

Keywords

Volume XXXIX Issue VII
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GBMC ARMA
P.O. BOX 207
Simpsonville, MD 21150

*Keywords is the official newsletter of the Greater Baltimore Maryland Chapter (GBMC). The Chapter's official address is above. The **Keywords** newsletter is published monthly from September through June of each year.*

GBMC/ARMA is not responsible for the opinions of writers of articles published in this newsletter.



MARCH 2010

MONDAY, MARCH 1, 2010 MEETING

PLACE: BWI Ramada Inn & Parkstone Grille
Annapolis Room
7253 Parkway Drive
Hanover, MD 21076
410/712-4300

TIME: 5:30 PM
Registration and Networking

6:00 PM
Dinner – Buffet
Signature Spinach Salad
Southern Fried Chicken
Top Sirloin w/Mushroom Demi-Glaze
Macaroni and Cheese
Steamed Vegetables
Rolls and Butter
Dessert – Gourmet Cakes

6:45 PM
Announcements & Speaker

COST: Members - \$35.00 Guests - \$40.00

RSVP: Please use the on-line Evite to respond by **NOON on FRIDAY FEBRUARY 26, 2010** to Linda L. Staub; If you must reply via phone, please call 443-539-0219

By email: lstaub@impaqint.com

**Please notify Linda for special dietary requests*

DIRECTIONS: From US 29N take MD-100E, take Exit 8 for Coca-Cola Drive. Turn left at Coca-Cola Drive/Md-103E. Continue to follow Coca-Cola Drive. Turn right at Parkway Drive and destination will be on the left.

NOTE: If you make a reservation for dinner and do not attend, you are responsible for payment to the Chapter.

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**This Month's Speaker:
Mark McGovern**

**“Document/Records Management Capabilities -
Microsoft Sharepoint 2010”**

Mark McGovern holds the position of Manager, Solutions at DocPoint Solutions. At DocPoint Solutions, Mr. McGovern oversees the implementation of Sharepoint Solutions, including comprehensive electronic content management (ECM) systems. McGovern holds several technology certifications, including MCSE, MCSA, CCNA and is certified in Global Information Assurance by the SANS Institute. His extensive application, software and systems knowledge includes expertise with a wide range of Microsoft Sharepoint.

Previously, McGovern was the Director of IT at Havas, one of the world's largest advertising and media agencies. McGovern was responsible for the information systems at the North American Headquarters of Havas in Murray Hill, New Jersey, which oversaw tax, accounting and treasury services for the company's locations throughout North America. Prior to that position, McGovern served in IT roles at companies that included Circle.com McGovern was also the owner and president of Patapsco Technology Solutions, a technology firm in Maryland.

From the Desk of the President... As I see it...

THE SPRING SEMINAR IS COMING!
THE SPRING SEMINAR IS COMING!

GIVE US YOUR DAY FRIDAY, MARCH 26th!

Dear Chapter Members and Guests:

What can a good day of work mean to you? How would you like to learn about new document management policies and procedures and document management retention in an interesting way? How much would you like to listen to interesting speakers/panelists and some of the best professionals in the industry showcase quality training in a cost effective manner?

At our Greater Baltimore Maryland Chapter (GBMC) Spring Seminar, on March 26, we have put together a special day of training and learning opportunities for just a \$79.00 registration fee which includes a continental breakfast and lunch. We would like for you to be a part of this learning opportunity. You will be able to benefit from a wide range of training sessions. You probably have already received notification of the Seminar which is being held at the Applied Physics Laboratory through your email inbox. In case you have missed that email we have included a flyer of the event in this issue. Please note: the seminar is not only for members of ARMA but this is an opportunity for anyone who works with you. The cost is the same for everybody.

It would be really nice if you can circulate the Spring Seminar flyer to all of your deserving colleagues who will benefit immensely from this seminar program. This is a day of work but you will have fun and will probably make some friends while you are there! For more information, please contact any GBMC Board member or the Programs Chair and Event-Coordinator: Greg Chalmers.

We look forward to seeing you at the Seminar.

The Blended Solution: Integrating Digital and Hard Copy Document Management

Business documents are the lifeblood of every organization, regardless of industry. They are intellectual assets that drive strategic business processes, and as such, must be easily accessible as well as protected. However, most document solutions vendors have a one-dimensional view of document management, providing either offsite hardcopy document storage or digital conversion and archival via a web-based repository. In reality, neither of these alternatives by themselves is the complete solution.

As desirable as it would be to migrate to a completely paperless environment, the fact is that paper continues to be a major piece of the critical information infrastructure of an organization. It is still a key component driving most business processes and supplements digital workflows.

Maintaining and managing all of a company's important records in one format fails to recognize the reality that most organizations have many years of both paper and electronic documents, requiring that they retain both digital and physical archives. While the long term goal is to convert paper documents to electronic files, the immediate need is for a blended solution that allows integrated management of documents and records in a variety of formats – however and wherever they are needed.

In most companies, documents exist in multiple locations, a number of different formats and media, and are managed by several systems and processes, both automated and manual. Rather than eliminating paper, the innovations brought about by technology have created even more in a lot of instances. And the number of paper documents created each year is continuing to rise. In this environment, organizations need a single integrated approach to classify, apply retention policies, and store their records according to fiscal, legal, and regulatory requirements, whether paper or electronic, active or inactive.

Integrated document management is not limited to one storage or conversion methodology, but is a blended solution tailored to the short and long term requirements of each customer's business. It is a systematic approach that creates a document storage, records retention and protection strategy that matches an organization's needs for archiving, accessing, securing, and managing their critical business data. To achieve competitive advantage in today's economy enterprises must manage their documents so they can be effectively utilized to attain organizational goals, and only a vendor that manages the complete lifecycle from content creation to disposal can meet this objective. This approach also addresses the most important priorities in today's document management environment.

Information Security, Privacy & Compliance.

With data becoming more decentralized, distributed through a variety of electronic and physical means, and a more mobile workforce, information security and privacy issues are becoming a top priority for every organization. With new legislation mandating how confidential records are accessed, used, transmitted, and disposed, organizations must move quickly to protect their documents, whether in paper or electronic form. This includes developing a comprehensive document privacy protection plan, outlining the processes and controls for maintaining chain of custody over critical records.

Managing Document Retention Policies

Records retention has recently become a hot topic for enterprises in all industries, primarily due to the increasing number of statutory requirements and legislation governing this area. The cost of poor retention practices can be in the tens of millions of dollars in fines, as some companies have learned, for noncompliance with Securities and Exchange Commission retention rules.

(CONTINUED ON PAGE 5)



However, a responsible records retention policy is not just about retaining records, it is also about records destruction. If a record is retained too long, it can also be expensive, as companies expose themselves to litigation risks, and could also be violating privacy rights. Although some high-profile court cases brought the records retention issue to light, the implication is clear: an integrated approach to managing all of your documents is the only way to gain control over the number of physical and digital records in existence and those being created on a daily basis.

Disaster Recovery

Enterprises run on their data, and the value of critical documents and records grows each year. With this vital data stored in both paper and digital formats, in multiple locations, it becomes an absolute requirement that these records be protected by a common, integrated document management solution. Internal practices and business policies currently in place may no longer be adequate to meet disaster recovery requirements, and they may not meet the security and retention standards of an auditor. An integrated strategy of off-site storage combined with a secure electronic document repository, ensures businesses that their records are secure, documents can be controlled and tracked, audit trails are in place, and their business continuity, data retention and security requirements are being met.

Litigation

According to the Third Annual Litigation Trends Survey (October, 2006, Fulbright & Jaworski LLP), eighty-nine percent of more than 300 U.S. companies had some form of litigation pending. Most of these companies were not prepared to provide the level of document discovery required in either a civil case or a regulatory investigation. With both paper and digital documents residing in multiple storage facilities and repositories, with different management practices, tracking capabilities, search tools, and retention and destruction policies, it is virtually impossible to comply with discovery requirements in a timely manner. The only reasonable approach to effectively meeting these requirements is a blended solution that manages all forms of documents, whether paper or digital, stored in an electronic repository or in an off-site facility.

Mergers and Acquisitions

The trend in some industries toward accelerated merger and acquisition activity has put an increased focus, as well as burden, on effective document management. These transactions increase the need for an integrated storage management solution, as paper documents will be stored in physically different locations without a common tool to control, manage, or access records. Digital documents will reside in different repositories, usually accessible through separate software applications, with no common document management or integration. With eighty percent of an enterprise's data existing in the form of documents, files, images, and other similarly unstructured content, it is critical that an integrated approach be taken to ensure uninterrupted processes, proper compliance, continued customer loyalty, and full realization of the benefits of the merger.

Conclusion

In today's document-intensive environment, with the conversion and management of an increasing volume of both paper-based and digital information, it is critical for organizations to utilize the expertise of a company providing a blended document storage solution. While a lot of vendors offer either hardcopy storage or a digital document repository, neither of these services provides the complete document management solution. With the increased demands of information security, privacy and confidentiality, regulatory compliance, document retention policies, and disaster recovery, coupled with an organization's budget and space constraints, an integrated, blended approach is an absolute requirement.

**GREATER BALTIMORE MARYLAND CHAPTER
OF THE
ASSOCIATION OF RECORDS MANAGERS AND ADMINISTRATORS**

2010– 2011 NOMINATION BALLOT

Please review the list of candidates in **EACH** category listed. If you would like to add an individual for any of the Board positions, please be sure to have the individual's approval.

President

Nomination Committee: o **Chad Doran, CRM**
Write-In: o _____

Vice President of Programs

Nomination Committee: o
Write-In: o _____

Vice President of Membership

Nomination Committee: o **Guido DiGiandomenico**
Write-In: o _____

Secretary

Nomination Committee: o **Angela Minturn**
Write-In: o _____

Treasurer

Nomination Committee: o **TBD**
Write-In: o _____

Board of Directors

3 Year Directors

Nomination Committee: o **Linda Staub**
Nomination Committee o **Anthony Mallett**

2 Year Directors

Nomination Committee: o **Allison Murrihy**
Nomination Committee: o **Michael Perez**

1 Year Directors

Nomination Committee: o **Valecia Winston.**
Nomination Committee: o **Regina A. Martin**

Write-In: o _____

Only persons who are members in Good Standing are eligible to be on the Board of Directors in the Greater Baltimore Maryland Chapter of ARMA. (A member in Good Standing is one that has the Chapter and International dues current.)

Please let me have the name/names of any additional individuals for the respective office(s) by April 2. At that time, the final ballots will be mailed to all members of the GBMC Chapter for voting purposes.

Phyllis Pritchett
Chairman, Nominating Committee
ppritchett@howardcountymd.gov
410-313-6195

Announcements

The Greater Baltimore Maryland Chapter of the Association of Records Managers and Administrators (GBMC ARMA) board members agreed during February 1, 2010's meeting to cancel the chapter's April 5, 2010 dinner meeting due to the Spring Seminar being held on March 26, 2010 at Johns Hopkins Applied Physics Laboratory.

Certified Records Manager (CRM) Examination Preparation Information

Who: The Greater Washington, DC Chapter (GWDC) of ARMA

What: Help Preparing for the CRM Exam

When: March 15, 2010

Where: 1152 15th Street, NW, Washington, DC 20005-1706 Phone: 202- 339-8400

Presenters: Juanita Skillman, CRM and Past President of ARMA International and Deborah Gearhart, CRM and Michigan State Records Manager and ICRM President-Elect

Becoming a CRM (Certified Records Manager), the most respected credential among professional records and information managers, has many advantages in today's complex and fluid information environment. CRMs are in more demand now than ever! This workshop will help you prepare for the CRM exams by identifying what areas to study for each exam part and where to find the resources to help you learn what you need to know.

Track One will cover and Introduction to the CRM Exam and overviews of Pars 1-5 including one hundred sample questions.

Track Two will focus on Part 6, the case studies portion of the exam. Attendees will receive strategic tips for passing Part 6 and will take two actual practice exams, which then will be graded in the class. Certification Maintenance requirements will also be discussed. Attendees choosing this track must bring their own laptop computers to use for the exams. No paper exams will be available.

Cost:

\$150.00 for ARMA Members

\$185.00 for Non-Members

Catered lunch and snacks included

Online payment is available at:

<http://www.armamar.org/GWDC/Event%20Registration.htm>



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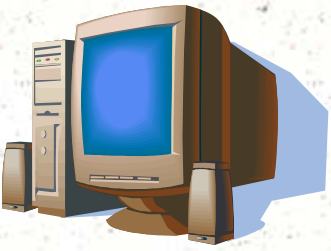
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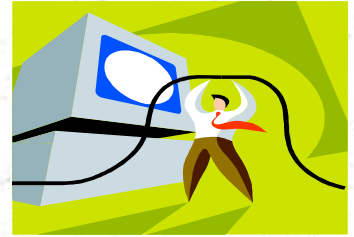
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Information Security begins with YOU.....



As we learned in February 2010's presentation on information security, protecting our information is invaluable. Simple ways to protect our information include:

- Memorizing your access passwords and codes (and do not share them with anyone)
- Locking your workstations (this includes your PC, desk drawers, etc.)
- Never open unknown email attachments or agree to download and/or register for any type of software or even anti-virus protections.
- Look for the secured sites that contain URL's that began with "https://, not "http://" when making online purchases or exchanging any financial information or Privacy Act (PA) information.



Whose records are these?

Identifying Federal Records

Throughout my records and information management career, I have often found myself at a crossroads with trying to figure out who or where unidentifiable records belong to. But thanks to team efforts, records retention schedules, laws, regulations and statute authorities it's easy to connect the dots. If you work for or support a federal government agency records management program, here are a few pointers in identifying federal records:

A *record* according to 44 U.S.C, Chapter 33, Sec 3301) is:

“...all books, papers, maps, photographs, machine readable materials, or other documentary materials, regardless of physical form or characteristics, made or received by an agency of the United States Government under Federal law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the Government or because of the informational value in them.

- Recognizing a federal record by asking yourself the following questions:
- Did I generate or receive the information while conducting agency business?
- Does the item document my agency's activities or business transactions? Or did my agency create it?
- Even if copies exist elsewhere, did my agency originally create the item?

SERVICES FOR TODAY'S LEGAL NEEDS

Materials for publication may be submitted to Keywords editor at the following address:

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