



Welcome!

AIIM Florida Chapter works hard to provide Intelligent Information Professionals up-to-date information on the latest information management technologies and providers, through continuous research, consulting, collaboration, regular educational events and communications. The AIIM Florida Chapter, formerly known as the AIIM Gulf Coast Chapter, is one of the key AIIM Chapters worldwide.

Please read on for a very important letter from our President, recaps on recent webinars, the technological gap in Document Management in Latin America, a great upcoming event from TWAIN Working Group, and how you can help AIIM Florida continue our mission in 2024-2025!

A Letter From Our President



Hello to our Members and Friends of the AIIM Florida Chapter,

Here's a bit of venting about the contagiousness of reinventing. I find that we are in a bit of a flux and surrounded by confusion around the phrase "if it ain't broke don't fix it". The idea of "shall we discuss a change to this or should we discuss a change to that?" seems to dominate a lot of our organizational and operative discussions anymore.

As we learn by project management guidelines, there are indeed a number of procedures and bases for doing things that can be just as well left intact in order to build better programs around them.

Nowadays, we see a lot of effort put into whether we should look at replacing what is currently in place as rules, guidelines or processes. And there is never a bad reason for

looking at changing some of the rules. It can be found that some of the rules that are thought to need changing are really found to be, misguided, early interpretations made by those laying out the project. Too many times, no one ever bothered to go back to the base objectives and guidelines that initially set the base for the process or project in the first place.

There is such an inclination anymore for simply scrapping the old, tearing it all down and building it all over again. Along comes the newly influenced idea or a new AI routine module and in consequence, what made the product great was all thrown out the window along with a huge amount of dollars of branding over the years.

Change is good. I'm not advocating for never making modifications. However, it is always very important to examine the foundation, the structure... what got you there. We simply do not have to be a change agent for every single thing that stands in our path.

Step #1 is an imperative examination of the well-documented process that existed there before you came on board. And if there is none, your suggestions for change and the reconnoitering of process will be a very welcome addition to the project.

Most importantly, be sure that you do the hard work of documenting that process and every step along the way and every guideline that needs to be in place for your team's approval.

This has been something very top of mind for me for a while. It really bubbled to the top with some recent presentations by [Bruce Bolton](#), EVP of Portford Solutions/DocuNECT, [Jason Cassidy](#), CEO of ShinyDocs and in May with [Adrienne Bellehumeur](#), Owner of Risk Oversight and published author. Every single one of these excellent presenters referred to building on the basis of the key differentiators in their products or their guidance. In every case, there was an established, firm foundation that was built upon.

It was not a coincidence that Adrienne's presentation was underpinned by clear statements around setting up clear documentation and processes but taking care to tie up loose ends and even in putting closure to them. I'll leave it to you to watch her webinar on the video link placed below in the newsletter.

Just as important is that you get ahold of Adrienne's book, "The 24-Hour Rule and Other Secrets for Smarter Organizations". I suggest that you take special note of Chapter 3 - Capturing (as in Document it to Remember it) and Chapter 4 - Structuring. And if you think "Oh but my team and I work remotely" do note that Adrienne wrote her book in 2023 after being hit by the harshness of the pandemic just like the rest of us. You'll like what you read.

So go for the change that you seek. Do it without just making change for change's sake. If you are self-driven to be the recognized changemaker for your company, be sure to coordinate your process improvements with the documented processes in place. Read those carefully before getting started. And then...document...document...

Sincerely,

Craig

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The Technological Gap in Document Management in Latin America: specific cases from different Latin American countries and examples of good practices

by Alvaro Arias Cruz, Bogotá, Colombia

As a way of expanding on the article title, today I would like to mention just a few real examples of cases and good practices in document management that exist today in some Latin American countries such as Chile, Colombia, Brazil and Mexico. In the future, we will surely go deeper into some of them to establish the level of depth, focus and progress that Latin America has in this area, as well as to establish which are the most important challenges that are being overcome.

Chile:

- The National Archive of Chile has implemented an electronic document management system that has improved efficiency and access to information.
- The Chilean government has also developed a series of initiatives to promote the adoption of electronic signatures and electronic invoicing.
- Chile's Internal Revenue Service has digitised its document management processes, which has led to cost reductions and improved customer service.

Mexico:

- Mexico's Archivo General de la Nación has digitised millions of historical documents and made them available online.
- The Mexican government has also implemented an electronic document management system for the federal public administration.
- The Mexican Ministry of the Interior has implemented an electronic document management system for its administrative processes.

Colombia:

- Colombia's General Archive of the Nation has developed a series of tools and resources to help public entities improve document management.

- The Colombian government has also implemented a national electronic records management policy.
- The Universidad de los Andes in Colombia has implemented an electronic records management system for its academic archives.

Peru:

- The General Archive of the Nation of Peru has developed a set of standards and guidelines for records management in the country.
- The Universidad Nacional Mayor de San Marcos of Peru has implemented an electronic records management system for its academic archives.

Brazil:

- Brazil's National Archives has implemented an electronic document management system that has improved the efficiency and transparency of the public administration.
- The Brazilian government has also developed a series of initiatives to promote the adoption of electronic signatures and electronic invoicing.

The following is an overview of good practices in Chile, Mexico, Colombia and Brazil:

- Chile's Archivo General de la Nación has developed a series of guides and manuals to help public entities improve document management.
- The Mexican government has implemented a training programme for public officials on the use of the electronic records management system.
- The Colombian General Archive of the Nation has created a web portal that provides information and resources on records management.
- The Brazilian government has developed a series of awareness campaigns to promote the importance of records management.

I share some additional resources that are a reference on document management and archives administration in Latin America, so that you can explore and learn directly about these experiences.

- Digital Repository of the Ibero-American Archives Network
- Portal of the Latin American Archives Association: <https://www.alaarchivos.org/>
- Website of the General Archive of the Nation of Colombia: <https://www.archivogeneral.gov.co/>
- Website of the General Archive of the Nation of Mexico: <https://www.gob.mx/agn/>
- Website of the General Archive of the Nation of Peru: [invalid URL removed] Digital Repository of the General Archive of the Nation of Chile: <https://www.archivonacional.cl/>
- Portal de Gobierno Electrónico del Gobierno de México: <https://www.gob.mx/>

Finally, the technological gap in document management in Latin America is a complex problem that requires a multifaceted solution. With a strategic approach and a firm commitment, the region can move towards modern and efficient document management. There are still many challenges and many opportunities for improvement.

AIIM Florida Chapter is a Proud Sponsor of this Event - Join Us!

TWAIN Direct Developers Day 2024 Dates Announced with OpenText as Lead Sponsor and Contributor

Enabling developers to create TWAIN Direct cloud scanning applications with the ability to incorporate OpenText Thrust Services and C2PA content authenticity technology



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workflow



Raleigh, NC – June 13, 2024 – The TWAIN Working Group (TWG), a not-for-profit organization providing and fostering a universal public standard for image acquisition devices, announced today that it will hold its second TWAIN Direct® Developers Day event on November 13-14, 2024 in Tampa, Florida. This event will encourage scanner manufacturers, Independent Software Vendors, and businesses to revolutionize their Capture technologies with driverless web and mobile document scanning applications, eliminating the need for legacy USB scanner technology.

TWG's first TWAIN Direct® Developers Day allowed attendees to develop fully functional TWAIN Direct scanning applications with direct hands-on support and

supervision of the TWAIN Working Group's team of experts in one day. TWG's upcoming Developers Day event will go beyond standard TWAIN Direct scanning applications; developers will have the ability to incorporate OpenText Thrust Services such as Risk Guard Service to identify PII information in a document, Capture Service to extract all relevant data from a document and use a local database (Vertica CE) to load extracted data into a relational database.

"Partnership on the Developers Day event makes a lot of sense for OpenText, TWG and event participants. There is good synergy between many of our APIs and TWAIN Direct Cloud or Network scanning applications," said Chris Wynder, Director of Product Marketing, Developer Services and OEM program with OpenText. "Developer Day participants will leave with a solution that goes beyond Capture to provide improved compliance and bring unstructured data into large datasets that can be incorporated into any application or AI use case."

[Read more](#)

TWAIN Working Group Partners with AIIM International

Not-for-profits join forces to further educate the Information Management community around emerging technologies

Raleigh, NC – June 18, 2024 – The TWAIN Working Group (TWG), a not-for-profit organization providing and fostering a universal public standard for image acquisition devices, announced today that it has joined the AIIM International Leadership Council, and welcomes AIIM as a TWG Liaison Partner. This alliance will empower both organizations to optimize their information management strategies through collaboration, research, and the sharing of best practices with one another for the benefit of the Information Management community.

The AIIM International Leadership Council encourages the development and adoption of cutting-edge information management technologies and practices, while providing a platform for industry leaders to share insights, challenges and solutions. The Council conducts and disseminates research on emerging trends, and advocates for industry standards and policies. AIIM offers a multitude of resources and networking opportunities to support education and career development.

Will You Help AIIM Florida?

The AIIM Florida Chapter would like to take this moment to thank you for attending our virtual and on-site events, following us on social media and subscribing to our newsletter. Your support of our efforts is truly appreciated. We plan to continue to work hard for you, to deliver educational programs and knowledge around Intelligent

Information Management including AI, Content Management, Information Governance and more.

The AIIM Florida Chapter is solely self-funded. We are a not-for-profit driven by a board of volunteers dedicated to the betterment of the industry. Although we have no paid staff, we do have administrative costs around our ongoing programs and related costs in our dedication to keep all informed through our website and other communication vehicles.

Will you help us continue our mission?

You do not have to be in Florida, an AIIM International or AIIM Florida member to support our mission, leverage our resources or attend our events. All are welcome and encouraged to participate!

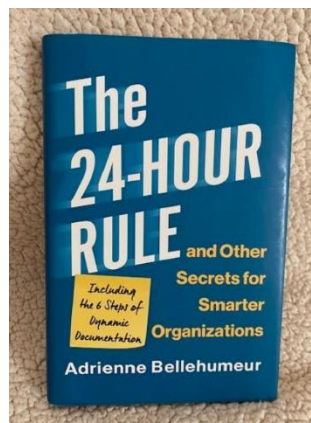
Today we humbly ask that you consider a donation or sponsorship to assist us in our efforts. Your kind support is sincerely appreciated.

[DONATE](#)

Did you miss these great webinars?

The New Culture of Documentation

How Dynamic Documentation Transforms Productivity and Problem-Solving



*presented by Adrienne Bellehumeur, CPA, CA and Owner,
Risk Oversight*

Documentation has traditionally been viewed as “static.” That is, lifeless piles of paper, dusty binders on a shelf, records in your database. But when applied properly, documentation is “dynamic” – it actively moves you and your organization forward and changes outcomes.

In today's economy, there's a push everywhere to conserve resources and “do more with less.” But organizations can't become more efficient or effective if they don't teach, encourage, and provide the tools for people to work better — on their own and in sync with others. This includes better skills, habits, disciplines, and frameworks for how everyone (not just IM managers) creates and manages documentation.

No matter what your situations—your files are a mess; you can't get your team to follow up; you're stuck in a vortex of meetings; no one reads your processes; your fancy system was a bust; your “transformation” initiative is spinning in circles; your expensive, “best-in-class” consultants failed to deliver real change— Dynamic Documentation is about solving your business problems through 6 distinct steps: Capturing, Structuring, Presenting, Communicating, Storing and Leveraging, Leading and Innovating.

This session is designed to open the discussion and provide concrete (low tech!) approaches to enhance our productivity and problem-solving specifically around how we leverage information and documentation for ourselves and for our teams.

[VIEW RECORDING](#)

The best predictor of Information Management Success is your Staff's ability to find the Content they need



Presented by Jason Cassidy, CEO, Shinydocs Corporation

When tasked with Compliance, Privacy, and Security, the same work to identify and understand your Content yields a secure search experience that will fund your program and make you famous in a good way.

View this video and learn how to take your content management projects safely and securely in to the future!

[VIEW RECORDING](#)

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