

# Easy & Flexible

ways of working  
& collaborating

# Confidence & Control

We have all the right  
information at our  
fingertips

## AI & AUTOCLASSIFICATION

The answer to your document  
management needs?



INFORMATION  
LEADERSHIP

let's make  
work better

# Let's make work better

## Resource Centre

Home > Resource Centre

Welcome Grant Margison



**Knowledge Articles, & Whitepapers**

Get expert views & the latest thinking



**Case Studies**

...on what customers are achieving



**Webinars**

...on IM/KM and digital workplace thought leadership



**iBrief E-Newsletters**

Read the back issues of our regular newsletter

THANKS FOR LOGGING IN - AS AN APPROVED USER  
YOU NOW HAVE UNLIMITED ACCESS TO ALL OUR RESOURCES...  
HERE'S OUR TOP PICKS...

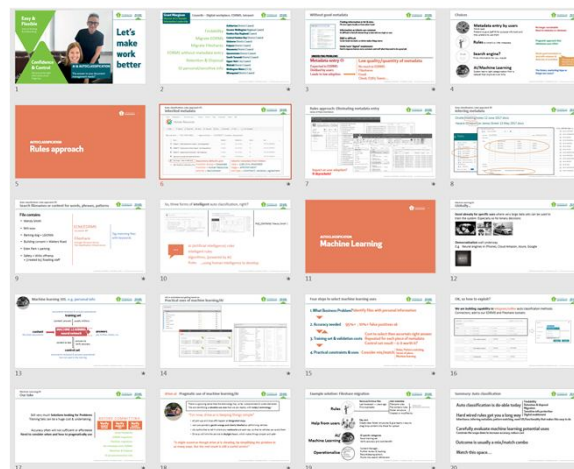
**ON-DEMAND Webinars brought to you in association with Microsoft New Zealand:**

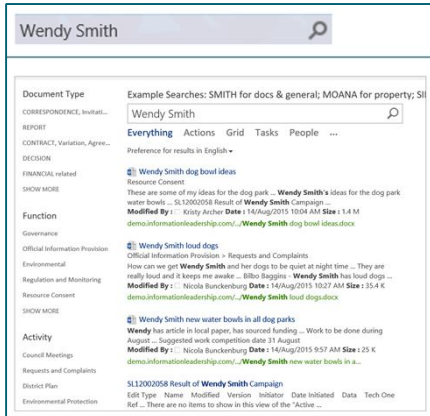
- [iWorkplace 365 webinar #1: Full document management without metadata entry by users](#)  
A game changer for user adoption using the Smart Metadata add-in to SharePoint
- [iWorkplace365 webinar #2: Managing & Publishing Critical Documents](#)  
Policies, Procedures, Personnel files, Case files, Contracts etc using the Smart Case Files add-in to SharePoint
- [iWorkplace365 webinar #3: Managing Document Templates](#)  
and forms to drive consistency using the Template Central add-in to SharePoint
- [iWorkplace 365 webinar #4: Meeting PRA compliance commitments](#)  
Using our proven Smart Records add-in to SharePoint
- [iWorkplace 365 roadshow: Moving to O365 cloud and the future of document management](#)  
Keynote event (90mins) on O365 and SharePoint as your digital workplace - your in-depth look at the future

**Other digital workplace implementation resources**

- Avoid common gotchas: Your [SharePoint Online implementation checklist](#)
- The Public Records Act [new Executive Sponsor role](#) that all organisations need. Includes a summary of what is needed and proven tactics to make progress.
- [One Drive for Business](#) - Making One Drive for Business the game changer it should be for your digital workplace.

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for your login to our resources area





Finding information is hit & miss  
I'll store copies locally so I have what I need

Information accidents are common  
Its difficult to find all relevant & up to date info on a topic or case

R&D is difficult  
So we retain too much, so clutter makes things worse

Holds back "digital" enablement  
Hard to improve how we serve customers and staff what they need to do a great job

## UNDERLYING PROBLEMS

Metadata entry 😞

Expected in EDRMS

Disliked by users

Leads to low adoption



Low quality/quantity of metadata

No much in EDRMS

Fileshares

Email

Cloud, O365 Teams...



## Metadata entry by users

Worst case:

Pretend to give staff fit for purpose info tools and they pretend to use them



**Rules** to inherit or infer metadata



## Search engine?

Finds information for you, maybe



## AI/Machine Learning

System learns right categorisation from a dataset that improves over time

No longer sustainable  
Need to minimise or eliminate

Pragmatic approach that eliminates user effort

Needs good metadata to deal with volumes & diversity of activities

The system files documents & we can't find them...

The future, marketing hype or fringe use cases?

1. What Business Problem? Identify files with personal information



2. Accuracy needed 95%+ ; 10%+ false positives ok



3. Training set & validation costs  
Cost to select then ascertain right answer  
Repeated for each piece of metadata  
Control set result – is it worth it?



4. Practical constraints & uses Consider mix/match

Rules, Pattern matching
Sense of place,
Machine learning

Still very much **Solutions looking for Problems**  
Training Sets can be a huge cost & undertaking;

Accuracy often will not sufficient or affordable  
**Need to consider when and how to pragmatically use**

## BEFORE COMMITTING

**Verify**  
BUSINESS  
USE CASE

**Verify**  
TRAINING SET  
COST

**Verify**  
ACCURACY  
& USEFULNESS

Great findability

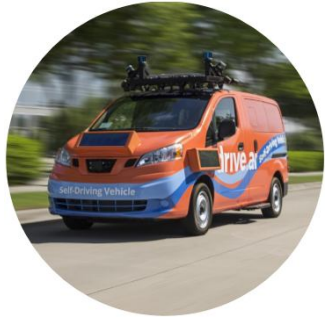
EDRMS migrations

Fileshare migrations

No metadata entry EDRMS

Retention & Disposal

ID personal/sensitive info



There is a growing sense that the technology has, so far, overpromised & under-delivered  
“We are identifying a **valuable use case** that we can deploy with **today's technology**,”

“For now, drive.ai is keeping things simple”

- all pick-ups and drop-offs happen at **designated stops**
- vans are painted a **garish orange and clearly labelled** as self-driving vehicles
- city authorities to tell it where any **roadworks** are each day, so that its vehicles can avoid them
- Drive.ai will limit the service to **daylight hours**, which makes things simpler and safer

“It might sound as though drive.ai is cheating, by simplifying the problem in so many ways. But the end result is still a useful service”



**Auto classification is do-able today**

Findability

Retention & disposal

Migration

Sensitive info protection

Digital enablement

**Hard wired rules get you a long way**

Inheritance, inferring metadata, pattern matching, need UX/functionality that makes this easy to do

**Carefully evaluate machine learning potential uses**

Constrain the scope down to increase accuracy, reduce cost

**Outcome is usually a mix/match combo**

Watch this space...



# About Information Leadership

► let's make work better



let's make work better

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**Information Leadership is one of only 24 partners worldwide for advisory & implementation services**

Content Services  
Partner Program  
Charter Member

We are a Microsoft Gold partner and help many New Zealand organisations get SharePoint right. This includes **over 120 implementations** as well as ad-hoc help for commercial, health, not for profit, science, education, utility, local and central government



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## What we do

365

- Get started
- Reviews & makeovers
- Productivity tools

## Training events

## News

## Case Studies

## Resources

- Whitepapers
- How to...