Vol 38 / Issue 1 / March 2022

iQ

THE RIMPA QUARTERLY MAGAZINE

Capturing Record and Information Management News since 1984

SPECIAL FEATURE:

EXECUTIVE MANAGEMENT AND TEAMS:

Workplace and Virtual

IN THIS ISSUE

- Why a Little-Known Mathematical Formula is Driving Many AI Systems
- 5 Things to Consider Before Making M365 Your Only Privacy and Compliance Strategy
- A Good Team Needs a Good Leader

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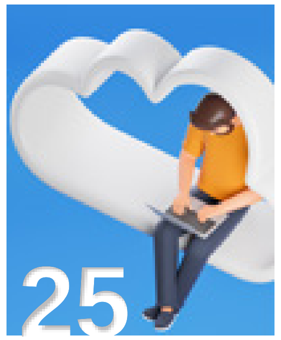

ANNE CORNISH MRIM
CEO, RIMPA

VIEW FROM THE CEO

2021 is behind us and 2022 is in full swing for RIMPA members.

The Board met in person in January 2022 to discuss the year ahead, with the majority of the two days strategising about increasing member value and strengthening engagement with practitioners, partners, vendors and volunteers across our industry.

You spoke and we listened! The Board reviewed your latest feedback, and this year will see RIMPA continue to grow as the peak body for records and information management practitioners with lively discussions progressing on the concept of "One RIMPA".

"One RIMPA" relates to providing consistent services to all members, breaking down barriers and ensuring that all members, regardless of their location, experience or time in the industry, receive equal value for their membership dollars. "One RIMPA" provides opportunities for RIMPA to expand our family globally, by inviting those countries who currently don't have the luxury of a RIMPA in their own backyard to join. In addition, volunteers who are keen to offer their skills for short term initiatives will be pleased to hear that "One RIMPA" will also make getting involved easier and less bureaucratic.

The "One RIMPA" concept is exciting for all, full of challenges and remarkable opportunities. We hope you enjoy the journey alongside us all.

2022 has already seen a rocket let loose with the commencement of RIMPA's Certificate III in Business Management with a Records Management specialisation. Over 70 practitioners have already expressed interest for the initial intakes commencing in March and June. This interest reiterates the need for professional development in the industry and why RIMPA is committed to maintaining a focus in this area.

To further compliment the Certificate III, RIMPA have partnered with the College of Adult Learning RTO to offer a Diploma in Business Management with a Records Management specialisation. The course has been accredited by RIMPA and will utilise RIMPA resources to conduct the required assessment process. Information about both the Certificate III and Diploma can be found on RIMPA's website. RIMPA members will receive a large discount when enrolling.

The RIMPA training workshops, which have been a great resource for members over the past few years, have now become a revenue stream for RIMPA and will be expanded in 2022 to include:

- Metadata Fundamentals
- Capturing and Managing Social Media Information
- Managing Virtual Teams
- Selling the Value of Records and Information Management
- Understanding and Developing Information Asset Registers

Even more professional development will be on offer at this year's RIMPA Live to be held in Canberra between the 14th and 17th June. The program is outstanding and addresses all the trending topics of today and provides insights into what is expected for the future. I will personally be conducting a workshop on how to improve the Records Management profile in your organisation, or as I like to put it..." how to make Records Management sexy?"

There is something for everyone at this year's RIMPA Live event and we encourage members to attend.

There will be live streaming of the plenary room sessions so hop onto the RIMPA website and register now.

Professional Members will see more benefits on offer in 2022 to complement their exclusive access to the Digital Preservation Coalition Toolbox and free access to Information Management standards via SAI Global. If you have not accessed these services as yet, please contact head office and we can connect you.

"THERE IS SOMETHING FOR EVERYONE AT THIS YEAR'S RIMPA LIVE CONVENTION AND WE ENCOURAGE MEMBERS TO ATTEND."

A training survey is currently in test mode for members based on the national competency standards, to identify capabilities, areas of improvement and further skills for all four practitioner levels.

- Foundation
- Practitioner/Skilled operational
- Management/Specialist
- Executive/Lead

The survey is extensive, and addresses Information Management, archives, records and data. Completion of the survey allows managers and employers to conduct a self-assessment of staff capabilities and identify the required professional development. Great tool to use when undertaking performance management activities or if you just want to learn about yourself.

The list of initiatives goes on, but I should save some news for the next edition of IQ and give you time to absorb what is already happening. I look forward to catching up with members in all states and territories this year with travel becoming more accessible by attending local events and Branch meetings.

MEMBER UPDATE

Congratulations to Linda Shave who was upgraded to Fellow

Linda is a futurist who has a fascination on how evolving technologies can be used in innovated ways. Linda is a researcher, presenter, advisor, and author. Her innovation, knowledge and expertise have been nationally and internationally recognised. Amongst her numerous industry awards is the prestigious gold medal laureate for government innovation issued in Washington DC. Linda is an advocate for the R/IM profession as well as being a School Governor, STEM Ambassador and Quantum Ambassador. Linda is an educator who believes in lifelong learning, reskilling, and upskilling the workforce for the jobs of today and tomorrow.

RIMPA LIVE 2022

Have you registered to attend RIMPA's BIG event of the year?

Join me in Canberra 14-17 June at the Hyatt Hotel at the RIMPA Live Convention.

Visit rimpa.com.au *for more information*

Welcome To Our New Members

NEW CORPORATE COMPANIES

ACT
- Open Vista Consulting Pty Ltd
- Australian Competition and Consumer Commission
- Clean Energy Regulator

NSW
- City of Canada Bay Council
- New World Records

WA
- Rise Network
- Wesfarmers Chemical, Energy and Fertilisers
- Child and Adolescent Health Service

NEW INDIVIDUALS

ACT
- James Dyer (1st Year Student) - SAHR Group

NSW
- Azra Markulin (1st Year Student)
- Tessa Morris (Student) - University of South Australia

NZ
- Louise Norton - Law Commission

QLD
- Andrea Priestley - Queensland Museum
- Phil Harrison - Raytheon Australia

SA
- Navpreet Kaur (1st Year student)
- Tania Huscroft (1st Year student)- EQUALS International
- Corey Starkey - Lockheed Martin Australia

VIC
- Caroline Shen (1st Year Student) - RMIT University
- Anthony Dean
- Matthew Niccoli (Student)

WA
- Lesley Jolliffe - Catholic Education Western Australia
- Jade Verkroost

74 Corporate Nominees have been introduced to RIMPA!

Join RIMPA today and become part of a growing community of Records Management professionals, access a wide range of training programs, webinars, discounts and more.

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iQ

NEXT EDITION: JUNE 2022

MODERNISING THE FOUNDATIONS OF RECORDS AND INFORMATION SYSTEMS: BIG DATA

More organisations are storing, processing, and extracting value from data of all forms and sizes. Systems that support large volumes of both structured and unstructured data will continue to rise. But there is some hesitation, barriers, and hidden opportunities that we need to take in consideration when it comes to Big DATA.

- What are the Big DATA trends?
- How do you make data approachable to the end user?
- Capturing data: The process, access and understanding the data
- What are the hidden opportunities of data?
- Barriers to enterprise adoption of Big Data?
- Purpose Built Tools for Data Management

Want to contribute to iQ?

Refer to iQ's submission guidelines and author checklist before submitting articles
Visit rimpa.com.au/news/iq/iq-article-submission for submission guidelines.

COPY DUE: 12 APRIL, 2022

Submit your story to: editor.iq@rimpa.com.au

Update from Public Record Office Victoria

Led by Public Record Office Victoria (PROV), the Council of Australasian Archives and Records Authorities' Digital Recordkeeping Initiative Group (ADRI) has released a paper entitled Functional Requirements for Information in M365. The paper provides the high-level records management principles and requirements to assist government agencies in implementing Microsoft 365 (M365) across all ADRI member states.

Recordkeeping capability can vary depending on the software service used, type of license held and any third party integration, such as an electronic document and records management system (EDRMS) or enterprise content management system (ECMS). Effective records management can be achieved by working across M365 services and (where necessary) through integration with other systems to build records management functionality and associated processes.

For Victorian government agencies, M365 must be implemented and managed in compliance with all PROV Standards. Requirements include those for system maintenance, storage of digital content, migration, metadata, format, minimum required retention periods, and governance.

Ideally, records management controls should be included during the planning and configuration stage, as the ability to adjust configuration settings may be limited post implementation.

Public Record Office Victoria

You can visit our website for more information, additional resources, and to download the ADRI paper: https://prov.vic.gov.au/recordkeeping-government/a-z-topics/microsoft-365

Rose Barrowcliffe
First Nations Archives Advisor
Queensland State Archives

Queensland State Archives: First Nations First Program

To improve outcomes for Aboriginal and Torres Strait Islander Queenslanders, Queensland State Archives (QSA) has embarked on its 'First Nations First' program to use the state's archival collection to acknowledge the past and foster truth telling and healing.

FIRST NATIONS FIRST PROGRAM

Many aspects of First Nations perspectives have been absent in historical government records, leaving us with a narrative that does not include those important voices. Through our First Nations First program, we are seeking to change this by supporting the Queensland Government's Path to Treaty, particularly truth telling.

QUEENSLAND'S INAUGURAL FIRST NATIONS ARCHIVES ADVISOR

In July 2021 proud Butchulla woman, Rose Barrowcliffe, was appointed as Queensland's inaugural First Nations Archives Advisor to help QSA develop a more inclusive record of Queensland history. By recognising Aboriginal and Torres Strait Islander people's worldviews and perspectives, we can move to a model of respect and raise awareness of our shared history.

For Rose, archives are not just an interest, but a way for First Nations voices to be included in the telling of history. She is currently undertaking research at the University of the Sunshine Coast on the representation of Indigenous peoples in archives and historical narratives – making her perfect for this role.

The creation of the First Nations Archives Advisor position was in response to the Tandanya-Adelaide Declaration which challenges archives around the world to include the experiences and perspectives of First Nations people in their collections.

Rose is working with us to ensure First Nations perspectives, concerns, and considerations are included in any decisions that we make into the future. Rose has been extended in her role with QSA and will continue undertaking her important work until 30 June 2022.

Update from the State Records Office WA

LEFT: (L-R) Sarah Tout (producer), and Darryl Kickett, Gabriel Maddock, Anna Haebich & Dean Collard, the researchers behind the 2021 Geoffrey Bolton Lecture: Yarning Ancestors Words. RIGHT: Emeritus Professor Jenny Gregory accepts the 2021 Margaret Medcalf Award on behalf of the editors and authors of the Carceral Colony.

The State Records Office WA wrapped-up 2021 with events and podcasts that celebrate the work of researchers from across the country using the State Archives.

On the anniversary of the Tandanya Declaration on challenging and decolonising the archive on 25 October, the State Records Office launched the 2021 Geoffrey Bolton Lecture: Yarning Ancestors Words as a special podcast.

This is a powerful and compelling exploration of the writing, knowledge, and activism of the Nyoongar people which has - until now - remained seemingly hidden and silenced in the State Archives contain. The podcast format invites a more intimate relationship between speaker and listener, and we encourage you to make some time to hear about this important work.

Congratulations to the authors and editors of The Carceral Colony - the winner of the Margaret Medcalf Award for 2021. This annual Award for excellence in referencing and research honours Miss Margaret Medcalf OAM, the second State Archivist for Western Australia (from 1971 to 1989), for her contribution to the development of archives in Western Australia.

The Carceral Colony, an edition of Studies in Western Australian History produced by the Centre of Western Australian History at the University of WA, is a significant and comprehensive collection of research papers that help us to think more broadly and better understand the connections between all people impacted by the penal system in colonial WA.

For more on records and archives happenings out West visit sro.wa.gov.au

Information Management Policy – it's principled in South Australia

In 2019 State Records of South Australia kicked off an overhaul of its information management policy suite. This was a response to feedback about the need to modernise and simplify the previous approach. The original suite of policies and guidance, which was developed in 2004, was no longer fit for purpose and was overly prescriptive.

Key aims for the overhaul include a reduction in the number of policies and an important shift to a principle-based approach. This new approach outlines minimum requirements only, allowing South Australian government agencies greater flexibility. Agencies can now scale activity to meet their individual organisational context. This model remains consistent with South Australia's legislative environment and wider industry standards.

There are two foundational documents in the new policy suite:

- the South Australian Government Information Management Strategy, and
- the Information Management Standard.

The Strategy establishes the principles that agencies must follow. The principles will ensure data and information assets can be relied upon and trusted. The Standard expands on the Strategy's principles. It outlines the behaviours expected when managing government information to achieve business objectives and meet legislative and policy obligations.

State Records has also identified new and replacement Standards, which focus on simplification and ease of use. Standards that have been issued cover:

- Managing Digital Records in Systems,
- Minimum Recordkeeping Metadata Requirements,
- Appraisal,
- Disposal, and
- Transfer.

An information governance guideline will pull this initial phase of work together. This guideline will touch on components that agencies need to consider and address in their information management programs.

A new self-assessment tool will be linked to the guideline. Agencies can use this to assess their information governance maturity against the Strategy and Standard and prioritise areas for improvement. Consultation on these important resources will begin in the coming months.

Other information management policies that are under development include:

- guidance on the development of disposal determinations,
- use of various technologies in managing records, and
- disaster preparedness.

In 2022 State Records will also focus on developing policy specific to the management of personal information. This has been highlighted as a key area of community interest during the pandemic.

The new policy suite will be contemporary, technology neutral and easy to use, assisting agencies with their information management obligations. This benefits both government and the South Australian community by ensuring the integrity and accessibility of government information.

Further information can be found on the State Records website

2021/22 RIMPA BRANCH EXCELLENCE AWARDS

The 2022 RIMPA award season has commenced! The RIMPA Branch Excellence Awards are now open for nomination and will close on 31st March 2022.

The awards honour those who have made significant contributions to the advancement of our profession and who are leaders in the Records and Information Management industry.

They culminate in the recognition and celebration of organisations and individuals that implement initiatives and industry leading services that raise the visibility of Records and Information Management across industries.

The recipients of all Excellence Awards become the nominees in the Company Outstanding Achievement Awards presented during RIMPA Live.

In line with RIMPA's quality and auditing schedule the criteria for these awards have been reviewed, with some amendments being made.

The most significant changes are:

- All nominations must include specific supporting evidence
- All winners will receive 12-month RIMPA membership
- New Professional award has been renamed to 'New Practitioner'

With the New Zealand Branch transitioning into the NZ Chapter, we wanted to make sure that members of the profession within NZ are still able to nominate for these awards. Until further notice the awards are still open and the RIMPA Board will judge and present these awards.

CATEGORIES

The Awards are presented in the following categories:

- **New Practitioner**
- **Outstanding Student**
- **Outstanding Group**
- **Outstanding Individual**

New Practitioner

Presented to a new member of the records and information management industry who has been working in the industry for less than 5 years. The recipient of this award will show potential to succeed within the industry, excellence in the performance of their current employment, dedication, a positive attitude, and contribution to RIMPA.

Outstanding Student

Awarded to a student who has achieved excellence in their educational studies, the award is open to full and part time students who have completed their study in the preceding two (2) years. The learning may be at any level and must be undertaken through either an accredited RTO or RIMPA. If the nominee has completed RIMPA training, this must be a compilation of no less than 10 training sessions.

Outstanding Group

Open to groups (other than RIMPA Committees) who have either implemented initiatives that have made an outstanding contribution, increased collaboration in either their respective organisation/s or the wider records and information management industry OR groups that have made a significant impact in their organisation or the wider records and information management industry.

Outstanding Individual

The pinnacle award bestowed upon an individual within the records and information industry by RIMPA Branches. This highly coveted award is the highlight of the Branch award season and is presented to an individual who has demonstrated outstanding achievements in records and information management that have made a difference within their organisation, the industry and RIMPA. They are role models from which we can all learn.

Honouring Contributions to RIMPA

In recognition of significant individuals, some Branch awards have been named to honour the contributions these people have made in our industry and community. They are:

ACT Branch

- Rob Barnett Outstanding Individual

NSW Branch

- Peter A. Smith Outstanding Student

NZ Branch

- Dr Gillian Oliver Outstanding Student
- Dianne Macaskill Outstanding Individual

QLD Branch

- Harry Haxton Outstanding Student
- Harry Haxton Outstanding Group
- Chris Simpson New Practitioner
- Chris Simpson Outstanding Individual

SA/NT Branch

- Lisa McDonough Outstanding Individual

VIC / TAS Branch

- Judith Ellis New Practitioner
- Dr Frank Upward Outstanding Student
- Professor Sue McKemmish Outstanding Group
- David Moldrich Outstanding Individual

WA Branch

- Marita Keenan Outstanding Student
- Neil Granland Outstanding Individual

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INDUSTRY PARTNERS 2022

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RIMPA PLATINUM PARTNER
LEADERSHIP THROUGH DATA
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fyb

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Records Solutions
tImg
VOTAR PARTNERS
ZircoDATA

Together we succeed.
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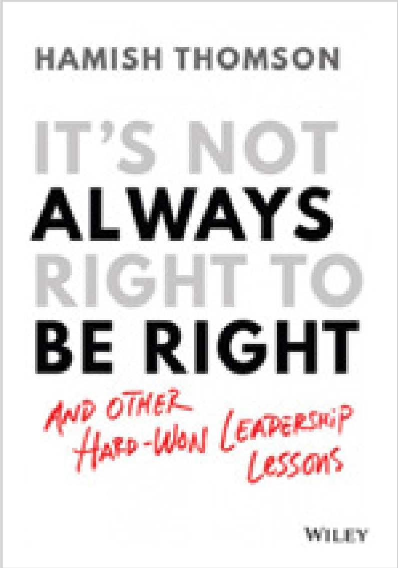
It's Not Always Right to Be Right

and Other Hard-Won Leadership Lessons

By Hamish Thomson



A browse at a bookshop in the management section reveals a grand selection of books devoted to the topic of management and leadership. It leaves the browser non-plus as to what is the difference between all these books and the message being delivered. After all isn't the theory of management and leadership the same. Is this book just another in the management genres of how to be a better manager destined to sit on the bookshelf with all the others so they can be seen at the next zoom workplace meeting to show some authority that you know what you are talking about.

REVIEWED BY PHILIP TAYLOR

The author Hamish Thomson is a well-regarded senior manager in private industry. He has been a senior manager at several companies both overseas and in Australia. It is interesting to note that overwhelmingly management books are written by private business managers. Very few books on the topic venture into the public administration field. So, is there anything in this book that turns it into a must read?

Thomson's starts by asking the question 'what do you want to get out of this book?". He goes on to explain that if the reader gets just one or two ideas that resonate with you – claim them as your own and even stamp your leadership style on them.

The central thesis of the book is that leaders aren't always right, mistakes will be made and that's how you learn to be a better leader. A similar analogy could be applied to learning at school or university. You learn from what you don't know but discover in the journey through life. To be a better manager you need to learn that you will make mistakes and poor decisions. That is the pathway to being a better leader.

The book explores a number of themes including relationships, how to build them, nurture them and if necessary if they become destructive get out of them if you can. Be authentic and try not to be something you aren't. Get results but forget about looking for awards. Does experience matter? As you move through life we collect a lot of experiences – some good, some bad but mostly forgotten. As a leader we recognise those experiences and use them to better ourselves and thus learn. How to deal with the bad boss – recognise that you can learn from them.

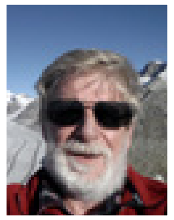
Each chapter sets out the central message that Thomson is writing about. He has a chatty manner and uses his experiences and insight well to illustrate his central points. At the conclusion of his message, he incorporates some practical issues to assist the reader with the theory before the reader is given practical examples to support the learning. Each chapter concludes with a critique from a senior private enterprise manager on their experiences.

"... LEADERS AREN'T ALWAYS RIGHT, MISTAKES WILL BE MADE AND THAT'S HOW YOU LEARN TO BE A BETTER LEADER."

The book is an interesting read, full of practical tips and insights on how to become a better leader by learning it's not always right to be right.

The outtake from this book is when a manager is concerned about many issues such as what are the risks to continuing business, having the best people to do the work, have good compliance and quality systems, high level of IT security and perhaps the most important good records management systems mistakes will be made. Treat those mistakes as learnings and you will be a better manager.

One for the library.



ABOUT THE REVIEWER

Philip Taylor MRIM (Life). He commenced his career in the records management industry in 1970 and joined the former RMAA in 1974. Graduating from RMIT and Monash University he worked in various Victorian Government agencies. In 1992 he relocated to Queensland and joined the Queensland Branch Councillor in 1993 and in 2001 became Branch President, a position held until 2007. Philip is currently a member of the Editorial Committee of iQ. With a career in records management spanning both state government and higher education. Now retired, he still maintains an interest in records management especially in the area of public policy interaction with records management. He was awarded Life Membership of the RIMPA in 2006.

2022 UPCOMING EVENTS

INFORMATION AWARENESS MONTH

May 2022

Information Awareness Month (IAM) is the opportunity for industry bodies and industry practitioners to work together to celebrate the amazing profession of managing information.

The collaboration of industry groups continues to evolve by strengthening relationships which in turn, provides added exposure to all things information for all members.

During the month of May all the collaborative bodies will work together to bring you a series of events being held across the globe.

Check the RIMPA events calendar for dates.

RIMPA LIVE CONVENTION 2022

KEEPING P.A.C.E

14-17 June

The Hyatt Hotel | Canberra

Join us in person at the main hub in Canberra. Reset, reconnect and reignite your relationships with old and new colleagues, field specialists and the RIMPA community at THE event of the year!

We have your different registration options covered.

Full convention registration gives you maximum networking value, full access to all sessions, trade expo and social events

Can't make it to the full event, then why not get yourself a **day delegate** pass? Wander through the trade expo and check out the latest innovations and product updates, attend a workshop or industry session and embrace the feeling of meeting again!

If travelling to Canberra or budget is an issue, you can attend the convention virtually. Sessions in the plenary space will be streamed to you live, wherever you may be.

REGISTER NOW and take advantage of the Early Bird Prices!

RIMPA UPCOMING EVENTS

Our 2022 event calendar is jam packed with professional development opportunities!

With over 100 events planned we have got you covered with trending content, updates from our amazing trade industry partners, as well as new virtual training workshops that will keep your tool belt of skills loaded and keep you one step ahead of the game.

We are also excited about the addition of the RIMPA Roadshows "Connecting Locally", which will be landing at a city near you, a travelling event that will guide you back to in person events.

Stay tuned and check the RIMPA events calendar for dates.

RIMPA

For more information **visit rimpa.com.au**

The 7 Habits of Woke Leaders

Why leading by example creates a bigger impact than lecturing for "change"

BY NIKKI FOGDEN-MOORE

Conscious leadership (both personally and professionally) is a vital evolution in creating strong teams, families, and companies. Now more than ever, the responsibility of leading by example and our larger culture is stemming from companies who have been given the charter of making decisions that impact individuals at home as much as at work.

As a leader we cannot avoid the spotlight being on our own actions and how we manage unprecedented times with grace and vision. Leadership is about evolution as much as it is resolution and resilience. Here are 7 habits of truly 'woke' leaders:

1. AWAKE LEADERS DO NOT 'ADVERTISE' THE FACT

Awareness does not require a badge of honour - it is a private and humbling process that often has involved deep reflection, tough lessons, and true experience. It is the art of listening and observing rather than announcing. Woke leaders are too busy being themselves to tell you about how "aware" they are.

2.AWAKE LEADERS MAKE TIME FOR THEIR WELLBEING

As a core part of mental and physical and emotional performance conscious leaders know to put their Oxygen Mask on first. Burnt out leaders cannot perform. Running a company, a family and a life is like the grand slam premier sportsmanship. It requires mind/body/soul wellbeing to reduce the effects of stress, improve decision making and regular sleep. A healthy heart is the best investment for sustainable success. "Woke" leaders have the self-discipline to maintain personal wellbeing as part of a positive P&L.

3.AWAKE LEADERS DISCERN WITHOUT JUDGEMENT

Observation without projection. I refer to this with my clients as 'owling'. One of the most brilliant ways to review a project, person, group, or situation. Rather than swooping in and reacting based on triggers and fears in situations, 'woke' leaders press pause and take a moment to have a higher perspective. Is this going to matter in the long term? How does this affect the 'now,' my team, customers, our core delivery? Where are the triage points? What is the NEXT right thing to do? There is no judgement but rather a more strategic and intuitive alignment to reflect, ascertain and make a decision from a place of informed neutrality.

4.AWAKE LEADERS ARE KIND AND COMPASSIONATE BY DEFAULT

Kindness and empathy are crucial traits of effective woke leaders. Not as martyrdom, but as an understanding that individuals and teams around them will have different lives, perspectives, and situations they are facing and not everyone has the tools or resources to hand as many leaders do. Kindness does not require validation. It is the natural balance to form a combined sense of achievement and showing significance.

5.AWAKE LEADERS KNOW WHEN TO RETREAT TO HEAR THEIR OWN INTUITION

You will often find a conscious leader quietly taking a moment to themselves. Whether it is 10 seconds or 1 hour to review, refine and get centered. To connect with their trifecta of experience, intuition, and intellect. Three very crucial tools to be used in unison. This means stepping away from the white noise of peer pressure, opinions and the familiar. Pioneers need space to create the small pivots that create incredible results. They trust their gut and know how to press pause to clearly discern between that and everything else.

6. AWAKE LEADERS ARE ALWAYS CURIOUS

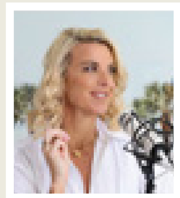
How can this be better, what other options are there, how can I evolve? Woke leaders make the choice to replace fear with curiosity. Not in a reckless way - more in the understanding that to keep doing things the same way means you will get the same results. Making decisions from a place of "what if" - rather than avoidance, doubt, blame and shame. Woke leadership means a commitment to continually learn and be agile.

7. AWAKE LEADERS LEAD BY EXAMPLE

Aware leaders do not lecture. We have all no doubt had to re-program through the years and learn in our journey of leadership. Over managing, over informing does not create an environment of learning and growth. It de-oxygenates the environment and often shuts down performance. Instead evolved leaders provide a clear framework for the common why/what and a best practice for the how. It is the art of saying something clearly once, with regular milestones aka "pit stops" as checkpoints, rather than micromanaging. Empower teams to have input at each stage and nurture the result with clear KPI's and best practices, which ensure quality of time, budget, and end delivery along the way.

YOU WILL OFTEN FIND A CONSCIOUS LEADER QUIETLY TAKING A MOMENT TO THEMSELVES. WHETHER IT IS 10 SECONDS OR 1 HOUR TO REVIEW, REFINE AND GET CENTERED. TO CONNECT WITH THEIR TRIFECTA OF EXPERIENCE, INTUITION, AND INTELLECT.

"Woke" leadership is an inside job. It is a subtle recognition that when we are aligned it provides an incredible place of humility, strength, and natural character to cultivate trust and momentum. This is where true co-creation and collaboration can exist. Being a genuine leader is a constant evolution with grace and awareness - it is progress not perfection.



ABOUT THE AUTHOR

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You Rolled Out Your Remote Workplace in Record Time

Now Let's Talk Governance

When it comes to the digital workplace, governance and expediency are not always the best of friends. Governance essentially takes a longer-term view, establishing controls, processes and rules that makes the digital workplace sustainable going forward. Expediency tends to yield to the short-term view, cutting corners to drive forwards an immediate need, with the mid- to longer-term view filed under "worry about it later."

BY STEVE BYNGHALL

Of course, with the COVID-19 crisis, expediency has been the primary concern of most digital workplace teams with urgent needs to provide business continuity. Many digital workplace professionals have had to rush to support vastly scaled-up remote working, potentially rolling out new collaboration tools, accelerating the launch of Microsoft Teams, Zoom and so on.

By all accounts it sounds like most digital workplace teams have done pretty well and probably after a few hiccups here and there, people are now getting into their rhythm, working remotely and getting on with using the new tools at their disposal.

NOW IS THE TIME TO CONSIDER GOVERNANCE

If you have successfully achieved some state of business continuity, then you have done very well. Now it is time to start thinking about governance and introducing it as soon as possible.

For example, many organizations will have rolled out Microsoft Teams and bypassed some of the essential governance steps that help you to manage the platform and ensure it doesn't corrode into a messy sprawl that employees find increasingly frustrating to use.

Leave a Microsoft Teams platform in place in its current state and a few months down the line you may have significant issues with a proliferation of spaces, leading to:

- Many duplicated and unused sites, making management of the platform harder.
- Higher risk of misuse of a Teams space.
- Poor findability where users cannot find the right space.
- People using Teams in a sub-optimal way, for example where another tool would be better.
- Users feeling overwhelmed with too many spaces and channels.

A lack of information about the sites on the platform that make it harder for the central team to manage.

Of course, similar problems can apply to any collaboration tool that has been rolled out.

INTRODUCING RETROSPECTIVE GOVERNANCE

The word governance makes some digital workplace teams nervous. It still has negative connotations. By establishing some rules and processes on their site owner community or their users, they feel like an overprotective parent who is breaking up a teenage party. They also worry they will introduce a barrier to adoption or add to the workload they are creating for themselves. There may also be a natural reluctance to introduce another change that may feel like it impedes current ways of working, which are already strained because of the lockdown.

THE WORD GOVERNANCE MAKES SOME DIGITAL WORKPLACE TEAMS NERVOUS.

All these concerns are legitimate. Typically, at Spark Trajectory when we discuss governance with our clients we try and emphasize:

- Governance is a balance and needs to be right for you — it's not about being too bureaucratic or creating work for work's sake.
- Governance can be viewed through an improvement lens: this is about putting rules in place to make your platform and the related user experience more successful, not less successful.
- Involving users and their feedback in how you introduce governance can help compliance and get that balance right.
- Although we would usually advocate for a comprehensive approach, some governance is usually better than no governance.
- This is about the medium- to long-term view. Most investments in digital workplace tools are made with that longer-term view in mind.

Particularly if you are introducing retrospective governance into your digital workplace when everybody is working from home, using site owner and user feedback to shape your approach will have real value.

WHAT ARE THE PRIORITY AREAS FOR GOVERNANCE?

If you've just rolled out Microsoft Teams or similar, there will be some priority areas of governance to focus on. These include:

Getting a comprehensive list of spaces that have been established including names, owners, the purpose of the site and so on. You need this information to be able to put processes in place to avoid site sprawl and to maintain a central register of sites going forward.

Get some control or oversight of the site provisioning process.

Site provisioning is at the centre of effective governance here. You either need to be able to put in some kind of approval process or be able to gather information to provide some kind of retrospective review, to avoid site duplication, high-risk sites or unused sites.

Establish a site or space review process.

Have a regular site or space review process where either the site owner reviews whether the site needs to be kept, improved or deleted, either a few weeks or months after creation. You will also need an additional review process where the central team has identified a site is a duplicate or high risk. You may need to apply these reviews to sites already created.

Review the central administration controls.

On a platform like Microsoft Teams, you can do quite a bit of central configuration to establish governance. These may need to be reviewed if you rolled out an application quickly and can be looked at with the benefit of hindsight to identify any issues that have arisen.

Work out site roles and responsibilities.

Having clarity over what a site owner is expected to do to manage their site is critical in managing a platform going forward.

GOVERNANCE MAKES THINGS EASIER, NOT HARDER

Digital workplaces have probably matured more in the past few weeks than in the past few years. With adoption and roll out done at such a frenetic pace, governance needs to be applied. It may feel slightly counterintuitive to move forward with governance measures at a time like this, but it comes down to making your platform easier to use, not harder, both during and after the pandemic.

ABOUT THE AUTHOR

Steve Bynghall is a freelance consultant and writer based in the UK. He focuses on intranets, collaboration, social business, KM and the digital workplace. Spark Trajectory provides training and development for intranet and digital workplace people. We cover strategy & planning, governance & operations and measurement & improvement. In partnership with Chris Tubb, I deliver workshops and training materials that help teams make their intranets and digital workplaces more successful and sustainable.

EXECUTIVE MANAGEMENT & TEAMS SPECIAL FEATURE

A Good Team Needs A Good Leader

If you want to have successful teams in your organisation, make sure you have successful leaders. What do I mean by this you ask? The way a team is led will have a major impact on the success or otherwise of the team, particularly when a lot of leaders are leading teams that are working from home or in a remote work location. Leadership challenges have changed so much over the last two years, so leaders need to be able to adapt.

BY LINDSAY ADAMS

When I asked team members recently from within a large multi-faceted organisation what they wanted from a team leader they identified the following values they would like their leader to hold.

- Trust
- A commitment to their staff as well as the task
- The willingness to support and serve the team
- Inspirational leadership, combined with energy, enthusiasm, and appropriate expertise
- The guts to take responsibility rather than pass the buck
- The glue to make the team come together and operate as a team
- A willingness to have fun!

I'll explain each of these in more detail.

TRUST

Team members want to trust and be trusted. Particularly with the advent of remote working this issue was huge. Team members felt it was important to be able to trust their team leader to do what they said they were going to do. Of course, this works both ways, team members also want to be trusted to uphold their part of the bargain and deliver the goods when asked to do so.

Modern day work systems enable team leaders to monitor their team's laptops remotely and team members sometimes resent what they termed as "remote spying".

Trust is the outcome of kept promises and is something that is earned, not bought or obtained easily. Trust was the number one issue raised by team members working in a remote work location.

Interestingly Microsoft reported a twenty percent increase in productivity worldwide since the beginning of the pandemic. Within my client base within Australia, many organisations have also reported huge upswings in productivity, when staff are given the trust to work remotely and get on with what must be done.

A COMMITMENT TO THEIR STAFF AS WELL AS THE TASK

Following on from the issue of trust most team members were more concerned about relationships within the team before they were concerned about the tasks the team was responsible for. Feeling valued and part of the team is an important component and allowed the team member to contribute as a valued individual.

This issue is another that has been impacted by the pandemic. Engaging with team members spread across a city or even the country has brought new challenges to leaders, who must now devise ways to connect, engage and support their team. Not only that they must bring their people together regularly, either online or face to face, to give them a sense of belonging.

A switched-on team leader will spend time supporting their staff and build a commitment to the team through this support. The team leader must never lose sight of the task but must also never lose sight of the value of the individuals within the team.

"... MANY ORGANISATIONS HAVE ALSO REPORTED HUGE UPSWINGS IN PRODUCTIVITY, WHEN STAFF ARE GIVEN THE TRUST TO WORK REMOTELY AND GET ON WITH WHAT MUST BE DONE.

THE WILLINGNESS TO SUPPORT AND SERVE THE TEAM

Team members want strong leadership, people who are willing to lead from the front, take responsibility and make the right decisions. Having said that, the overwhelming response to my survey in the large multi-faceted organisation was also that staff want a leader who is willing to lead from behind. By this I mean a leader who serves the team members, to enable them to get their job done and achieve within the constraints of the organisation.

This can sometimes be a delicate balancing act between getting the job done and catering to the needs of the individuals within the team. A leader who supports their staff by allocating appropriate resources or cutting red tape to achieve an outcome is highly valued by the team. This may at times be at odds with the organisational culture but again brings forward positive results in terms of productivity and loyalty.

INSPIRATIONAL LEADERSHIP, COMBINED WITH ENERGY, ENTHUSIASM AND APPROPRIATE EXPERTISE

Team members want to be inspired and have a leader who takes them to the next level. They want to be motivated and work with a leader who has energy for the task and the team. They want to work with a leader who can do this and has the appropriate knowledge about the task at hand to lead the team to where they want to go.

THE TEAM LEADER MUST NEVER LOSE SIGHT OF THE TASK BUT MUST ALSO NEVER LOSE SIGHT OF THE VALUE OF THE INDIVIDUALS WITHIN THE TEAM

People recognise that not every leader has all the answers, but they want to know the leader is real and can draw on the knowledge and experience of the other people around them in the team.

In one organisation I worked with an enterprising team leader, instituted Monday morning online brainstorming sessions to bring their people together and engender participation and contribution. These sessions proved to be a great way to start the work week and team members participated feeling part of something, which was fun and still contributed to the team outcomes.

THE GUTS TO TAKE RESPONSIBILITY RATHER THAN PASS THE BUCK

Teams and leaders are often put under a lot of pressure to achieve or perform in organisations. Team members want a leader who will take responsibility and work to quickly fix problems if and when they arise. This process must be one where the team grows as a result of the leader's actions.

This means the leader may have to admit the issue was their fault or a result of their actions.

This is not about finding a scape goat; it is simply about taking responsibility. Team members value leaders who are willing to admit they made a mistake and support them through the fallout from that mistake.

One critical piece in this scenario is communication and taking the time to regularly chat with everyone within the team. One middle manager confided to me that they had dropped the ball on this one, having made a mistake, then not owning it in front of their team. They admitted that taking the time to speak to individuals and admit their mistake eventually paid huge dividends in terms of team loyalty and commitment.

THE GLUE TO MAKE THE TEAM COME TOGETHER AND OPERATE AS A TEAM

A group of workers becomes a team when there is a synergy between the members of the group. Team members want to feel part of that group and be welcomed by the leader and others in the group as an equal member of the team. The team leader may have to experiment with different styles of leadership to bring the team together.

Again, working remotely can change the dynamic here very quickly. Recognising the strengths and weaknesses of team members, establishing accountability and clear roles are important steps in creating this synergy among team members.

A good team leader will recognise the need to adapt his or her style to fit the needs of the group. A leader within a government agency told me they instituted a ten-minute roll up for their team every morning. Every team member Zoomed in from their location to give a quick update and agree on priorities for the coming day.

The team leader likened this to a habit she had used previously, having everyone gather for a stand-up meeting at the beginning of every day in the office. Due to technology, they no longer had to stand, however she kept the meetings short, sharp, and informative.

A WILLINGNESS TO HAVE FUN

Finally, the team members I surveyed unanimously wanted to have fun at work. Comments abounded about the best team leader was the one who made work fun and working never seemed like a chore because it was so enjoyable.

FUN IS COMPULSORY IN SUCCESSFUL TEAMS, HOW CAN YOU CREATE MORE FUN FOR YOUR TEAM?

There are so many ways to generate fun, even if your team is working from home. A financial services group I work with used to have Friday afternoon drinks around 4pm in the office. Because of the pandemic, they hadn't been attending the office for the longest time. One of the team lamented the fact that Friday afternoon drinks were no longer possible.

This spurred the owner of the business into action, he first booked a team Zoom call for 4pm the following Friday. Next, using the services of a national bottleshop chain, he organised for a bottle of each staff members favourite tipple to be delivered as close to 4pm as was possible on the next Friday. Can you imagine the fun they all had at that meeting sharing their delivery surprise!

ABOUT THE AUTHOR

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BY LINDA SHAVE

A Hybrid Model for Workplace, Remote Working and Virtual Team Management

The global crisis caused by the COVID-19 pandemic has seen the acceleration of hybrid models and approaches to working to deliver business continuity. As organisations continue to adapt to this new way of working, executive management and leaders at all levels are focusing on developing high performing hybrid teams with effective strategies to shape and shift the workplace dynamics.

WHAT IS A HYBRID WORK MODEL?

A hybrid work model is the mixture of three elements, the conventional onsite workplace, remote working, and virtual teams. The future of work involves a digital savvy workforce and the move towards a hybrid working model. Hybrid working impacts all aspects of traditional organisational work, the workforce, and the workplace. Hybrid work is a cross-functional effort therefore it will require executive management and leaders to rethink, redesign, and re-architect workplace models, create new strategies for managing the workforce, identify and align priority actions, shared goals, and foster employee wellbeing.

Conventional Onsite Workplace

Fundamentally, the traditional workplace will operate as normal. The primary difference might be the balance of onsite workers in the workplace and those working remotely. This may require executive management and leaders to rethink how the two can work together across the digital divide. For example, in a traditional workplace two colleagues can discuss face to face a particular problem and/or seek clarification.

In a hybrid environment the two colleagues if one is working remotely, will need to send emails to have a discussion and/or schedule a virtual meeting to discuss the problem. This changes the dynamics and could cause delays in traditional tasks and activities and the autonomy around these two needs ultimately depends on future work models.

Remote Working

The ability to work remotely requires a digital workforce of individuals who have a good understanding of the technology, tools and the processes involved in completing their work. They need good communication and collaboration skills as well as a high level of digital competence and dexterity for them to be successful. They also need to be self-motivated and able to work unsupervised.

Virtual Teams

Virtual teams may take on many forms, have different objectives, and solve different and diverse tasks. However, they all have two traits in common these are:

- Two or more people work together to achieve common goals.
- At least one of the team members works in a different location, for example remote working from home.

Because of these two key features, virtual teams can communicate and collaborate by means of videoconferencing using tools such as Zoom or Microsoft Teams.

EFFECTIVE STRATEGIES TO SHAPE AND SHIFT THE WORKPLACE DYNAMICS

Developing, implementing and maintaining a workplace hybrid model needs executive management and leaders to consider the changing philosophies on managing the workplace, remote workers and virtual teams. When re-architecting the work model, executive management and leaders need to consider the autonomy and scenarios around the 'when and where' and the 'how and what' work is to be experienced and completed, employee empowerment and their wellbeing.

Effective workplace strategies need to be established and incorporated into the overall organisational strategy. Thus, the following need to be considered:

- ✓ Redefine workforce roles for the new hybrid workforce
- ✓ Identify any digital skill gaps within the workforce
- ✓ Redesign organisational structures
- ✓ Produce a skills inventory
- ✓ Redesign, develop and communicate new educational and professional development models
- ✓ Enable cross-functional collaboration
- ✓ Identify any isolation or employee wellbeing issues

> "Ideas are powerful because they allow us to see the world as it could be, rather than what it is."
>
> - Jason Silva, Futurist, Philosopher, and Public Speaker.

Executive management and leaders might also need to determine how to balance the inherent risks and challenges that accompany fundamental changes around when and where, and how and what work is completed to deliver the best experience for employees, the organisation, citizen and/or customers. Executive management and leaders need to be conscious that remote workers and virtual teams can face challenges as they spend more and more time working apart (lack of face-to-face contact with colleagues) and the degree of separation in both working hours and physical distance increases. Executive management and leaders need to consider procedures such as:

Synchronise Work Schedules

Synchronising work schedules so that remote workers have common working times that fit in with the brick-and-mortar workplace, thus providing a flexible working practice for both onsite workers, remote workers, and virtual teams.

Clarify Roles

Remote workers and virtual teams need to have the same level of clarity, so right from the beginning remote workers and virtual teams need to know their role, who does what, how and when.

Communication and Governance

Remote workers and virtual teams will require a set of rules for communication and governance. They should plan a communication and governance strategy that maximises connectivity and collaboration whilst mitigating risks. Virtual team meetings provide an opportunity to bring remote teams together, but it does require advance preparation, communication, and guidance on governance activities such as how to manage information and records management functions remotely, privacy, security, and intellectual property.

Training and Support

Ensuring that all employees on site workers, remote workers and virtual teams have access to training is a crucial ingredient to employee wellbeing and providing an environment that supports an all-inclusive approach.

The training should include technical training, policy training, information that can and cannot be shared within a remote and virtual team digital workplace, how to properly handle personal data, governance training and recordkeeping requirements.

TABLE 1 - Example 5 Step Approach to Planning and Conducting a Virtual Team Meeting

TITLE	ACTION
PRE-MEETING	• Provide a clear agenda with time allocations • Post draft documents into a central location and request all team members to comment on them
START MEETING	• Bring the team together with informal discussion • If recording the meeting advise the team members that the session will be recorded • Commence meeting with first agenda item
DURING MEETING	• Keep team members engaged throughout the meeting • Create and rotate note-taking responsibilities among team members • Be sure to obtain everyone's input on topics, discussions and decisions (this can be through virtual chat workspace)
END OF MEETING	• End with a list of action items and post them to the team's workspace • Action items may include task assignments and due dates for completion • Try the "minutes-on-the-go" practice, where minutes are logged during the meeting and appear immediately on the virtual chat workspace screen • Remember to apply any governance and recordkeeping requirements
BETWEEN MEETINGS	Employ electronic communications to share both formal and informal news, progress etc. with remote workers and virtual teams

THE FUTURE OF WORK INVOLVES A DIGITAL SAVVY WORKFORCE AND THE MOVE TOWARDS A HYBRID WORKING MODEL.

Feedback to Remote Workers and Virtual Teams

Feedback is critical for maintaining team harmony and identity in both a remote and virtual team environments. Being proactive in monitoring team performance allows managers to provide feedback in real time, keeping the team on track, empowering, and encouraging remote workers and virtual team members.

Example Strategy on How to Plan and Conduct a Virtual Team Meeting

Table 1 provides you with an example 5 step approach to planning and conducting a virtual team meeting.

TABLE 2 - Sample Skills for the Modern Leader

WORKING	• Business savvy • Agile – Adaptable • Entrepreneurialism • Leadership (including persuade, encourage and support) • Communication • Interpersonal, collaboration, teamwork • Lifelong learning
THINKING	• Creativity • Innovation • Critical thinking, problem solving and decision making
TOOLS	• Technology • Intelligent Information Management (Data Science) • Digital and technology literacy • Analytics • Robotic and Intelligent Process Automation • Artificial Intelligence • Keeping up to date with evolving technologies and trends

LEADERSHIP AND HYBRID WORK MODELS

The new era of hybrid working will require strong leadership skills to navigate and drive cultural and organisational change. The modern leader will need to take on an entrepreneurial mind-set to successfully drive these changes and be able to persuade, encourage, support and enthuse the embryonic workforce through this period of upheaval.

Leadership skills will require a fusion of technology, business knowledge, openness, adaptability, critical thinking, problem solving, communication, entrepreneurialism, innovation, and interpersonal skills. These can be grouped into three categories, working, thinking and tools. **See Table 2.**

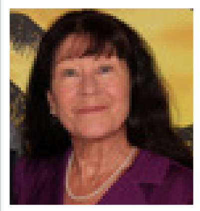
This type of leader will provide positive leadership to build, support and grow a healthy hybrid working environment. An environment that encourages innovation, knowledge sharing and an entrepreneurial way of working for the benefit of the organisation and its sustainable future.

THE MODERN LEADER WILL NEED TO TAKE ON AN ENTREPRENEURIAL MIND-SET TO SUCCESSFULLY DRIVE THESE CHANGES AND BE ABLE TO PERSUADE, ENCOURAGE, SUPPORT AND ENTHUSE THE EMBRYONIC WORKFORCE THROUGH THIS PERIOD OF UPHEAVAL.

LEADERSHIP IS KEY TO CHAMPIONING YOUR TEAM REGARDLESS OF WHETHER THEY ARE ONSITE, REMOTE, OR VIRTUAL

The social and economic crisis caused by the current COVID-19 pandemic is an example of the types of challenges executive managers and leaders have had to face. In these uncertain times, however, quick decisions have been essential; as we have seen with onsite, remote, and virtual teams, these exceptional circumstances have called for a more human-centric leadership style.

Coupled with this new and evolving hybrid working models is the need for new rules, new tools, and new ways of thinking, working, upskilling, and reskilling the current and future workforces. The recent past has required some creative thinking, leadership, and agility to maintain both the old physical and new digital hemispheres.



ABOUT THE AUTHOR

Linda Shave, FRIM is acknowledged as a thought leader and architect of change. She is a researcher, consultant, educator and author on topic areas such as intelligent information management, artificial intelligence, robotic process automation, privacy, and security. Linda is a gold laureate winner for Government Innovation and has an interest in data science, robotics, and quantum computing. Linda is a member of numerous professional organisations. Linda can be contacted at linda.bizwyse@gmail.com

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5 THINGS to Consider Before Making M365 Your Only Privacy and Compliance Strategy

BY GWENDOLINE HURET

WHY ARE COMPLIANCE OWNERS TURNING TO MICROSOFT?

M365 is the clear market leader when it comes to data collaboration. SharePoint, Exchange, and Teams have become enterprise references, and remote working has only solidified the trend. Employees share files and messages during video calls on Teams and use OneDrive and Office Online to create, collaborate, and share data.

Before you think of putting all your eggs – including privacy and compliance technology – in the Microsoft basket, there are some key things to consider.

Without making this another whitepaper about the importance of privacy, let's agree on the basics: data breaches are consistently rising in number and scandal size, and no one is left unaffected. It is plausible to argue that the pandemic is responsible for this increase in security leakages. Privacy is top of mind for anyone responsible for data management. These breaches are an undeniable global movement that I witness first-hand in my work.

Data owners and compliance officers are like anyone else, and they tend to go with what they know. Therefore, it should come as no surprise that more and more companies are turning to M365 to protect and manage their information on top of the collaboration role it already provides.

Microsoft has recognized the importance of data security and responded with privacy offerings around their solutions: users and administrators can now work with concepts such as sensitivity labels and retention schedules.

Then why are compliance and privacy add-ons to M365 also thriving?

Whether you already have a data management solution and are looking to switch to Microsoft, or you are starting from scratch, here are five things to consider that will enhance your privacy strategy:

1. PRIVACY BY DESIGN

We are very familiar with the dichotomy of data classification requirements in the records management business. Business users want their data classified with easy access according to the projects they are working on, whilst data managers want their data classified according to its privacy and retention requirements. These two classification systems will inevitably contradict themselves. Let me convince you with an example. The ultimate productivity classification will allow a record to be shareable with anyone (perhaps even externally to the organization in some cases). The ultimate privacy classification will allow no one to see it. Companies must merge the two extreme and non-sensible requests to develop a workable intermediate: controlled access that is as limited as possible whilst still allowing optimal collaboration, which might require occasional sharing of data outside the company.

When we look at data software, it can be designed with a collaboration perspective first or a privacy perspective. A collaboration perspective will give lots of flexibility to users on how data is classified and accessed. In contrast, a retention-based perspective will think first of the retention, next of the ability to share and work with the data. Because both perspectives contradict each other, one must come first in the design, with priority over the other. Obviously, in an ideal solution, both designs are considered, but one must have priority.

MICROSOFT IS A HOUSEHOLD NAME FOR COMPANIES AND INDIVIDUALS WHO WANT TO CREATE AND COLLABORATE WITH INFORMATION. THEIR PRODUCT DESIGN IS COLLABORATION FIRST AND, BECAUSE OF THE CONTRADICTION EXPLAINED ABOVE, NOT PRIVACY FIRST.

Microsoft is a collaboration leader and a household name for companies and individuals who want to create and collaborate with information. Their product design is collaboration first and, because of the contradiction explained above, not privacy first.

Though Microsoft has started to understand the customer request for privacy and responded with no less than three separate admin consoles in Microsoft 365 for administrators to view or configure security and compliance policies, it has never been a front-runner in privacy solutions. M365 is not a recognized market leader in the compliance space.

Whilst Microsoft is busy turning a collaboration solution into a privacy solution, the industry's leading privacy and compliance software now must do the opposite. It has become indispensable for these compliance offerings to closely integrate with M365 to protect the created and shared data. Some offerings specialize only in M365, whilst others will protect data enterprise-wide.

These privacy add-ons to Microsoft would not exist or thrive if Microsoft were a privacy-by-design solution. The two need each other so collaboration and compliance can meet halfway.

When looking at a privacy solution, determine if the design is privacy-first. The sophistication of the solution will usually point you towards the answer. For instance, how is auto-classification handled? How advanced are the sensitive data labels? Is priority given to the end-user's productivity or compliance and security?

2. COMPLIANCE ACROSS A HYBRID ENVIRONMENT

I want to talk about a customer (completely anonymized in this story) who works in an industry where data privacy could be considered a matter of life or death.

Several years ago, and some Microsoft marketing later, this customer decided that Microsoft's privacy offerings would allow them to retire their existing privacy solution. They chose to stop investing in the historical compliance market leader they were using and went full steam towards an M365 privacy solution - Records Center. This case study is critical because it represents the current trend we see in the market, for the reasons explained in our introduction.

The first issue that the customer stumbled upon was that their environment, as with most customers today, was hybrid and spread across an on-prem and Azure cloud environment. The on-prem environment is legally required in their country to manage certain types of information, so there was no plan of this environment ever being non-hybrid. That is also the case for many industries and geographies.

Anyone with a hybrid environment should know that Microsoft offers one privacy solution for on-prem environments and a separate one for the cloud. The two offerings must be separately implemented and do not speak to each other. In fact, it was impossible for this customer to even import/export any policies from one tool to the other. An ideal privacy solution should have one central dashboard for policy management, which gets universally applied across all data sources. Privacy stakeholders are not usually technical. They are business users who find the source of the data almost irrelevant, a prerequisite to making strategic decisions. The information must be displayed in one place for a human brain to make sense of it.

Not only did the two products not communicate, but as the Microsoft strategy is cloud-first (as it should be), the on-prem privacy solution (which contained the most sensitive data) had less functionality than the cloud solution. Anyone with an on-prem solution handling any type of data that by local regulation needs to be kept on-premise (child data or government data in many countries) is bound to find this a permanent issue.

3

3. THE IMPORTANCE OF CENTRALIZED RULE MANAGEMENT

Not having a central dashboard to understand or report on data management is also present within each instance (cloud or on-prem) of the M365 offering itself. We mentioned earlier that Microsoft offered various consoles for managing compliance. Whether a user is using Records Center, DLP rules, a content organizer rule, a compliance center rule, or a hold rule, these different moving parts are not reflected or reportable from one central location and are all configured and managed in different areas. An end-user or even an admin would struggle to understand which rules apply to what sites, let alone individual files. There is no universal reporting functionality to explain how the data is managed overall. Whilst Microsoft has undeniably been investing in compliance functionality in the last few years, the privacy design is still not regrouped but a sum of various moving parts.

This situation takes us back to the importance of privacy by design, which is required to form a solution with one such central dashboard. A collaboration-first and privacy-second solution will struggle to offer such a view. When investing in a privacy solution, try to determine how you can report what your solution is doing for your company. If you can't understand or report on it, the usefulness of the compliance functionality will be limited, and the solution will be highly prone to human error.

4

4. ENTERPRISE-SCALE MIGRATION OF HISTORICAL DATA

Migrating from a historical privacy solution (or from no solution) to an M365 compliance offering requires an enterprise-scale data migration for any content not created within M365. In our real-world example above, migration became a significant issue. The customer tried migrating over 200 million records from various data sources and found that with such high volumes, the performance delivered was not to be acceptable when attempting to migrate content to SharePoint. The customer specified that they had SharePoint experts on the team, and the cost was not a concern to them, implying this was purely technology related.

The company attempted the migration for over a year. Performance was not satisfactory, and neither was the privacy functionality. The customer concluded that migrating content from non-Microsoft sources into SharePoint was very challenging, especially with high data volumes. Metadata had to be mapped manually, and the SQL servers took a performance hit. The data sources were nothing exceptional, and the data that had to be migrated was in a file system, one of the most common locations for data in a company.

Before opting for an M365 privacy strategy, consider what impact such data migration might have on your organization and assess the quantity of data currently outside SharePoint or OneDrive. Could a manage-in-place alternative be more adaptable? Try to test or consider how such a large migration to SharePoint would work for you. Having an estimated timeframe of how long it takes your organization to import large quantities of data into SharePoint is a good start. Then compare that to staying with your current vendor (no migration) or to a competitor who might have more comprehensive importing features. Whatever solution you choose, managing in place and minimizing migration is usually a winning strategy.

5. HUMAN ERROR

One saying which I find adapts itself very well to compliance is, "You're only as strong as your weakest link". Unfortunately, when it comes to software, the weakest link is usually a human.

Customers who opt for any privacy solution should consider, "How will this change be adopted, and how will it be managed?" Hint: the best solution can run as automated as possible, with as little interaction from the end-user as manageable.

The problem of human error starts from as early as the initial setup or rule configuration.

When our real-life customer chose to opt for M365 privacy solutions, due to the migration issues stated above, they decided content should be created straight from OneDrive/SharePoint and then managed from there. Employees were notified, but they only partly followed the new instructions. In one year, 1 million records were created in SharePoint and then managed from a privacy perspective.

"YOU'RE ONLY AS STRONG AS YOUR WEAKEST LINK". UNFORTUNATELY, WHEN IT COMES TO SOFTWARE, THE WEAKEST LINK IS USUALLY A HUMAN.

The estimate of what that number should have been was 2.5 million. Therefore, the customer estimates that over half of their sensitive data was not declared correctly in Records Center.

According to the customer, the problem lies at the heart of the Records Center design, which relies on users to declare content as a record (by moving it to Records Center) before it can be managed. The customer mentioned that the difficulty in configuring Records Center also left them unsure whether it was functioning correctly. Privacy experts know that users should not be expected to manually contribute to privacy policies, but that was how this solution appeared to work. In addition, the tool was unable to automate record declaration in some cases, so users were left with the responsibility to identify them. This is known to be a bad strategy in the compliance space. Users do not want to be burdened with records management, which is one of the key reasons most leading compliance tools do this automatically and behind the scenes.

Records Center was found hard to use by records managers, both for setting up and running policies. They also found that with SharePoint updates, the tool sometimes stopped working.

Much more frightening than records not being correctly declared, the customer found that if a record admin deleted a site that contained records, Records Center did not prevent the deletion even when confidential documents under a policy were affected. Let me restate that: the M365 privacy solution did not prevent records from being randomly deleted. The customer's experience with the solution involved records not being correctly declared and deleted.

Thus, when selecting your privacy strategy, consider human error and remember that human error covers both declarations of records and initial setup and rule configuration. How automated is the configuration of your privacy tool? How complex is the setup? Does it work cross-site level? Does it have a central dashboard? Setup, configuration, and daily use are all areas to be considered for ease of use. Remember that the easier and more intuitive your solution, the lower the long-term maintenance costs, particularly when it comes to user onboarding and training.

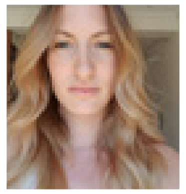
WHAT TO LOOK FOR IN A PRIVACY SOLUTION

The customer in our case study changed their strategy and decided to return to their historical vendor. We can't all specialize in everything. Some vendors have years of experience being market leaders in the Privacy and compliance space. Microsoft has only seriously considered the issue recently. Try sending a Teams invite to your customers and marvel at how they can all view each other's email addresses. [There is a theoretical option to prevent this but hitting "reply all" serves as a simple security flaw that immediately reveals all emails of the call guests.]

Privacy is not top of mind in M365 design, which makes sense because they are focused on building the best collaboration tools, not compliance.

Many compliance tools on the market integrate with SharePoint, and there's a reason these are thriving. Look for a tool that integrates seamlessly with automated and smart classification rules to not burden the end-user. M365 privacy companion tools should be able to manage in place, retire records from SharePoint, and manage them in a separate location. It goes without saying: look for an industry leader that offers all the compliance functionality you will need: automated but controlled deletion, flexible and smart retention schedules, and tight security. A strategic choice would be a companion that manages not only SharePoint or M365 but your enterprise data in general. In the real world, data is hybrid. It's everywhere and in all kinds of formats. I recommend a unique dashboard that allows you to make sense of how you manage information and your general policies. Look for a solution that is intuitive to your admins as well as your end-users.

Although not mentioned in this case study, structured data should also be part of any long-term compliance strategy, so look for a solution that handles that, too.



ABOUT THE AUTHOR

Gwendoline Huret has over 10 years of experience in Enterprise Software for Data Management and is now working as Product Manager at Micro Focus. She has specialized in privacy and cyber-security since the start of the GDPR in 2016. She has worked on data management projects across the globe, from coding to sales to product management. Gwendoline has a Masters in Mathematical Engineering and is based in Madrid, Spain. She has dual French and British nationality.

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MICRO FOCUS

Managing information in a pandemic:

Microsoft 365 – A Case Study

BY CLAIRE BOYLE

With the challenges of the last year and a half, many organisations have been forced to adapt to new ways of working and implement new technologies, perhaps earlier than they would otherwise have done so. While the increased use of remote-working technology offers many wonderful opportunities for organisations, for information managers it can cause a bit of a headache.

Although my organisation's journey of information management within Microsoft 365 began before lockdown did, the sudden move to working from home certainly increased the popularity of Teams, and so it felt pertinent to look at how we manage information in the Microsoft 365 suite, as part of the Coping with COVID edition.

It's important to set out at the start that this is not a guide on how to perfectly manage information in Microsoft 365, nor is it a claim that the organisation has completed its implementation. Rather it's an account of what controls the Information Governance team have been putting in place, why those were chosen and whether we believe it has worked.

Microsoft 365 was purchased by the organisation some years ago, with the main driver being Outlook, but the organisation quickly realised that there was more to be exploited than just e-mail. Today, we make use of many of the tools, but from an information governance point of view, the ones that have had some level of control implemented are SharePoint, Teams and OneDrive.

Information Governance has deployed, and still is deploying, SharePoint across the organisation as a corporate information storage tool, replacing our use of shared drives. IT led the rollout of OneDrive, again replacing the use of network drives for personal storage. And Teams, although subsequently picked up by IT as a replacement for Skype, was largely found by the business areas themselves.

Starting with the biggest repository of information in the Microsoft 365 suite, SharePoint, Information Governance launched a project in 2019 to transfer all our corporate information from shared drives into the system.

Rather than replicating the existing folder structure, which was large, unwieldy and out of date (in terms of organisational hierarchy) a structure was built based on a business classification scheme, which focused largely on organisational function, rather than on teams and departments. By building the Document Centre (as it would come to be known) this way, we are in a much stronger position to be able to map our retention requirements and weather any future organisational change.

Our controls around the Document Centre are much greater than in any other Microsoft tool. The information within it is structured, and subject to comprehensive retention rules, run through Records365, a RecordPoint product. Changes to the structure, access to the information through security groups and the availability of metadata is all approved through Information Governance before being implemented.

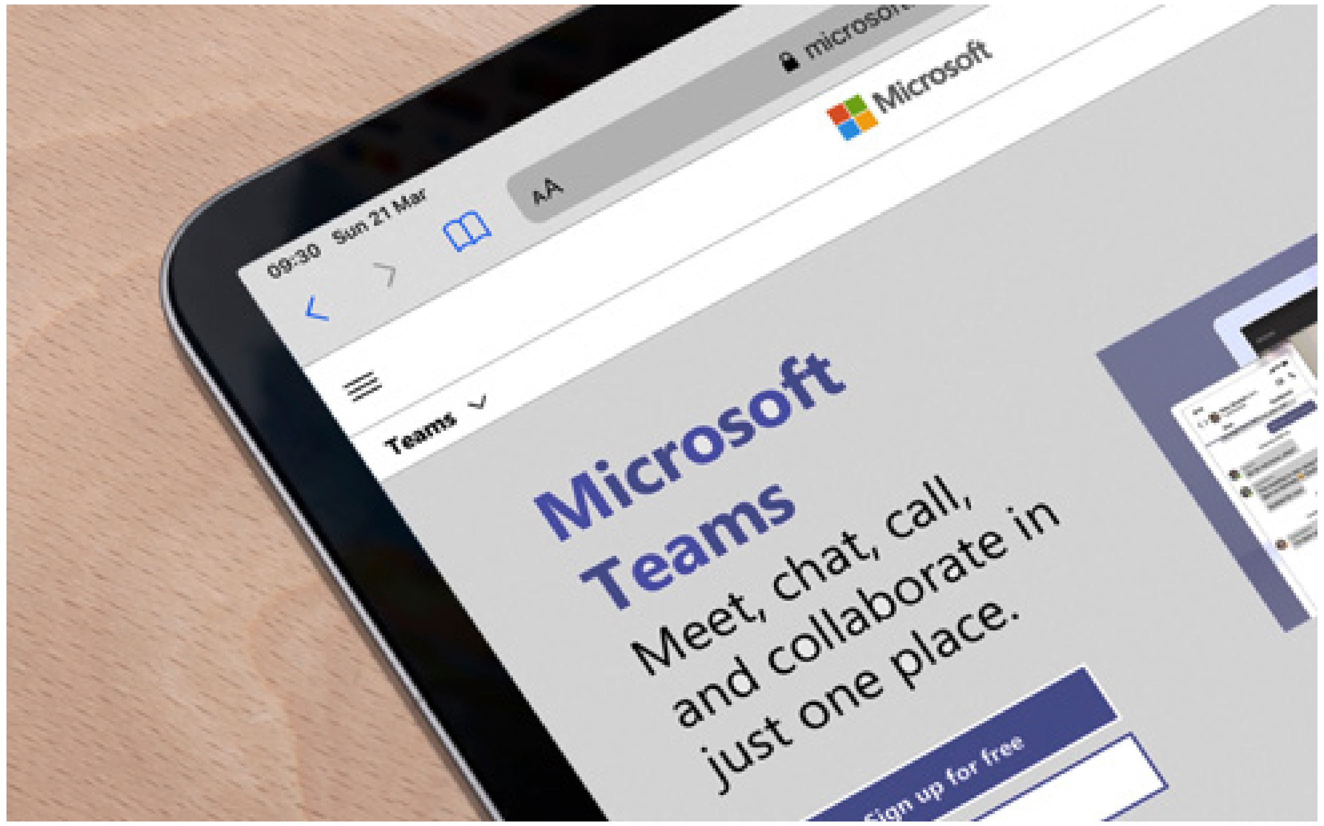
This gives the organisation peace of mind that its corporate information is managed in a secure and compliant manner and ensures that the Information Governance team's visibility of the information it manages is retained.

The biggest lesson that has been taken from adopting this kind of approach is to do with culture change. An organisation can have a team of 30 information professionals and the best technology in the world, built on perfect information management principles, but if their people are not on board and doing what is required of them, then the system will fail. The trick is in the balance – staff shouldn't feel like they need to be records managers to do their job, but, at the same time, they need to be confident in using the system to enable the actual records managers to get what they need to do their job.

THIS GIVES THE ORGANISATION PEACE OF MIND THAT ITS CORPORATE INFORMATION IS MANAGED IN A SECURE AND COMPLIANT MANNER

Moving from a largely team-based system, with lots of quirks born from legacy to a functional-based system is a massive change for staff. One of the ways this was addressed was by getting users involved from the start. By using the business classification scheme as a starting point, changes could be suggested by users and the final structure could still be mapped back to the original business classification scheme, and therefore, the retention schedule. Given the size of the change, it is not surprising that there are inconsistencies in how it is being adopted and used, but by being flexible, continuing to engage users and making changes and updates to the structure where necessary, there is confidence that good information management will continue to become embedded, at least in SharePoint.

Next, in terms of information storage, is probably Teams, at least from a corporate information point of view. Teams is a system that was discovered by business areas and requested from IT. In response to demand, particularly after COVID-19 hit, the Information Governance team realised that some control was needed before the organisation accumulated hundreds of information repositories outside of the main corporate storage.



THE IDEA WAS TO LIMIT STAFF'S ABILITY TO CREATE SITES INDEPENDENTLY, AND GIVE THE TEAM VISIBILITY OF EACH SITE, AND THEREFORE, EACH INFORMATION REPOSITORY, WHILST NOT IMPACTING ON THE ABILITY OF STAFF TO USE THE SOFTWARE IN WHICHEVER WAY MET THEIR IMMEDIATE NEEDS.

Given the size of the SharePoint migration project, the team aimed for minimal but effective governance. The idea was to limit staff's ability to create sites independently, and give the team visibility of each site, and therefore, each information repository, whilst not impacting on the ability of staff to use the software in whichever way met their immediate needs.

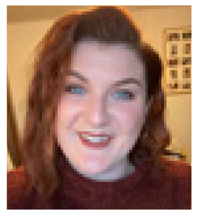
So far, this approach has proved quite effective. Each Team is approved by Information Governance and added to a register, as well as having a 2-year blanket retention applied to discourage long-term storage of information, but, beyond that, and some general good information management guidance, the use and management of Teams is largely left to business areas to control.

One of the benefits of this light-touch approach is the flexibility it allows. The way Teams is used and promoted is changing constantly, so, as an organisation, we need to be flexible and able to adapt to new approaches and changed in the technology. It also means that the resource required to manage the governance of Teams and the information within it is nominal.

Some of the challenges that have been encountered with this approach is the demand from staff to use it as a longer-term storage option, particularly as it offers them more freedom than the SharePoint structure. In addition, Teams is highly promoted by Microsoft as the primary tool for, particularly remote working, but by creating a Teams site for a department to operate out of, you immediately introduce information silos and make the sharing of and collaboration on information more difficult cross-organisationally. Despite these challenges, the organisation is successfully using Teams in a relatively controlled manner, and Information Governance have retained visibility of the information, reducing the risk of any nasty surprises in the future.

The last tool concerning the storage of information currently deployed within the organisation is OneDrive. The implementation of OneDrive as a personal storage location was led by IT, rather than Information Governance, although there was involvement from the team. OneDrive has been rolled out solely as personal storage within the organisation, and Information Governance advocate that any corporate work, including drafts, should be held in the Document Centre. The level of governance that has been implemented on OneDrive, however, is negligible. A storage cap has been added to try and encourage staff not to use it for their day-to-day work, and guidance has been issued on how it should be used. Otherwise, there are no information governance controls placed on OneDrive.

One of the main lessons that has been learnt through the implementation of all three tools is that, ultimately, you can't stop people using the tools they're given how they feel is best, but what you can do is ensure that the guidance and controls are there that encourage the right tools to be used in the right way. I like it think of it as bumpers on the bowling alley: you might not be able to control the direction of the ball, but you can control where it ends up.



ABOUT THE AUTHOR

Claire Boyle started her information management career in 2013 and has worked for organisations such as The University of Edinburgh and the National Records of Scotland. She currently works as a Records Manager at Historic Environment Scotland and is heavily involved in migrating the organisation to SharePoint. She holds an MLitt in Archives and Records Management, and is an accredited member of IRMS, regularly delivering webinars and getting involved with the IRMS Scotland Group.
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PART ONE

Project Cortex and the future of document management in Office 365

BY JAMES LAPPIN

To understand Microsoft's strategy for document management in Office 365, it is more instructive to look at what they are doing with Delve, MS Teams and Project Cortex than it is to look at what they are doing with SharePoint.

What has changed is that cloud suites, such as Office 365 and G Suite, have created a much closer relationship between document management systems and the other corporate systems holding 'unstructured' data, such as e-mail systems, file shares and instant messaging (IM)/chat. This closer relationship is fuelling developments in the artificial intelligence (AI) capabilities that the big cloud providers are including in their offerings. Project Cortex, set to come to Office 365 during 2020, is the latest example of an AI capability that is built upon an ability to map the interconnections between content in the document management system and communication behaviour in e-mail and chat.

SHAREPOINT IN THE ON-PREMISE ERA

In its on-premise days, SharePoint was, in many ways, a typical corporate document management system. It was the type of system in which:

- colleagues were expected to upload documents, add metadata and place documents within some kind of overarching corporate structure;
- information managers would work to optimise the information architecture and, in particular, the search capability, the metadata schema and the structure of the system;
- retention rules would be held and applied to content.

It was the type of system that an organisation might call their 'corporate records system' on the grounds that documents within the system were likely to have better metadata and be better governed than documents held elsewhere.

SHAREPOINT IN THE CLOUD ERA

In Office 365, SharePoint's role is evolving differently. Its essential role is to provide document management services (through its document libraries) and (small-scale) data management services (through its lists) to the other applications in the Office 365 family and, in particular, to MS Teams.

SharePoint can still be configured to ask users to add metadata to documents, but users have three quicker alternatives to get a document into a document library:

- If the document library is synched with their Explorer, they can drag and drop a document from anywhere on their computer drive into the document library.
- They could simply post the document to a channel in their Team in MS Teams, which will place it in the document library in the SharePoint Team Site associated with the Office 365 group that underpins their Team.
- They could post it to a private channel in a Team, which would cause the document to be stored in a document library within a site collection dedicated to that private channel.

SharePoint can and should still be given a logical corporate structure, but MS Teams may start to reduce the coherence of this structure. Every new Team in MS Teams has to be linked to an Office 365 group. If no group exists for the Team, then a new group has to be created. The creation of a new Office 365 Group provisions a SharePoint site in order to store the documents sent through the channels of that Team. Every time a private channel is created in that Team, it will create another new SharePoint site of its own.

THE MOVE TO THE CLOUD HAS HAD A MASSIVE IMPACT ON DOCUMENT MANAGEMENT, DESPITE THE FACT THAT DOCUMENT MANAGEMENT SYSTEMS (SUCH AS SHAREPOINT) HAVE CHANGED RELATIVELY LITTLE.

SharePoint still has a powerful Enterprise search centre within it, but it is rivalled by Delve, a personalised search tool that sits within Office 365, but outside SharePoint. Delve searches not just documents in SharePoint, but also in OneDrive for Business and even attachments to e-mails.

SharePoint can still be configured to apply retention rules to its own content through policies applied to content types or directly to libraries. However, a simpler and more powerful way of applying retention rules to content in SharePoint is provided outside SharePoint, in the retention menu of the Office 365 Security and Compliance Centre.

This retention menu is equally effective at applying retention rules (via Office 365 retention policies and/or labels) to SharePoint sites and libraries, Exchange e-mail accounts, Teams, Teams chat users and other aggregations within the Office 365 environment.

MICROSOFT'S ATTITUDE TO METADATA

Microsoft's Office 365 is a juggernaut. It is evergreen software, which means that it has regular upgrades that take effect immediately. It faces strong competitive pressures from another giant (Google). It needs to gain and hold a mass global customer base in order to achieve the economies of scale that cloud computing business models depend on.

Information architects of one sort or another are part of the ecosystem of Office 365. Like any other part of the Office 365 ecosystem, information architects are impacted by shifts, advances and changes in the capabilities of the evergreen, everchanging Office 365. Suppliers in the Office 365 ecosystem look for gaps in the offering. They don't know how long a particular gap will last, but they do know that there will always be a gap, because Microsoft are trying to satisfy the needs of a mass market, not the needs of that percentage of the market that have particularly strong needs in a particular area (governance, information architecture, records management etc).

ON PREMISE DOCUMENT MANAGEMENT	CLOUD ERA DOCUMENT MANAGEMENT
Stand-alone document management systems.	Document management as one 'workload' within a cloud suite.
Document management system badged as 'the record system. Fileshares, email systems and IM/chat systems sit outside of theis record system.	Document management, email, fileshares and IM/chat are interdependent workloads in one cloud suite
Records retention functionality built into the document managment system	Records retention functionality sits outside of the document management workload and is used to apply rules to content created in all the different workloads of the suite.
Metadata schema that specifies metadata fields wtihin the document management system	Enterprise social graph that maps people to documents and topics. The graph is built from the interactions of people with content across the different workloads of the suite.
Search engine that crawls the document management system and ranks resoluts based on metadata entries.	Search engine that crawls the cloud suite. Artificial intelligence tool that uses the enterprise social graph to personalise the search results adn to push recommendations of people adn content to individual members of staff.

INFORMATION ARCHITECTS OF ONE SORT OR ANOTHER ARE PART OF THE ECOSYSTEM OF OFFICE 365.

The niche that SharePoint information architects have hitherto occupied in the Office 365 environment will be changed (but not diminished) by Microsoft's strategy of promoting:

- Teams as the interface and gateway to SharePoint;
- Delve as the main search tool for Office 365;
- the forthcoming Project Cortex as the main knowledge extraction tool;
- the Security and Compliance centre as the main locus of retention policies.

Microsoft's need to win and keep a mass customer base means that they need document management to work without information architecture specialists, because there are not enough information architecture specialists to help more than a minority of their customers.

Microsoft's plans for SharePoint to be a background rather than a foreground element in Office 365 will take time to run their course, and that gives us time to think through what the next gap will be. What will be the gap for information architects after SharePoint has been reduced to a back-end library and list holder for Teams, Delve, Cortex and the Microsoft Graph?

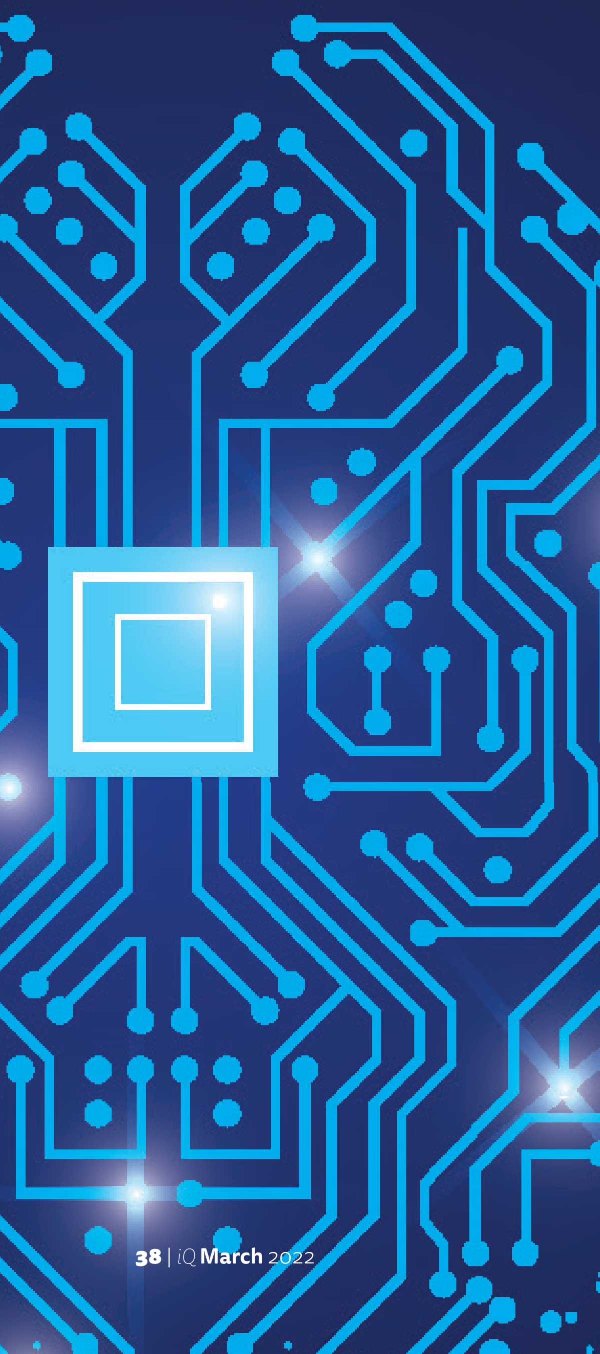
To come up with a proposed answer to this question, this paper will explore in a little bit more detail how and why Microsoft's document management model has changed between the standalone on-premise SharePoint and SharePoint Online, which is embedded in Office 365.

INFORMATION MANAGEMENT

THE ON-PREMISE CORPORATE DOCUMENT MANAGEMENT SYSTEM MODEL

On-premise corporate document management systems, up to and including the on-premise SharePoint, were built on the assumption that a corporate document management system could stand separately from the systems (including e-mail systems) that transported documents from person to person.

This assumption had been based on the idea that good metadata about a document would be captured at the point that it was entered into the system and updated at any subsequent revision. This metadata would provide enough context about the documents held in the system to render superfluous any medium- or long-term retention of the messages that accompanied those documents, as they were conveyed from sender to recipient(s).



The model depended on a very good information architecture to ensure that:

- every person (or machine) uploading a document to the system was faced with a set of relevant metadata fields.
- these metadata fields were backed, where necessary, by controlled vocabularies, that presented a set of coherent and contextually relevant choices for metadata values.

The problem with this model is that it is not feasible to design an information architecture for a corporate wide standalone document management system that describes documents in a way which means that documents across all of an organisation's different activities are understandable and manageable. You can achieve this for some parts of the system, but not for the whole system.

There are two ways you can set up an information architecture: top down or bottom up. Neither approach works on a corporate-wide scale:

- In the **top-down approach,** you define a corporate-controlled vocabulary for every metadata field that needs one. The trouble with this is that, for any one individual user, the vast majority of the values of those vocabularies would be irrelevant, and they would have to wade through all these irrelevant values every time they wanted to upload a document to the system.
- In the **bottom-up approach**, you define locally specific vocabularies. SharePoint was and is particularly good for this. For any particular document library, you can define vocabularies tailored specifically to the content being put into those libraries. However, then you have the problem that an implementation team in a medium or large organisation does not have the time to define locally-specific metadata for every single area of the business.

There is a way by which this information architecture problem can be solved. It involves:

- mapping different controlled vocabularies to each other, so that the choice of a metadata value in one field removes any conflicting values in the controlled vocabularies of any other metadata field.
- mapping metadata fields to a user's role, so that any values in a controlled vocabulary that are irrelevant to the user are removed

This is already starting to look like a graph – like the Facebook social graph that drives search in Facebook, the Google Knowledge Graph that is built into Google Search and the Microsoft graph, which is the enterprise social graph that underpins Delve and Project Cortex in Office 365.

ENTERPRISE SOCIAL GRAPHS

An enterprise social graph is an established set of connections between:

- information objects (such as documents);
- the people who interact with those documents;
- the actions those people perform on those documents (saving them, sending them, revising them etc);
- the topics/entities (such as policy issues, projects, countries, regions, organisations and disciplines) discussed in those documents.

The deployment of a graph significantly reduces the reliance of a system on metadata added by an end user (or machine) at the time of the upload of a document into a system. The mere fact that a particular end user has uploaded a document to a particular location in a system is already connecting that document to the graph. The graph connects the document to other people, topics and entities connected with the person who uploaded the document.

Graphs consist of nodes (people, objects and topics) and edges (the relationships between the nodes).

The concept of the graph **(Graph 1)** has enormous potential in information architecture. You could narrow down the range of permitted values for any metadata field for any document any individual contributes to a system, just by ensuring that the system knows what role they occupy at the time they upload the document.

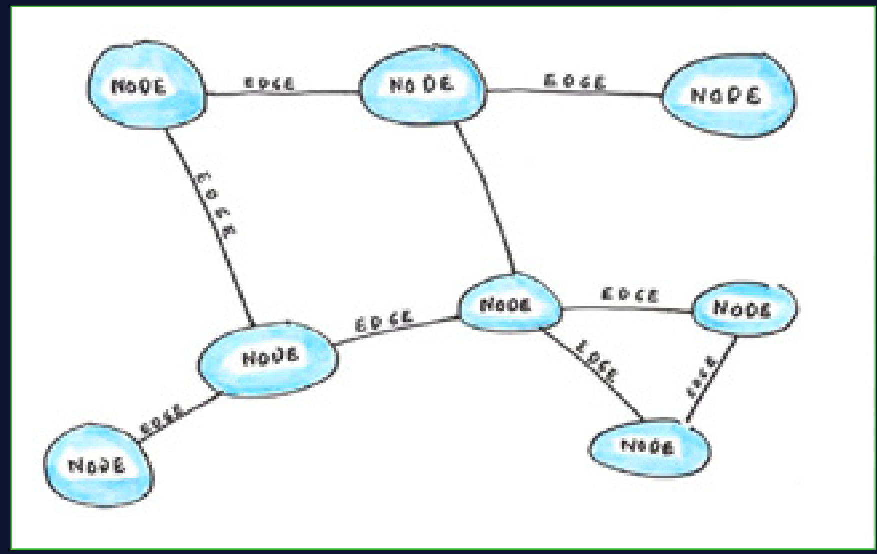
This pathway towards smart metadata also takes us away from the idea of the document management system as a standalone system (see **Graph 2**)

If we see a document management system as a world unto itself, we will never be able to capture accurate enough metadata to understand the documents in the system. Better to start with the idea that the documents which an individual creates are just one manifestation of their work, and are interrelated and interdependent with other manifestations of their work, such as their correspondence, their chats, and their contributions to various line of business databases.

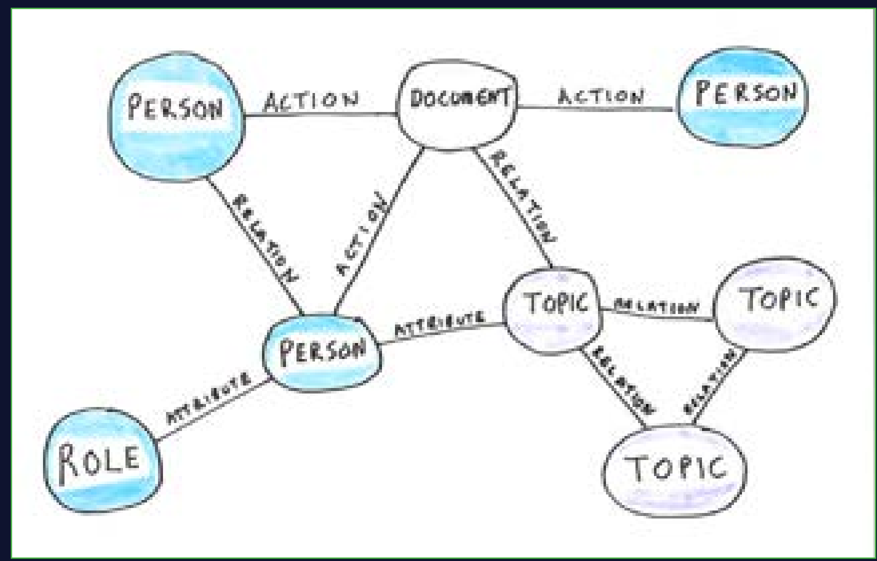
We can also distinguish between a knowledge graph, which is built out of what an organisation formally knows, and a social graph, which is built out of how people in an organisation behave in information systems.

The cloud providers have started by providing us with a social graph. Over time that social graph may improve to become more like a knowledge graph, and we will see below, when we look at Project Cortex, that Microsoft are taking some steps in that direction. But there is still some way to go before the enterprise social graph provided by Microsoft has the precision of an ideal knowledge graph. Note the word 'ideal' in that sentence: I have never worked in an organisation that has managed to get a knowledge graph (as opposed to a social graph) up and functioning.

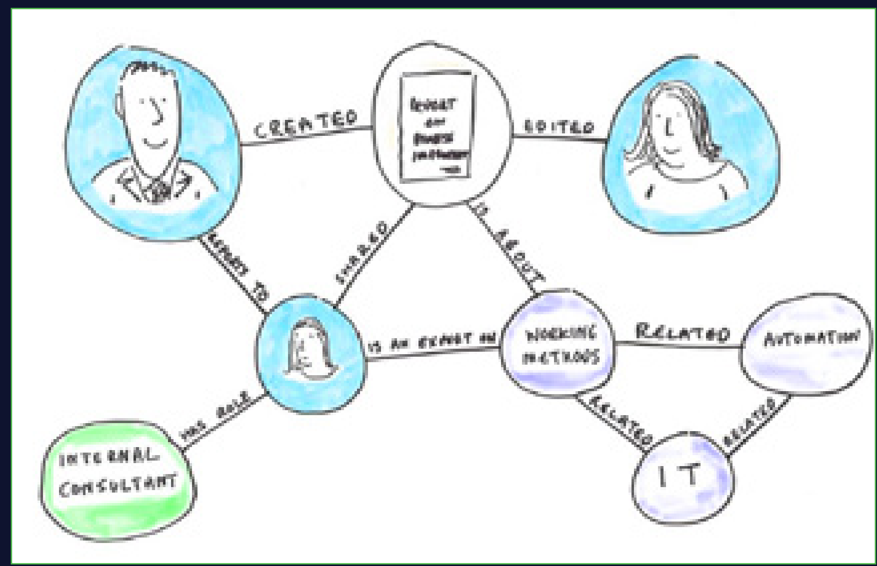
GRAPH 1



GRAPH 2



GRAPH 3



IF WE SEE A DOCUMENT MANAGEMENT SYSTEM AS A WORLD UNTO ITSELF, WE WILL NEVER BE ABLE TO CAPTURE ACCURATE ENOUGH METADATA TO UNDERSTAND THE DOCUMENTS IN THE SYSTEM.

The nature of an ideal knowledge graph **(Graph 3)** will vary from organisation to organisation. An engineering firm needs a different type of graph from a ministry of foreign affairs, which needs a different type of graph from a bank etc etc.

In an engineering firm, an ideal knowledge graph would connect:

- the people that are employed
- the projects that are being carried out by the company
- the systems that are being designed, manufactured, installed and maintained
- the structures that are being designed and built
- the engineering disciplines that are involved

These different datasets and vocabularies can be mapped to each other in a graph independently of any document. Once a graph is constructed, a document can be mapped to any one of these features and the range of possible values for all the other features should correspondingly reduce.

In a foreign ministry, an ideal knowledge graph would connect:

- the people that are employed
- the location that they are based in
- their generic role (desk officer, subject expert, ambassador etc)
- the country(ies) that they deal with
- the people they work closely with
- the multilateral fora that are participated in
- thematic topics
- types of agreements/treaties

Again, these can be mapped independently of any documents. Staff can be mapped to the countries they are based in/follow or to the thematic topic they work on.

The notion of the graph (whether a knowledge graph, a social graph or a blend of the two) brings home the fact that the data, document and messaging systems of an organisation are all interdependent. The graph becomes more powerful from a machine-learning and search point of view, if it is kept nourished with the events that take place in different systems. When a person e-mails a document to another person, this either reinforces or re-calibrates the graph's perception of who that person works with and what projects, topics or themes they are working on.

Information architects will still need to pay attention to the configuration of particular systems, and corporate document management systems bring with them more configuration choices than any other information system I can think of. They should, however, pay equal attention to the configuration of the enterprise social graph that the document management system, in common with the other systems of the organisation, will both contribute to and draw from.

See the next edition of the Bulletin for part two of this paper, which begins with a look at why both end users and Microsoft have tended to move away from user-added metadata in SharePoint.

ABOUT THE AUTHOR

James Lappin has been in records management for over a quarter of a century, as a practitioner, consultant, presenter, researcher, blogger and podcaster. He is working on a Loughborough University research project to evaluate archival policy towards e-mail and e-mail accounts. James presents the IRMS podcast and works as a European civil servant. James is the author of the long-running Thinking Records blog. @jameslappin

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8 Archiving and Sentencing 101 - Fundamentals
9 Digital Archiving, Preservation and Continuity
10 Understanding and Developing Information Management Governance
11 Data Management and Literacy 101 – The Fundamentals
12 Identifying and Developing EDRMS Business Requirements
13 Change Management for Information Management Projects
14 Project Management for Information Management Projects
15 Developing Online Records Management Training Tools
16 Information Security – 101
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Why a Little-Known Mathematical Formula is Driving Many AI Systems

BY KEITH DARLINGTON

When I first started working in AI about 35 years ago, I was intellectually dazzled with the application of one technique. It was called Bayesian inference –based upon a mathematical formula, called Bayes theorem, which was conceived by a British clergyman named Thomas Bayes in the 18th Century.

It was being used very successfully in expert systems –a successful branch of AI in the 1980s.

What struck me about this technique was the way that a mathematical formula could mimic –and improve upon in many cases –human experts in their decision-making processes.

As a graduate mathematician, I was familiar with and had used Bayes in other types of problem-solving. But its use in emulating human expertise was new to me. I found it impressive because human experts would be unlikely to have the knowledge of the mathematics underlying Bayesian inference.

Yet nowadays it is ubiquitous in the world of AI. It is being used to predict the spread of the Omicron pandemic, diagnose health problems, and help with various applications on our smartphones without us even realizing it. In machine learning systems today, Bayesian inference is more prominent than ever because, given the right conditions, it can mimic the way that human decision-making involving uncertainty exceptionally well. How could that be? The reason is that experts subconsciously learn to assign reasonably good weightings to evidence that enable them to do intuitive calculations in problem-solving. But Bayesian inference can do such calculations –very precisely.

IN MACHINE LEARNING SYSTEMS TODAY, BAYESIAN INFERENCE IS MORE PROMINENT THAN EVER BECAUSE, GIVEN THE RIGHT CONDITIONS, IT CAN MIMIC THE WAY THAT HUMAN DECISION-MAKING INVOLVING UNCERTAINTY EXCEPTIONALLY WELL.

BAYES THEOREM –HOW IT WORKS

To understand how it works, it is necessary to use symbolic notation to describe the problem. First, the problem should be formulated in terms of one, or more hypotheses. A hypothesis is simply a proposition whose truth is unknown. For example, a hypothesis could represent a patient being infected with the Omicron virus. If a person is selected at random then the answer to this question would be unknown. But experts would have an initial idea of how likely that is to be. This is called the prior probability and it is a measure of the likelihood of an event happening without any further information being known. A probability represents the chance of an event happening as a numerical value between 0 and 1. A probability value of 0 would mean that an event is impossible, whilst a value 1 (one) would mean an event is certain to happen.

A good estimate of a prior probability can be obtained from an expert or from estimating its value from statistical averages. In the case of Omicron, we could examine the number of infections compared to the number in the population. We write P(H) to represent the prior probability of H.The next step is to use evidence that will be used to update our prior probability of H. Evidence is abbreviated by the symbol E and the probability of this evidence occurring is written as P(E). Bayes realized that by combining the prior probability of a hypothesis and using the evidence from current observations, he could calculate an updated probability reflecting the current situation – known as a posterior probability. Once we have the prior probability for a hypothesis, we then need to describe how much the knowledge of an item of evidence would change the probability of a hypothesis.

We write P(E/H) as meaning the probability of the evidence E being true if the hypothesis H is true. This is saying that the probability of E is conditional on H. In essence, Bayes conceived a formula for updating the probability of a hypothesis when new evidence is received. If the new evidence is consistent with the hypothesis, then the probability of the hypothesis increases, otherwise, it could decrease. The higher the probability, the greater is the chance of the hypothesis being true.

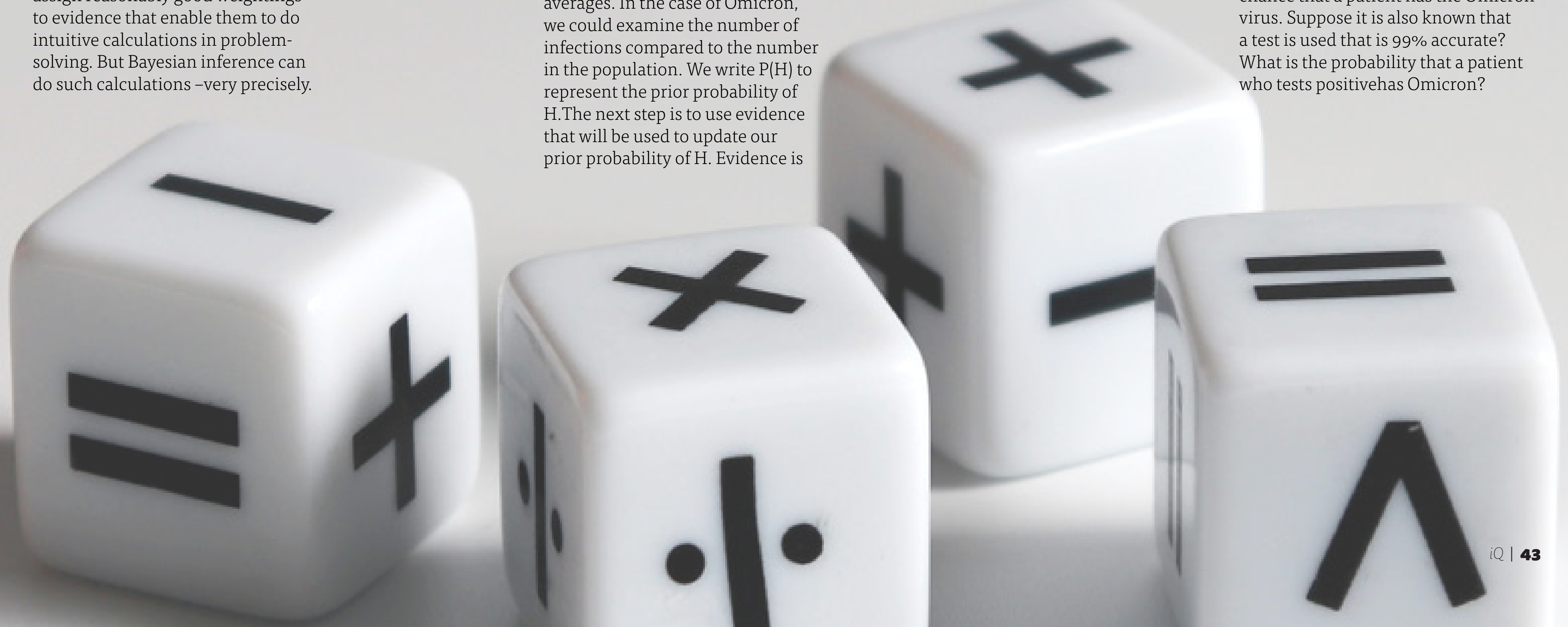
The Bayes formula, written in mathematical notation, is

$P(H|E) = (P(E|H) \times P(H))/P(E)$.

This formula says that to find the probability of a hypothesis happening in the light of evidence, we would get values for the right-hand side, and insert them into the formula, from which an updated value of P(H/E) could be found. In other words, an updated value of the chance of the hypothesis happening given that we have observed the evidence E. Of course, in practice, all the number crunching is done by computer. However, an example is shown below to illustrate how Bayesian inference could be used to update predictions for Omicron infections based upon the outcome of a Omicron test. This is a simplification and is not based on real data. Its purpose is to show how mathematics is used in the formula to update probabilities.

EXAMPLE

Suppose it is known in a certain hospital that there is a 1 in a 1000 chance that a patient has the Omicron virus. Suppose it is also known that a test is used that is 99% accurate? What is the probability that a patient who tests positivehas Omicron?



To find the solution, we need to find values for each part of the right-hand side. i.e., $P(H)$, $P(E/H)$, and $P(E)$.

$P(H) = 1/1000 = 0.001$ (Since there is a 1% chance of having Omicron unconditionally)

$P(E/H) = 0.99$ this is given since 99% of the time Omicron patients will test positive.

Now $P(E) = P(E/H) \times P(H) + P(E/{\sim}H) \times P({\sim}H)$, where ~H means not having Omicron.

So, $P({\sim}H) = 99/100 = 0.999$. And $P(E/{\sim}H) = 0.01$

Hence, inserting these calculated values in the Bayes formula gives:

$P(H/E) = 0.99 \times 0.001/(0.001 \times 0.99 + 0.999 \times 0.01) = 0.09$.

This means that the patient would have a 9% chance of having Omicron given that he or she tested positive. This may come as a surprise to some people but remember there is a 1/1000 chance of having Omicron, so in a sample of 1000, we would expect one to have it. Of the remaining 999 people who do not have it, the test will fail about once in a hundred and that means we would expect about ten of them to fail/ We are left with 1 with about 10 without giving a probability of about 1 in 10 –which is very close to the Bayes formula result of 0. 09.

BAYESIAN INFERENCE IS A PROBABILITY UPDATING PROCESS AND EACH NEW PIECE OF EVIDENCE CAN CORROBORATE OR REFUTE THE LIKELIHOOD OF GUILT.

It should also be noted that for Bayesian inference to work, the evidence used to update hypotheses must be independent of each other.

BAYESIAN CONTROVERSY

The use of Bayesian inference has sometimes caused controversy – particularly its use in forensic science. For example, a man was convicted of rape in the UK in 1990 and incarcerated for 16 years –partly on the basis of DNA evidence. An expert witness forthe prosecution said that the chance that the DNA could be the same as another person was just one in three million.

But the man appealed against this sentence. An expert claimed that there was a flaw in the reasoning because this evidence was mixing up two questions: first, how likely would it be that a person's DNA matched the DNA in the sample, given that they were innocent; and second, how likely would they be to be innocent, if their DNA matched that of the sample? Although there was only a 1 in 3 million chance of matching the DNA, the total population was assumed to be about sixty million. This means that twenty people would be expected to have a matching DNA and one of those would be guilty. Hence, if one is selected at random, then there is a 19 in 20 chance that an innocent person is selected. This is a 95% chance. It does seem to be very high and has become known as the "prosecutor's fallacy".

However, DNA evidence alone would not be enough to secure a conviction because, in practice, other evidence would reduce this probability. For example, if it were known that no other person of the twenty could have been in that area at the same time as the victim was raped then applying that evidence to Bayes would increase the likelihood of the accused being guilty. Bayesian inference is a probability updating process and each new piece of evidence can corroborate or refute the likelihood of guilt.

NAIVE BAYESIAN LEARNING SYSTEMS

One of the problems with Bayesian inference is that, for large systems, there are large amounts of hypotheses and evidence there could lead to a combinatorics explosion in the number of interconnected hypotheses and evidence. This would require a great deal of human hand coding that could be avoided by applying machine learning to data that if available. A so-called naive Bayesian learning system does that. It is an approach that draws upon learning from experience, combined with the application of Bayes Theorem. Naive Bayes works quite well –even when the independence condition is violated –hence its name. Naive Bayesian learning models are being used behind the scenes in many applications that all of us use daily on our Smartphones. For example, naive Bayesian learning is being used in Spam filtering on email systems extensively and energy management systems on smartphones.

CONCLUSIONS

Bayesian inference has become a successful AI technique both as a computational system and as one derived from a learning model. It is also well suited to a wide range of application domains if certain conditions prevail. Bayesian inference is likely to be used extensively in many AI systems developed in the future.

ABOUT THE AUTHOR

I am a recently retired university lecturer in Artificial Intelligence (AI) living in Wales. My PhD was in AI specialising in explanation facilities for intelligent systems. I graduated in pure mathematics and also taught mathematics and computing during my career. I have written several books in computing and expert systems, and presented several conference and journal papers in AI related topics. My current interests include machine learning, robotics, and common sense reasoning.

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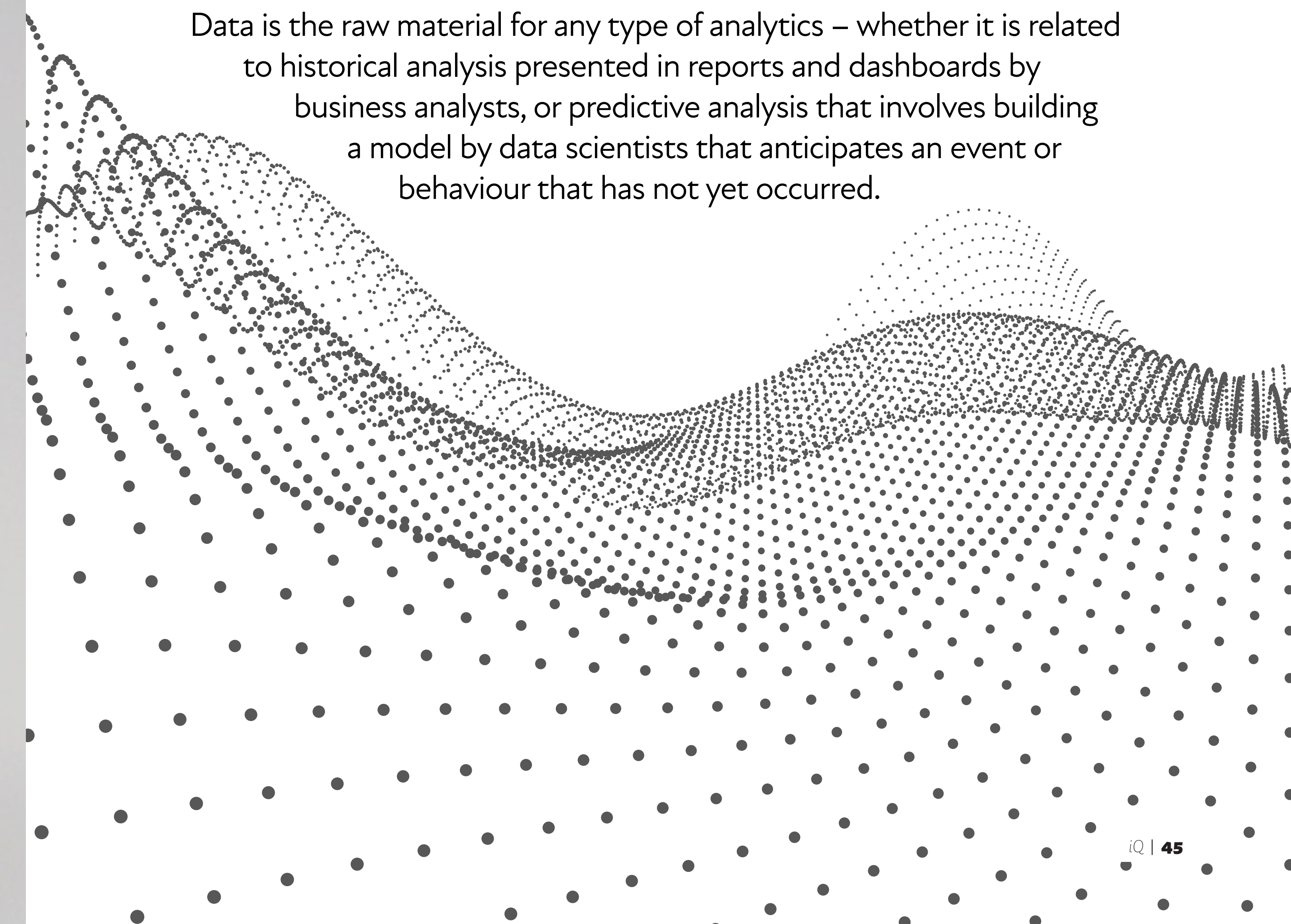
Data Access Governance Requirements for Data Science

BY SYED MAHMOOD

Data is the raw material for any type of analytics – whether it is related to historical analysis presented in reports and dashboards by business analysts, or predictive analysis that involves building a model by data scientists that anticipates an event or behaviour that has not yet occurred.



Before business analysts or data scientists can do anything with data, they essentially go through the same set of steps to make data useful for analysis.

The set of operations to convert raw data into a format that is easy to understand and hence useful for further analysis is collectively known as data preparation or pre-processing. Generally speaking, this involves:

- Finding relevant and available data
- Arranging or labelling data into categories such as numerical, categorical, text, audio, video, etc.
- Improving data consistency by coming up with an approach to deal with misspelled categories, null values, and or missing values
- Applying data balancing methods if the data contains an unequal number of observations

When data is ready for consumption, business analysts can create reports, dashboards and visualizations to paint a picture of the overall health of the business. Also, data scientists can now build and train statistical models using techniques such as linear regression, logistic regression, clustering, and time series. In turn, the output of these models can be used to automate decision making using sophisticated techniques such as machine learning.

At its core, data analytics is an exploratory exercise where data consumers (business analysts and data scientists) analyse large bodies of data to reveal patterns, behaviours or insights to inform some decision-making process. In the case of machine learning, it specifically attempts to understand the features with the biggest influence on your target variable.This requires access to a large amount of data that may contain sensitive elements such as customer information (e.g., age, social security number, address, etc.). In many instances, this data is owned by different business units and is subjected to strict data sharing agreements.

This presents data infrastructure teams with unique challenges. For example, they need to provide data consumers with access to enterprise data at the required granularity while complying with privacy regulations in addition to the requirements set by the data owners. Another major challenge for the data infrastructure team is to support the rapid demand of data by the data science team for their analytics and innovation projects.

Data science requires not only simply reading data, but also updating data as mentioned in the pre-processing steps. In other words, data science by nature is a read and write-intensive activity. Data infrastructure teams usually create sandbox instances for these data consumers whenever they start a new project. However, these sandbox instances also require robust data access governance to not expose any sensitive or confidential data during data exploration.

To support the growing data science activities in a company, data infrastructure teams need to implement a unified data access governance platform that has four important attributes.

First is the ability to encrypt data when it is being extracted from source systems, on its way to the sandbox instance, and at rest. This also includes the ability to mask a column that contains sensitive elements so that data consumers still have access to data like social security numbers for analysis. Meanwhile, data infrastructure teams can redact or partially mask data at the individual customer level to protect customer privacy.

AT ITS CORE, DATA ANALYTICS IS AN EXPLORATORY EXERCISE WHERE DATA CONSUMERS ANALYSE LARGE BODIES OF DATA TO REVEAL PATTERNS, BEHAVIOURS OR INSIGHTS TO INFORM SOME DECISION-MAKING PROCESS.

Secondly, the data access governance platform must have the ability to natively enforce read as well as write access control for on-prem and cloud services. For example, a business analyst might need to insert a column in a table to reflect the change in sales territories. To perform this operation, the analyst needs permission from the administrator to both read data from the table as well as write new data into it. Read and write operations are critical for data science, yet some of the data access control products can enforce read-only access policies. (See diagram).

Thirdly, the data access governance platform you select must provide the functionality to identify, classify and tag sensitive elements in your data. A platform that offers this capability through a combination of mechanisms such as data dictionaries, pattern matching, and models is generally more effective in detecting sensitive elements in your data.

BUSINESS ANALYSTS AND DATA SCIENTISTS CONSTITUTE A SUBSTANTIAL AND GROWING PORTION OF THE DATA CONSUMER COMMUNITY IN ANY COMPANY.

Finally, the data access governance platform must offer visibility to IT administrators into the analytics process. This requires the platform to have real-time capabilities that inform administrators about who requested access to what data and whether access is granted or denied, and which policy was in effect to grant access to data. The ability of the data access governance platform to log the status of every access request is critical to complying with privacy and industry regulations as part of internal and external audits.

Business analysts and data scientists constitute a substantial and growing portion of the data consumer community in any company. This community is unique in the sense that it needs to not only find answers to its questions by querying data in various repositories but also transform it to build sophisticated analysis and models. Therefore, read and write operations are at the heart of the data science process. Data infrastructure teams that are tasked with democratizing data while complying with privacy and industry regulations must select a data governance platform that can accelerate the data sharing process in the organization by satisfying the unique requirements of the data consumers.

ABOUT THE AUTHOR
Syed Mahmood leads product marketing at Privacera, bringing over 15 years of enterprise software product marketing experience. Prior to Privacera, Syed led product marketing for data science, security, and governance at Hortonworks, where he launched a next-generation hybrid platform. Prior to Hortonworks, he led product marketing for Tibco's data visualization solution and has held numerous product management and marketing roles at various organizations including Oracle and Fair Isaac. Article Sourced from https://tdan.com/data-access-governance-requirements-for-data-science/28664

Get Your Information Governance Act Together in 2022

LAURENCE HART

As organizations prepare for the year ahead, it's important to first review the information and content challenges from 2021. Well-known pandemic related issues aside, many of the challenges organizations faced centred around managing content from their new, or newly utilized, collaboration platforms.

Common concerns included:

- How do we manage content shared in Microsoft Teams?
- What rules should we place around Zoom recordings?
- How broadly should we allow access to this content?
- Where did David keep the vendor proposals?

EXTERNAL FACTORS WILL CONTINUE TO PUSH ORGANIZATIONS TO ADAPT YET AGAIN. 2022 IS THE YEAR TO ENSURE YOUR ORGANIZATION HAS A STRONG INFORMATION GOVERNANCE PROGRAM TO HELP RESPOND TO THESE, AND FUTURE DECISIONS.

Organizations have wrestled with these, and similar, questions more frequently over the last two years. In some cases, they found the answers easily because they had a strong information governance (InfoGov) program in place that provided the answers.

These kinds of changes aren't going anywhere. External factors will continue to push organizations to adapt yet again. 2022 is the year to ensure your organization has a strong information governance program to help respond to these, and future, decisions.

CHICKEN OR EGG: INFOGOV GUIDING PRINCIPLES OR LEADERSHIP STRUCTURE?

InfoGov professionals debate whether you should first have guiding principles or a leadership structure. This is a chicken and egg debate — it all depends on your perspective. However, having the leadership team identified and in place first allows the team to own and understand the information governance principles for the organization.

As the InfoGov program grows and evolves from conception to execution, that leadership will need to guide the program to keep it on a steady course.

This is critical as while organizations agree they need information governance, they end up deferring implementation in favour of immediate operational needs. Having the established authority to reinforce InfoGov requirements helps keep the goals and importance of information governance in the forefront.

INFOGOV PRINCIPLES ESTABLISH CONSISTENCY

Any InfoGov professional will gladly explain why information governance is important. The reason information governance is important for your organization will vary. In fact, the balance of issues often differs based on the types of content within an organization. Having guiding principles helps frame the key questions of:

- What regulations does the organization need to comply with?
- Is there historical value to the information?
- What are the risks that need to be managed?
- How long does the business need to use the information?

That last question is tricky. Business operation groups always exaggerate their needs. They'll always have an example of when having a piece of very old content helped them solve a problem. Your task is to strike a balance between their needs and other drivers.

Risks, regulations and business needs typically fade over time while historical value grows. Does that historical value or business need outweigh the risk of keeping the content? Guiding principles help organizations answer that question.

KEEP PEOPLE IN THE LOOP ON INFOGOV POLICIES AND CHANGES

Information governance plans often forget to create a common understanding throughout the organization of why different policies exist. Where pockets of understanding exist, it's often focused on their part of the business. Don't hammer people with every detail at once. Share the big picture in the proper context.

Another challenge related to employees is how policies affect the way information is managed. Once rules and controls are applied to information, it may result in that information moving to other systems. Changes like this often occur without considering the impact on how people work.

People need two things: They need to know the "why" behind the changes. And more importantly, they need to be able to find information quickly. The inability to find information is when the protests really start.

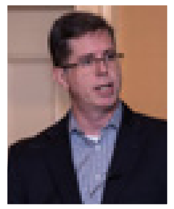
GET A CLEAN START

Building a strong information governance program isn't easy. If it was, every organization would have one already. Organizations address the more immediate operational needs first. The catch is that by investing now in a strong information governance foundation, you'll spend less time completing revenue generating projects as most information requirements are understood from the beginning.

BY INVESTING NOW IN A STRONG INFORMATION GOVERNANCE FOUNDATION, YOU'LL SPEND LESS TIME COMPLETING REVENUE GENERATING PROJECTS AS MOST INFORMATION REQUIREMENTS ARE UNDERSTOOD FROM THE BEGINNING.

Look back on the past year. Find the emails where debates raged for weeks about information requirements. Dig out that list of outstanding questions from an ongoing development effort. Use those to demonstrate how having an information governance program in place to manage the information can improve operations in the long-term.

Start your new year right. Which would you rather be when new information challenges arise: proactive or reactive?



ABOUT THE AUTHOR

Laurence Hart is a director of consulting services at CGI Federal, with a focus on leading digital transformation efforts that drive his clients' success. A proven leader in content management and information governance, Laurence has over two decades of experience solving the challenges organizations face as they implement and deploy information solutions. Article sourced from: This Is the Year to Get Your Information Governance Act Together (cmswire.com)

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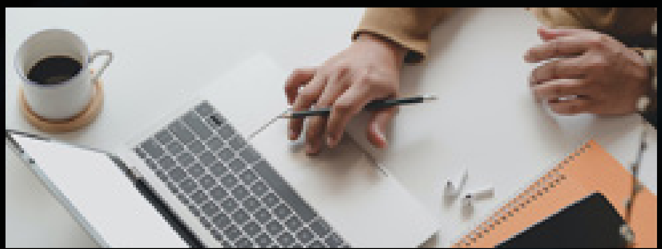

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INTERVIEW WITH Linda Shave FRIM

Linda is a futurist who has a fascination on how evolving technologies can be used in innovated ways. Linda is a researcher, presenter, advisor, and author. Her innovation, knowledge and expertise have been nationally and internationally recognised. Amongst her numerous industry awards is the prestigious gold medal laureate for government innovation issued in Washington DC. Linda is an advocate for the R/IM profession as well as being a School Governor, STEM Ambassador and Quantum Ambassador. Linda is an educator who believes in lifelong learning, reskilling, and upskilling the workforce for the jobs of today and tomorrow.

1. What brought you to the records, information management industry? Tell us briefly about your career...

I became interested in the records and information management industry when I worked for the Army Aviation and then Qantas Airways. Keeping NOTAMs, troop movement, aircraft maintenance, engineering, licensing, flight plans, catering, cargo, training, passenger, and staff records were some of the vital records required in running the Army Aviation and in managing an airline. I joined AIIM/IIM which also had an affiliated membership with RMAA (now RIMPA) in or around June 1988.

2. Throughout your career what has been your proudest achievement or milestone?

Receiving the Gold Medal Laureate for Government Innovation in Washington DC was one of my proudest achievements. I have also been honoured to have received the RIMPA J. Eddis Linton Award in the category of Information Proficiency Outstanding Individual and most recently being awarded the advancement to Fellow Status in acknowledgment of my high level of knowledge and contribution to the R/IM profession. Other milestones have included receiving the Qantas Customer Excellence Award.

3. Who has had a significant influence on your career?

There have been many influencers in my career and thirst for knowledge. These have included pioneers and practitioners such as Frank McKenna, Brand Hoff, Mike Quinn, Professor Michael Rosemann, Professor Sue McKemmish, Barbara Reed, Mike Kirkby, Geoff Moore, Robert Goode, Anne Cornish, and Julie Apps to name a few.

4. What do you love best about being a part of RIMPA?

I love being part of a professional association and sharing my passion, knowledge, skills and experiences.

I am an advocate and champion for the R/IM profession and the industry. I have regularly contributed to the RIMPA iQ magazine since 2012, produced eBooks, training materials and presented at conferences on a wide range of diverse topics.

5. What career advice would you give to young professionals starting out in the industry?

Anyone embarking on a R/IM career should be prepared for a career that requires lifelong learning as the R/IM industry is constantly changing to meet new and evolving challenges such as changing business models and technology drivers. Drivers such as Edge AI, big data, business digital transformation and data science. Data science uses scientific methods, algorithms, artificial intelligence, machine learning, robotic process automation to extract knowledge and insights from structured and unstructured data.

6. Where do you see the profession heading in the next decade?

With the rise of Quantum computing in the next decade, I foresee the R/IM profession heading towards new digital, qubit hybrid and information processing models. This along with the adoption of autonomous databases which leverage artificial intelligence and machine learning to provide full, end-to-end automation and data archaeology which refers to the art and science of recovering computer data encoded and/or encrypted in obsolete media or formats will see a new embryonic profession grow.

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At FYB our customer promise is to provide secure, easy to use, leading edge technological solutions, to enable organisations to harness the power of their information so they can provide excellent services to the community. We've stayed true to our core beliefs—to deliver the best information governance, systems and solutions to our customers.
Contact: Daniel Dawson
Ph: 1800 392 392
E: info@fyb.com.au
W: fyb.com.au

GRACE INFORMATION MANAGEMENT
Grace Information Management offers an accredited, secure and trusted records and information management service that is constantly evolving to meet the ever-changing needs of information management professionals. Our range of services are provided nationwide and encompasses the secure storage, transportation, digitisation and confidential destruction of your valuable information with strict compliance to Australian Standards.
Contact: Emily McLeod
Ph: 02 9838 5711
E: emcleod@grace.com.au
W: grace.com.au

iCOGNITION
iCognition are leading Information Management and Governance (IMG) specialist with over 18 years of customer success stories in delivering IMG solutions and services to over 130 government and private sector enterprises across Australia and overseas. With information governance at our core, iCognition empowers customers to transition to the cloud with our EDRMSaaS.cloud as well as enabling customers to meet the challenges of managing information within Microsoft365 through our integration and Compliance Authority engine for Micro Focus Content Manager. iCognition is an Australian SME established in 2003 with offices in Canberra, Sydney, and Brisbane.
Contact: Nicholas Fripp
Ph: 0434 364 517
E: Nicholas.Fripp@icognition.com.au
W: icognition.com.au

IGNITE CO
Ignite is a talent powerhouse comprised of three key divisions: Specialist Recruitment (contract, temporary and permanent recruitment services), On Demand (managed IT services) and Talent Solutions (RPO, volume recruitment, talent consulting & training). Over the past four decades, we have worked with public and private organisations of all sizes and built a reputation as Australia's trusted talent advisor. Mezzanine Level, 3 Spring Street, Sydney NSW 2000
Ph: 02 9250 8000
W: igniteco.com

INFORMATION PROFICIENCY
Information Proficiency is a Records & Information Management specialist providing a full range of services and software. We cover everything IM; from strategy to daily operational processing practitioners, full managed services, technical support & help desk, training, software development, data migrations, system design and implementations.
We work with many IM products including e-signature, workflow, MS365, scanning, reporting and analytics. We also develop a range of productivity tools and connectors. Our team are experienced practitioners who can assist with anything information management
We work hard to understand your requirements and implement solutions to match. Services available in all States & Territories.
Contact: Tammy McCallum
Ph: 08 6230 2213
E: info@infoproficiency.com.au
W: infoproficiency.com.au

IPLATINUM
iFerret is a turnkey enterprise search solution developed by iPLATINUM that works like "google" over your corporate data. iFerret enables you to find information quickly across your enterprise.
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Elizabeth Street Surry Hills,
NSW, 2010
Ph: 02 8986 9454
Mb: 0405 102 500
Fx: 02 9281 2150
E: info@iplatinum.com.au
W: iplatinum.com.au

IRON MOUNTAIN
Iron Mountain Incorporated (NYSE: IRM), founded in 1951, is the global leader for storage and information management services. Trusted by more than 225,000 organisations around the world, and with a real estate network of more than 85 million square feet across more than 1,400 facilities in over 50 countries, Iron Mountain stores and protects billions of valued assets, including critical business information, highly sensitive data, and cultural and historical artefacts.
Level 2 170-180 Bourke Road
Alexandria NSW 2015
Contact: Anita Pete
Ph: 02 9582 0122
onmountain.com

LEADERSHIP THROUGH DATA
Leadership Through Data provide Microsoft 365 focused information and records management training that has been developed by information and records managers to Australian and New Zealand Records Standards. Our core offerings are designed to help Information and Records Managers make sense of Microsoft 365 so that strategy and policy can be developed with a true and accurate understanding of the platform's capability. Our SharePoint Foundation offering helps with understanding the core of M365 before providing education in specific aspects - Records Management, Information Protection and Privacy Management, and Information Architecture.
Contact: Jacqueline Stockwell,
Managing Director & Founder |
E: jacqueline@leadershipthroughdata.co.uk
W: leadershipthroughdata.co.uk

MICRO FOCUS
At Micro Focus we help you run your business and transform it. Our software provides the critical tools you need to build, operate, secure, and analyze your enterprise. By design, these tools bridge the gap between existing and emerging technologies—which means you can innovate faster, with less risk, in the race to digital transformation.
Level 8, 76 Berry St,
North Sydney NSW 2060
Contact: Aylin Dinscoy
Ph: 0416 223 226
E: dincsoy@microfocus.com

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Contact: Cameron Thornton, Solution Director - Information Governance, Objective Corporation.
Contact: Melody Morgan
Ph: 02 9955 2288
E: Melody.Morgan@objective.com
E: Cameron.Thornton@objective.com
W: objective.com

RECORD POINT
RecordPoint Records 365 is a federated data management platform, enabling information governance policy to be automatically applied to manage risk and pioneer of cloud-based recordkeeping. RecordPoint is leading the way in the content services segment and providing organizations with the ability to truly manage records from across multiple services and platform using a single, federated solution. Our mission is to make sure your information is always safe and under control, wherever it exists. With support for Office 365, SharePoint, File Shares, E-mail, Box, Dropbox, G-Suite and more, RecordPoint is demonstrating how easy federated compliance can be with a modern, trusted cloud solution.
Suite 401, Level 4, 151 Castlereagh Street, Sydney, New South Wales 2000
E: denis.hawkins@recordpoint.com
W: recordpoint.com

RECORD SOLUTIONS
Records Solutions is an Australian-owned company, founded in 1994. Created BY Information Managers FOR Information Managers, our team of highly skilled staff provide records and information management solutions and services to public and private business sectors. As a software neutral vendor, our only concern when working with you is what is best for you. Delivering services in accordance with a Quality Management System that has been developed in line with AS/NZS ISO 9001:2016, our aim is to assist our clients in achieving the best possible outcome, while meeting AS ISO 15489 and any other organisational, legislative, and quality requirements.
Contact: Keith Davis, Director/Principal Consultant.
Ph: 1300 253 060
E: admin@rs.net.au
W: rs.net.au

STEAMATIC
Steamatic is the home of data and document recovery in Australia. For some time now, Steamatic's unique technologies have meant that invaluable data can be saved and returned to pre-loss condition when disaster strikes. Data, information and even works of art can be saved from a wide range of mediums and formats including: books, computer print-outs, maps and technical drawings, loose sheet documents and files, hand written documents and artifacts, photographs and photographic film, motion picture film, works of art and cultural artifacts, x-rays, microfiche, magnetic tapes, optical media, computer hardware, photocopies.
Contact: Mr Wayne Spence
Ph: 0413 853 981
E: wspence@steamatic.com.au

TIMG - THE INFORMATION MANAGEMENT GROUP
TIMG has been in the Information Management business for more than 20 years. We are known as a company that solves Information Management problems and we remain committed to providing innovative, smart and cost-effective information management solutions for our clients. As the digital world rapidly evolves, we remain committed to helping clients accurately store, track, access, retrieve and under control data.
Some of the services we offer include Document Conversion and Digitisation; eDiscovery solutions for the legal industry; Litigation Support; Document Management Software; Aperture Card Conversion; Online Backup and Cloud solutions; Mailroom and Mail handling services; Scanner Sales and Rental.
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Contact: Carl Duncan
Ph: 0421 807 762
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W: wyldlynx.com.au

ZIRCODATA
ZircoDATA is a market leader in Records and Information Management (RIM), providing secure document storage and records lifecycle management from information governance and digital conversion through to storage, translation services and destruction since 1995. With world class Record Centres across Australia, our trusted team of industry experts support over 3,000 customers. We deliver superior service and solutions that reduce risk and inefficiencies, securely protecting and managing our customers' records and information 24 hours a day, every day of the year.
Level 4, 973 Nepean Hwy,
Bentleigh Victoria 3204
E: services@zircodata.com.au
W: zircodata.com.au

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Leadership and experience form the backbone of RIMPA's board.

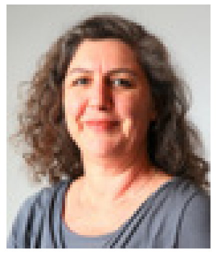
RIMPA's Board of Directors brings decades of industry insight and a wealth of experience, who formally represent the organisation. The Board of Directors consists of one elected member from each Branch with a Chair elected from the Board of Directors, as well as three independent directors.

Thomas Kaufhold
B Admin, Life MRIM
Chair and Australian Capital Territory (ACT) Director

Peta Sweeney BA(LIS) BED MBA FRIM
Vice Chair and Queensland (Qld) Director

John Sim MRIM
Victoria and Tasmania (Vic/Tas) Director

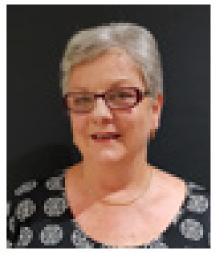
Rebbell Barnes MRIM
New South Wales (NSW) Director



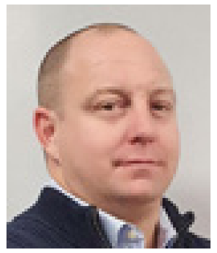
Bonita Kennedy ARIM
South Australia and Northern Territory (SA/NT) Director

Carolyn Atkinson ARIM
Western Australia (WA) Director

Peter Williams
Independent Director



Julie Apps, Life ARIM
Independent Director



Jeremy Manford
Independent Director

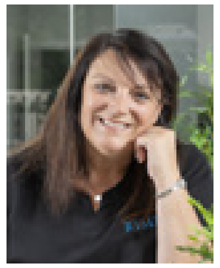
RIMPA HEAD OFFICE

MEET THE TEAM BEHIND THE SCENES

RIMPA

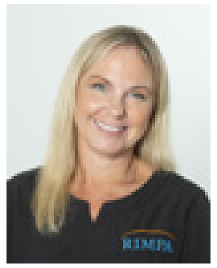
1/43 Township Drive,
Burleigh Heads Qld 4220

www.rimpa.com.au

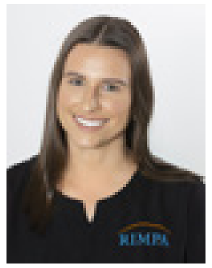


Anne Cornish MRIM
Chief Executive Officer
M: 0419 366 109

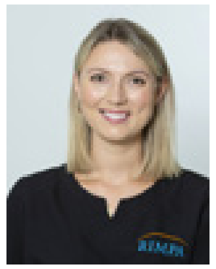
Jo Kane B Bus (Tsm)
Grad DipTeach (Sec)
Cert IV (WIT)
PR and Marketing Manager



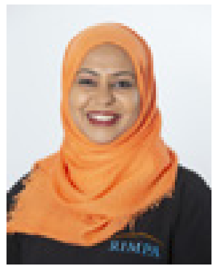
Tynelle Spinner Dip. (Lib&InfoServ)
Member Services Coordinator
M: 0437 464 302



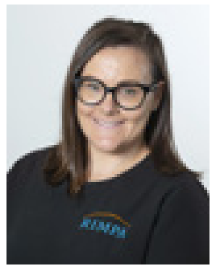
Amie Brown
(B Mass Comm)
PR and Marketing Coordinator



Carly Pagotto
Events and Operations Coordinator



Munaa Said
Principal Trainer and Assessor



Erin Cserpak
Bookkeeper

Owl Member
(Master of Information Management)
Guardian of Information Officer

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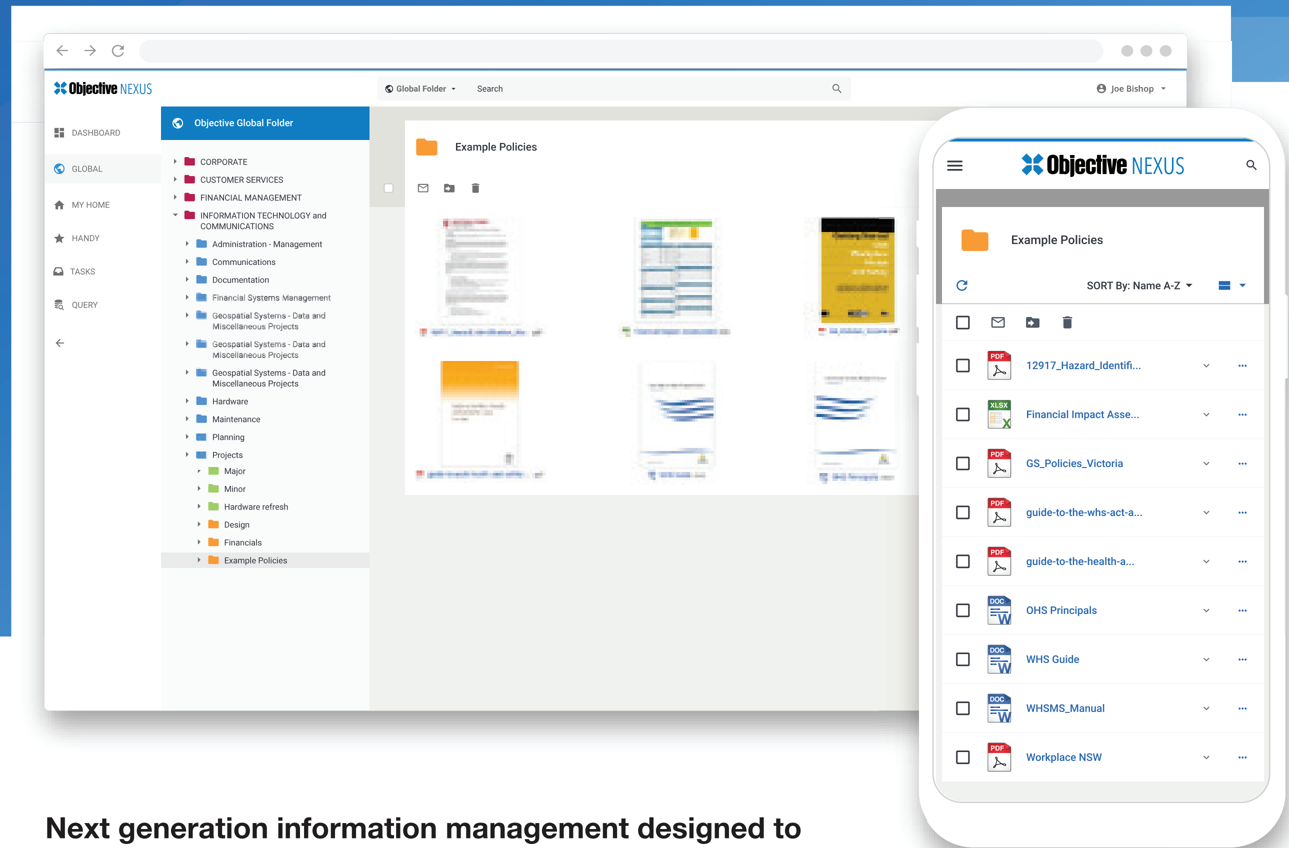

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