innovation and improved organizational performance providing security and compliance. Organizations stalled in migration inactivity will be left behind.

About ASG Technologies

ASG Technologies is an award-winning, industry-recognized, and analyst-verified global software company providing the only integrated platform and flexible end-to-end solution for the information-powered enterprise. ASG's Information Management solutions capture, manage, govern, and enable companies to understand and support all types of information assets (structured and unstructured) and stay compliant. ASG's IT Systems Management solutions ensure that the systems and infrastructure supporting that information lifecycle are always available and performing as expected. ASG has over 3,500 customers worldwide in top vertical markets including Financial Services, Healthcare, Insurance, and Government.

Visit us at:

www.asg.com





The First Step to Effective Working from Home: Digitize Your Paper Documents

By Jesse Wilkins, CIP, AIIM

Many of us find ourselves working from home – often rather suddenly and unexpectedly. The good news is that the technology needed for effective working from home exists and is generally mature – though some providers have found that the sudden surge in volume can cause issues with particular solutions or capabilities.

But there's a significant issue that prevents many employees from being as effective as they possibly could be in their home offices: paper. For many organizations, your paper documents are at the office where you can't get to them. Now what?

What Are the Benefits of a Digital Workplace?

One of the core tenets of intelligent information management is to "digitize everything that moves." This doesn't necessarily mean scan everything. But it does mean that organizations should scan documents that are actively used to support the business – and keep born-digital documents digital whenever possible.

Organizations that transition to a more digital-based way of working realize a number of additional benefits.

- **Remote Access:** Digital documents can be made available to authorized users wherever they are, whenever they need them, and quite likely on whatever device they want to use.
- **Simultaneous Access:** In the paper paradigm, if a file is on one person's desk, another person can't readily access it and may not even know where it is to ask for it. Multiple people can look at a digital document or file simultaneously, and with some tools, even edit the same document simultaneously.
- **Faster Access:** Getting up, walking to the file cabinet or file room or waiting on the courier from offsite storage, getting back to your desk, using the document, and returning it to its storage can

take up a ton of time. Properly stored and managed digital documents, in contrast, can be found and accessed almost instantly. This, in turn, improves the efficiency of customer service, application processing, or whatever the process in question is designed to do.

- **Improved Security:** Security is often better for digital documents: access controls can provide flexibility and ensure only authorized users can access a particular document, and audit trails keep a record of who accessed what in which fashion.
- **No More Lost Files:** It's harder to lose or misfile a digital document compared to a physical one – and easier to find if there is an issue with, say, the name or customer ID because you can search multiple ways.
- **Space Savings:** This is a bit of a double-edged sword – paper documents tend to be managed more effectively than digital. But many organizations keep paper files onsite, taking up valuable real estate. What happens when you run out of space and need to lease additional space? A solution is to destroy what you can and scan the rest. It's a complex and expensive project, but can result in significant cost savings over time.
- **Disaster Recovery:** It's pretty straightforward, and relatively inexpensive, to make backup copies of digital files - as compared to thousands or millions of paper files. In fact, you could make multiple copies of critical files and store them in offsite locations.



Pictured: Steve Hubka - Winner of the AIIM "Messiest Desk Contest"
Photo Credit: Brian Pillard, Records Manager, Lancaster County Nebraska.

"But the Law Requires Us to Keep Paper!"

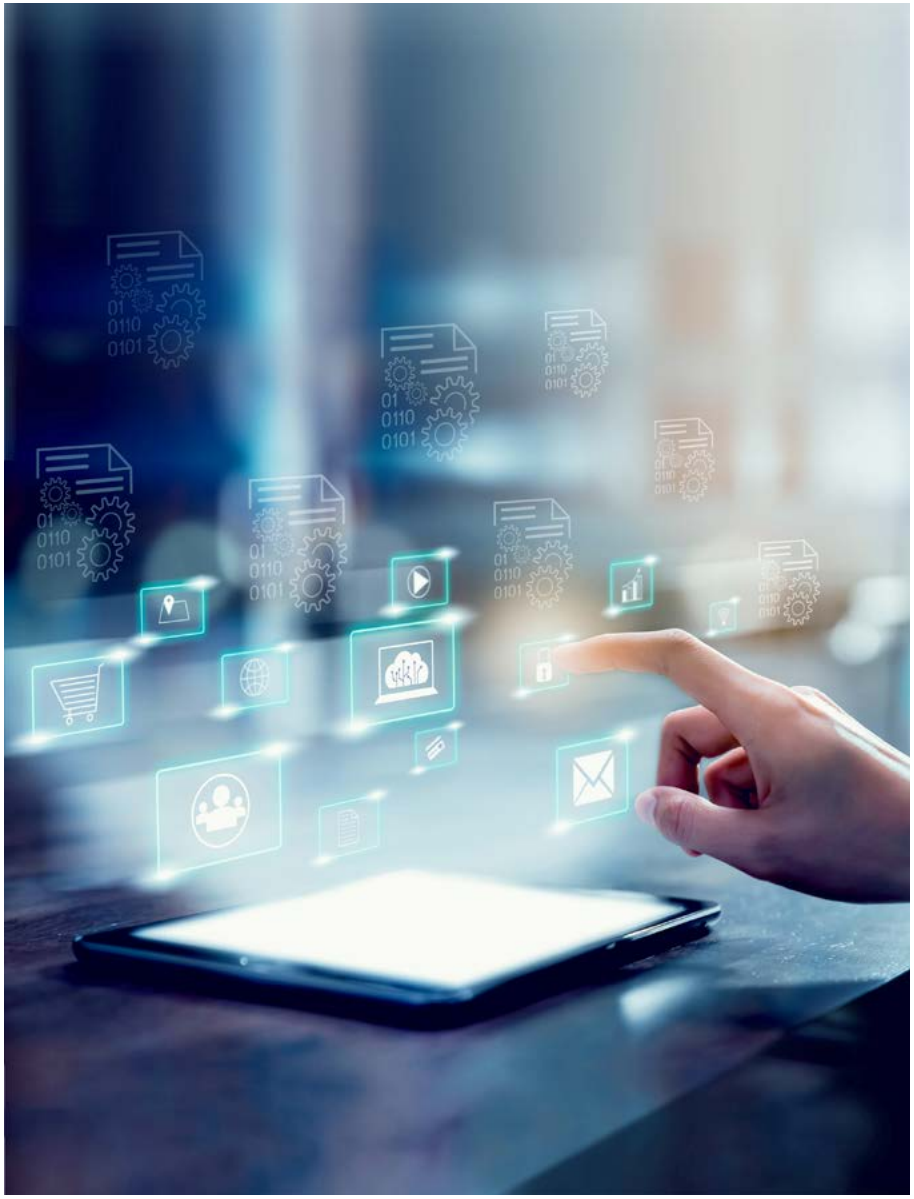
Some of you have been thinking this entire time, "But the law requires us to keep a hard copy!" Or a human-readable version. Or a wet-ink signature. "So, what about those?"

Well, you should determine whether that's actually true. Often that was true, but then the law changed, and the organization didn't realize it. Or it could be that the organization is simply more comfortable keeping the wet-ink-signed paper.

Just because you have to keep the hard copy original doesn't mean you can't digitize it and use that as your day-to-day copy. There may be some legal or regulatory nuances you have to comply with, so check with your legal department. But as it stands right now, anything you have in paper format, in a file cabinet, in your locked and empty office, is inaccessible anyway, which can also cause issues.

From Digitization – to Digitalization

The better approach is still to "digitalize" your core business processes – that is, keep born-digital documents digital, and leverage people, processes, and technology to streamline and automate how work gets done. But if you have legacy paper documents that are still being accessed regularly, you should definitely consider scanning them. And if you regularly receive paper documents, you should scan them as early as possible in the process so you're processing them digitally, which will be faster and cheaper in the long run.





What You Need to Know About Digital Mailrooms

By Docufree

Pre-pandemic, we saw a business landscape slowly moving from a heavy, document-centric workstyle to one that was more data centric. However, COVID-19 fast-tracked that movement.

Our "new world of work" now requires company information to be as mobile as its workforce.

A Hybrid Operational Reality

Sound familiar? Our company has people working from home several days a week, only coming into the office part time. However, our physical mail is delivered daily to our business address, and it's impossible to have relevant documents redirected to employees' home offices.

You are among the ranks of companies trapped in a hybrid reality of document-to-data transition.

The underlying problem. An exorbitant number of documents still in paper form. Companies – large and small – have business-essential mailstreams coming through the U.S. Postal Service in physical form that have to be captured; data extrapolated; and then married with electronic counterparts. If your company is stuck in manual, then this process can be a logistical nightmare – even with an army of employees with daily orders to open, copy, scan, send, and repeat.

A digital mailroom can help your company overcome these challenges and begin to transition your operations to include more data-centric workflows that have become a necessity in today's remote-work world.

Debunking Digital Mailroom Misperceptions

While interest in digital mailrooms has certainly been accelerated by the pandemic, misperceptions exist that might impede companies from taking action. We dispel some of those digital mailroom myths here:

- **Digital mailrooms are for small businesses.** Many companies view digital mailrooms as virtual or online access to postal mail, more geared toward smaller businesses. They don't realize a digital mailroom service can be used to manage both inbound and outbound mail throughout the entire enterprise, whether information is in physical or electronic format.

- **My company receives too much physical mail.** Facility-management teams are often among the last to see the feasibility and benefit of eliminating a physical mailroom that might handle thousands of pieces of mail in a month. Digital mailroom solutions exist in the marketplace today that are purpose-built to easily scale enough to handle that type volume.
- **Scan and capture software is enough.** Document scan and capture addresses only one portion of the total digital mailroom experience. Beyond this, the question becomes how quickly, seamlessly, and accurately can that information be incorporated into organizational workflows and integrated with enterprise applications?
- **Implementation takes too long and involves too many moving parts.** Previously, companies had to involve multiple vendors offering piece-and-part technologies to build full digital mailroom capabilities. Modern digital mailroom services are built on a secure cloud platform and require no capital expenditures, eliminating your most costly transactions – those mired in paper!

Make Information as Mobile as Your Workforce

The reality of enterprise-wide digital mailrooms is here. There are innovative digital mailroom services available that can be quickly implemented at scale and handle very large volumes of both physical and electronic information – if you choose the right provider.

Isn't it time you make your information as mobile as your workforce?

docufree

About Docufree

Docufree's Digital Mailroom Automation service captures incoming documents and data from every source, intelligently distributes it across organizations and provides faster access to the information workforces need, when and where they need it.

Contact Docufree today for an initial assessment as a first step to taking your company's mailroom digital:

go.docufree.com/digital-mail



Now More Than Ever, Contract Management Is a Business Lifeline

By ELO Digital Office USA

COVID-19 may have a long-lasting impact on time-honored business practices and events – from sealing a deal with a handshake, to large venue conventions, to the nine-to-five office job. Businesses that are surviving the pandemic and teed-up for continued success have pivoted to new ways of doing business: the elbow bump, virtual conferences, and work-from-home/anywhere models. These times have underscored the value that digital content management brings to every aspect of the new normal in which contract management has emerged as a lifeline for many companies. Consider this: some businesses have closed or suspended operations, resulting in companies challenged to meet their contractual obligations. You cannot underestimate the importance of being able to take control of all types of contracts across their entire lifecycle.

Industry research indicates that COVID-19 has accelerated digital technology and its adoption by several years. Digital/virtual ways of doing business abound, and the market is flooded with contract management software. What should you look for in a system that will enable you to manage, create, negotiate, sign, renew, analyze, and securely store and retrieve contracts from a single platform?

Consider a contract management solution that:

- **is user-friendly and easy to understand** with a self-explanatory user interface
- **meets legal and regulatory requirements**, enabling compliant contracts that minimize risk
- **supports heterogeneous contract landscapes** in purchasing
- **offers a full-text search function**
- **provides a filter function** to narrow down contract-relevant information
- **processes scanned documents** using OCR text recognition
- **applies data from standard Office programs**
- **includes version control**, so you are always accessing the latest version

- **allows flexible, customizable date and deadline management** with a reminder function
- **features a workflow function** that notifies staff by email of expiring conditions
- **defines contracts as framework contracts** so that all subcontracts can be identified easily
- **offers flexible user administration** with a permissions structure to ensure only authorized employees or departments can access data
- **keeps supplier and customer data up to date** with an interface to the ERP system



A future-proof contract management system, which must deliver these necessary capabilities, is connected to an equally future-proof ECM system. ELO Digital Office provides the ECM backbone on which to run your contract management and more.

To learn more, email info-usa@elo.com.

ELO Digital Office

About ELO

ELO Digital Office provides innovative information management solutions for organizations of all sizes and industries. The ELO ECM Suite, comprised of ELOprofessional and ELOenterprise, provides an electronic and secure way to easily capture, archive, and manage business documents and information – paper-based and digital. Compatible with leading ERP systems, these solutions are complemented by a suite of business apps to manage activities such as contracts, invoicing, email, and HR.

To learn more visit:

www.elo.com



How Businesses Can Learn from My Daughter's Distance Learning

By Jesse Wilkins, CIP, AIIM

Like many other areas around the country and around the world, my daughter's school has joined the "learn from home" movement. I've been a teleworker for more than 16 years so we already have the technology infrastructure required. But it's come with more than a few challenges, some of which are the same types of information management challenges we all struggle with at times in the world of business.

Three Common Information Management Business Issues That Can Also Affect Distance Learning

What I found to be very interesting is the commonality between the issues businesses experience as they move to a remote working strategy and the issues my daughter and I have been having as we moved to distance learning with her school.

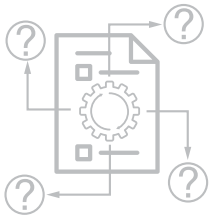


Issue #1: Paper-Based Assignments

Initially, a significant portion of the homework was in the form of paper worksheets that had to be completed and dropped off on in-person. Some of the worksheets were single-sided, but most were double-sided, and many were multiple pages stapled together.

Then things changed, as the governor made the decision to close all schools in the state. That meant two significant changes: we couldn't drop any assignments off, and we couldn't pick up any new assignments. Now, the teachers did a fantastic job of making the new assignments available online – though some of them are still handouts.

Business Lesson: In business, paper plays this same dysfunctional role in our processes. Printing for a wet signature and other steps that require a hard copy will slow your processes down. At AIIM, we love to say "digitize anything that moves!"



Issue #2: Poorly Defined Processes

Because of these issues, the school indicated that we could submit the previous and future paper-based assignments digitally and then either email them directly to their teachers or upload them to Google Classroom. Now, most students probably don't have scanners at home, but they all have access to a mobile phone camera. Some teachers acknowledged receipt, but most didn't, so we have no way of knowing if they got everything or if there were issues.

The first set of assignments were graded, and one of my daughter's teachers indicated to us that she was missing nine assignments. In the email, he also noted that "if you submitted a physical assignment last Monday and you do not have a grade for it, you probably didn't put your name on the paper, and we will have to deal with this matter later."

I checked and sent him an email confirming that that couldn't be the case, they were all turned in, and that I had taken the photos and emailed them to him myself. But I thought about it and realized that there was a third, even more significant problem that was exacerbated by the first two issues I identified.

Business Lesson: In business, process steps need to be clearly defined. There must also be review and approval steps included in the workflow. You could probably also add change management to this list, since, as of this writing, there are still students who have not turned in a single assignment.



Issue #3: Missing Metadata

So what was the issue? Recall my description of the assignments earlier: mostly double-sided, meaning that for any given assignment, I had to take two pictures, front and back, and email those to the teacher. And for the worksheet packets with multiple pages stapled together, it became an exercise in old-school document prep: remove staples, un-crease the dog-eared pages, etc.

But whether single-sided, double-sided, or multiple pages, each assignment had exactly one spot for the student's name and date completed – aka metadata! So when I sent nine images of her nine-page worksheet, one had a name, and the other eight didn't. I certainly didn't think to have her put her name on every page – but she will be doing so moving forward. I'm guessing nobody ever thought of that because when you're submitting them in-person, they are all stapled together.

I suppose I could have used naming conventions, but it's already nearly a minute per page to get them sent over because of other process requirements – and I'm still not confident that that would have made up for the missing name.

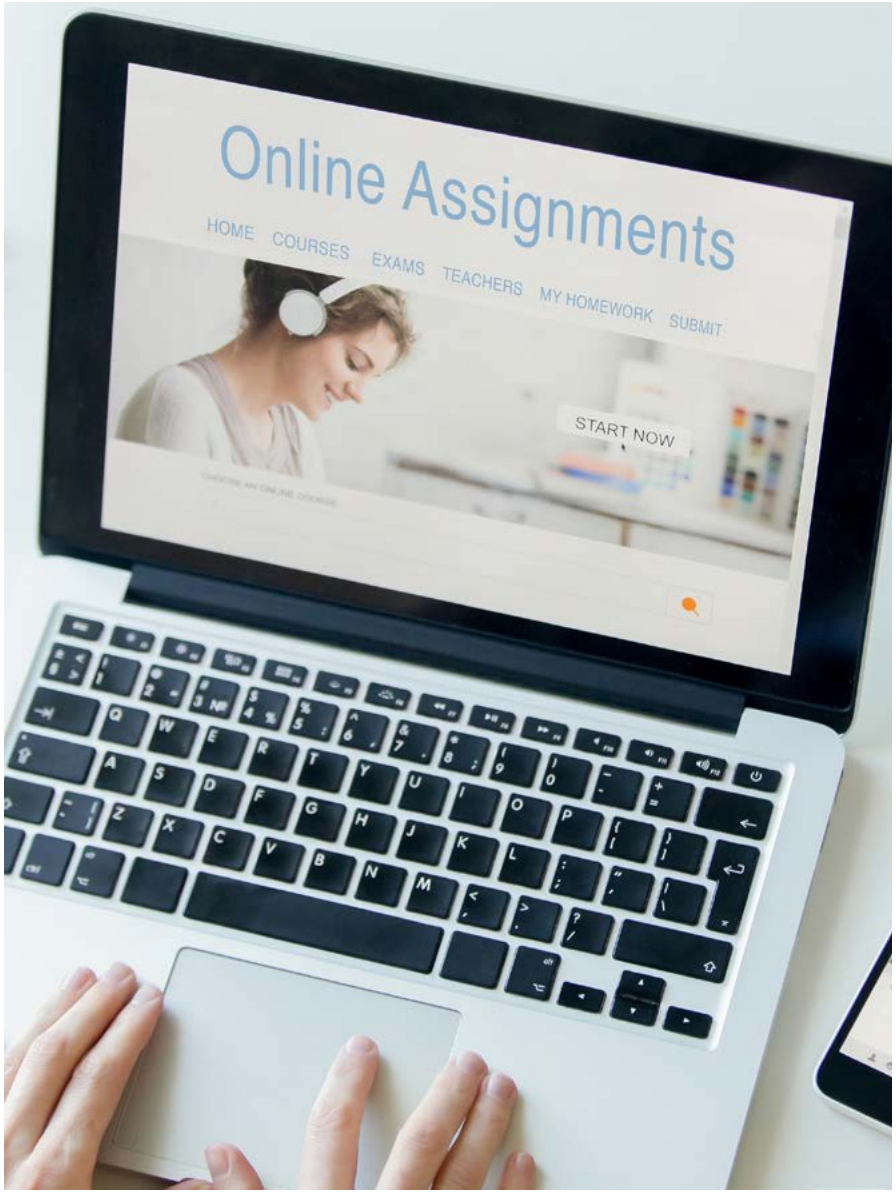
I don't know how the teacher is grading these assignments, but I wouldn't be surprised if he is downloading all the images from a particular class into a single folder and then going through them page by page. 70 students x 50 images of pages of assignments = lots of room for mistakes, especially when around 2/3 of the images had no names on them because we were all following the paper-based process for submission.

Business Lesson: In business, metadata is important data about...well, data. Using metadata summarizes the basic information about your data which makes finding and working with particular instances of data easier.

Reworking the Homework Submission Process

I think we've gotten the assignments resubmitted, though we haven't received confirmation of that. And I do want to stress that, like so many other schools, our school, staff, and faculty have been absolutely amazing in terms of their commitment to keeping the kids learning. In fact, the principal had to remind us parents that teachers have families and home requirements as well.

I'm hoping the school recognizes some of these homework challenges and is able to make some process changes such that all assignments are completed digitally. This should make it easier to track them, for them and for us, courtesy of automated metadata, audit trails, and everything else that goes along with effective information management.





Rapid Change, Rapid Response, and Rapidly Securing Data

By ImageSource

Rapid Change to Business Process

The last year has been like the movie "Groundhog Day" for disaster recovery and data security policies – no clear beginning or end and consequences rolling out day after day. Working from home, access anywhere, and bring-your-own-device are challenges most organizations or technology professionals are ready to meet. We could not predict the extent that each of these must be fully supported and embraced by organizations today, in any combination, and with only end-users available to help hands-on deployment.

Business problems considered solved came back due to centralized process dependency. Paper and scanners on desks, for example. Relying on access to local area networks for an application or applying document security policies had to change rapidly for organizations to deliver essential services or to remain in operation.

Rapid Change and Working from Home

Now the reality is people are in their homes, on their wifi, processing mortgages and refinance applications, working with credit claim disputes, health insurance claims, and unemployment claims, to name a few. At the same time, their children and spouses are working from home alongside them. This is a whole new environment to protect and many new circumstances to plan for. Protecting personally identifiable information (PII) in any environment, on any network, is now a consumer, customer, and constituent expectation for organizations with whom they share their data. The stakes are high to keep services or operations functioning while securing PII. The 2020 Cost of a Data Breach Study by IBM reports a range of $1.6M for public sector data breaches up to $8.6M cost for a healthcare data breach.

Rapidly Securing Data

With all we have experienced in 2020, we have all acquired decision-making criteria for technology solutions. Adaptability is critical. The tools we choose to address problems like accessing and securing data in environments without security infrastructure must complement traditional security best practices. We add new components that dovetail with existing workflows. System administrators and business process owners can't consider any major re-architecture decisions to solve critical operational issues in the short term.

By focusing on content and improving existing outcomes, there is an opportunity to safeguard data and enhance internal and external user's experiences. We have developed a content-centric approach to securing PII information, limiting information from a user's view or access based on established network security policies. The technology is fluid enough to operate uniquely when individuals perform their job on-premise or when working remotely. PII's redaction is not permanent to any document, page, or zone; it's applied temporarily based on the content and the user. This module can be integrated into an existing platform like SalesForce or operate as a part of an ILINX solution.

As you and your organization rapidly change how your staff works from home with PII, and document-centric processes need revision, we can help. ImageSource has been solving business automation and content security problems for over 26 years. Our team has hundreds of person-years of experience in automating and updating legacy systems and data. Our ILINX platform is built on that experience and delivers digital transformation solutions to global financial institutions, state and local government agencies, and businesses of all sizes and industries. You've experienced rapid change and rapid response. Now's the time to rapidly secure your data.

ImageSource®

About Image Source

Founded in 1994, ImageSource is a privately held, founder-led corporation in Olympia, WA. ImageSource is a leader in Digital Transformation and ECM solutions. ImageSource and our ILINX platform provide business process automation for organizations ranging from SMBs, State Governments, and Fortune 500 companies.

For more information visit
www.imagesourceinc.com



6 Quick Tips for Optimizing Your Digital Document Workflows

By iText Software

For decision-makers like CTOs, COOs, IT Managers, Managing Directors, or Procurement Managers, time is always of the essence. Time you can spend solving problems like software sprawl or improving processes. Here are six ways to make dealing with digital document workflows easier.

1: Gain precious time with consistency.

Consistency avoids unnecessary complexity within your organization. Using one codebase for high-volume document manipulations means one methodology of implementation across all your platforms and development teams.

This helps when developers have to dive into existing projects and integrate themselves quickly. Relieve yourself from complexities and free up time to focus on other important issues at hand.

2: Solve software sprawl by choosing comprehensive feature coverage.

Choosing a single software vendor for document processing and manipulation means you can avoid issues with underused or overlapping software licenses.

3: Digital signatures relieve you from security concerns.

PDF digital signatures are a secure and well-established way to ensure integrity, authentication, and non-repudiation for important documents.

4: Build your document processes upon **open-source technologies.**

Enterprises increasingly prefer open-source software vendors. Key decision-makers in major Fortune 500 companies realize the highest levels of software creativity and innovation often originate from open-source community-driven initiatives.

5: Get things done **without developers.**

Functional analysts and business users often require development resources to get things done; resources which are in high demand. Low-code tools relieve developer workload so your business-oriented teams can independently initiate innovation and change.

6: Choose **iText.**

With iText, you can do all this and more.

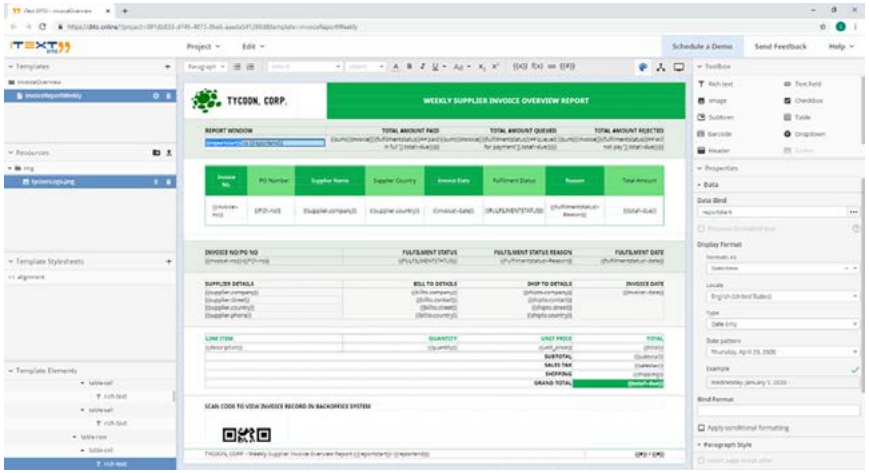
iText is a global leader in PDF technology. We develop innovative award-winning PDF software used by millions of open source and commercial users to create digital documents for a variety of purposes: invoices, bank statements, mobile boarding passes, legal archiving, and more.

The iText 7 Core library has a comprehensive feature set for common PDF generation and manipulation tasks, plus secure digital signing with encryption and hashing, Unicode support, and PDF 2.0 compliance.

Add-ons provide additional functionality like HTML to PDF, OCR text recognition, etc. The modular structure of iText means you can cherry pick the features you need as required.

Open source is in our DNA, however, since iText 7 is dual-licensed commercial license holders can protect their intellectual property, and ensure code remains closed and secure. They also benefit from extra closed-source modules, extensive support from our PDF experts, and early access to specific new features.

We also have low-code solutions for tasks like document data extraction and PDF design and creation enabling business users to achieve tasks themselves, or simply save developers' time.



With iText DITO you can easily create data-driven documents

Finally, as a member of the ISO committee for PDF specifications, you can rest assured of iText's high-quality PDF handling and standards-compliant document production.

20+ years of constant development has resulted in a stable and mature codebase, including an IP code review to ensure it is safe to use in corporate environments.

About iText Software

iText is a global leader in PDF technology.

We develop innovative award-winning PDF software which is used by millions of users – both open source and commercial – to create digital documents for a variety of purposes: invoices, bank statements, mobile boarding passes, legal archiving, and more.

To learn more visit:

www.itextpdf.com





Collaborating in the Digital Workspace

By Jesse Wilkins, CIP, AIIM

Now's the time for organizations to more fully explore the idea of a more permanent digital workplace.

At AIIM, we've been talking about the digital workplace for years. And as a full-time remote worker since 2004 myself, including more than ten years at AIIM, I think I have some unique insights I can share on how to make collaborating in your digital workplace successful.

The Digital Workplace Is More Than Technology

Many digital workplace initiatives start with technology. But much of what makes one successful needs to happen before the technology is put into place.

Planning for a digital workplace needs to start with an understanding of how the organization works today. You'll want to answer these questions:

- What information do employees need to access?
- What systems currently hold that information?
- Is information stored in systems that can be accessed remotely?

We recommend that organizations do an inventory of their systems and the information they contain and identify systems that are hard or impossible to access remotely.

Preparing Your Organization for the Digital Workplace

It's important to be able to access the documents you use to run your business. Some technical aspects to address to help ensure your digital workplace is effective:

- Digitize everything that moves.
- Digitize your business processes.
- Determine the right way to provide remote access.

It's also incredibly important that the organization standardize on tools and systems to the maximum extent possible – remote work is challenging enough without

having to check a number of different systems, especially the bootleg work-arounds that remote workers may use in the absence of sanctioned infrastructure.

Collaboration Is Key

One of the more challenging aspects of the digital workplace for many employees is how to collaborate on a document remotely. This often devolves into a series of email exchanges with attachments, in a variety of formats and versions, that makes collaboration much more difficult than it has to be.

Instead, organizations should consider implementing tools designed for collaboration. These can be grouped according to their primary function, though there is significant overlap. *Each group has some examples, but this should not be considered an endorsement of those examples.*

- **Person-to-Person Collaboration:** This is the equivalent of leaning into someone else's cubicle or office and sharing updates. These tools generally include some sort of public messaging or sharing, status indicators, screen sharing, lightweight web conferencing, and private messaging. Examples here include Slack, Yammer, and Microsoft Teams.
- **Web Conferencing:** These tools allow dozens to hundreds or more to participate in a call complete with video, screen sharing, recording, drawing tools, and much more. Calls can be recorded to preserve them or share with those who couldn't participate in the initial call. Examples here include Webex, GoToMeeting, and Zoom.
- **Document-Centric Collaboration:** These tools focus on how to create, edit, finalize, and ultimately approve of a document which can then be shared. Some tools offer synchronous collaboration in the form of coauthoring, such as Xait and SharePoint; others focus on a more traditional document management/version control-type approach, such as Box and Dropbox. Many of the traditional content services platforms offer these types of capabilities as well.

Collaborating in the Digital Office – It's Not Just About Combating Coronavirus

While the impetus for collaborating in the digital workplace is currently due to the immediate issues with coronavirus, organizations should consider whether the digital workplace might actually make employees more effective long-term.

It does require proper planning, and the technologies involved should be planned, standardized where possible, and supported by IT. Employers and employees alike have to trust that work will get done in the way it needs to be and with appropriate access controls and security considerations. But organizations should consider remote work and digital workplace capabilities for any employee that is not physically required to be onsite. Facilitating this with the right collaboration tools and technologies integrated into your infrastructure will be the key.



This year, the AIIM Conference is different - it's digital. We're embracing the benefits of this new format to give you a conference that is light years ahead of its time. Why are we calling it a "Galactic Digital Experience" you ask?

Because this year, the sky's no longer the limit!

Join the global information management community as we bring you the latest on the industry's hottest topics including:

- Intelligent Capture
- Process Automation
- Information Governance
- Organizational Intelligence
- Professional Skills

Click here to learn more and to start your Galactic Digital Experience.

aiim



About AIIM

AIIM helps organizations improve their performance by transforming the way they manage their information.

Visit us at www.aiim.org