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THIS MONTH'S SPEAKER: NICK CARUSO

“LESSONS LEARNED USING MULTI-FUNCTION DEVICES TO EASILY SCAN DOCUMENTS INTO CONTENT MANAGEMENT SYSTEMS, WITH A FOCUS ON EASILY IDENTIFYING AND ASSIGNING RECORDS RETENTION SCHEDULES”

Nick Caruso is a leading industry professional involved in many of the largest and most complex document scanning and data capture projects in the federal government.

He began his specialized career in high volume document scanning, working on enterprise projects with the IRS, OPM, USPTO, DoD, Census, and an assortment of classified projects within the Intelligence Community. Over the last few years, following the market demand for front-office scanning, Nick has devoted most of his time providing knowledge workers the ability to convert scanned documents into organizational workflows. His most recent project has been the successful implementation of Multi-Function Device (MFD) scanning on a single interconnected solution with the Navy and Marine Corps Intranet (NMCI), which supports scanning for over 350,000 users.

Nick is an active member in the document capture community, and has been a speaker and facilitator at numerous local and national forums



MEMBER SPOTLIGHT



If you want to learn about Toastmasters, just ask **Juernene Speights**. She can't say enough about the Toastmasters organization and what it can do for people on a professional and personal level. Toastmasters — the international organization dedicated to helping people become more comfortable speaking in public— drew Juernene's attention in 1998, when she joined APL's Toastmasters Club. Since then, she has gone on to leadership positions not only in the APL club, but also at the regional and district levels, serving as an officer, leader and promoter of all the benefits that Toastmasters offers. On May 2, Juernene's dedication paid off when she received Toastmasters' highest honor —the Distinguished Toastmaster Award.

To earn the recognition, one must complete 40 required speeches, participate as a leader and officer at multiple levels of the organization, mentor others, sponsor at least one new club, and complete a leadership program. It sounds like hard work, but Juernene says it is her passion. "I love to share the benefits of Toastmasters from a personal perspective," she says. "I have gained so much with my participation in Toastmasters that I highly recommend it to everyone I encounter." Speights, currently works as a records manager in the Human Resources and Services Department. She says that APL's Toastmasters Club meets twice a month and is always looking for new members. "We are an open club which means we have members from the Lab and the community. It has grown tremendously over the 46 years of its existence, with active staff, community members and Lab retirees," she says. Juernene joined our ARMA chapter this year and she encourages anyone interested in more information about the Toastmasters international organization to visit www.toastmasters.org.



GBMC/ARMA SEPTEMBER 14TH Dinner Meeting Attendees:

Cynthia Belcastro; Jim Blanchard, Secure Scanning Solutions; Ed Buchanan, Montgomery County Government; Greg Chalmers, Quality Associates, Inc; Dave Dibattista, Paige Company; Guido DiGiandomenico, Atlantic Data Records Mgt; Chad Doran, JHU/APL; Linda Dorsey, JHU/APL; Connie Durkin, Metropolitan Archives; Betty Friedman, URSANAV; Peggy Gaegler, JHU/APL; Daniel Hunter, Iron Mountain; Allison Jording, Iron Mountain; Susan Kalbarczyk, AAI; Monica Kenny, Office Shredding, LLC; Tony Mallet, TMSSI, LLC; Margie Malloy, PBE; Larry Markle, MEDI; Angela Minturn, GRM Information Mgt Services; Kathleen Moyers, Crown Central, LLC; Joseph Mulligan, Iron Mountain; Reid Palmieri, Iron Mountain; Michael Perez, Iron Mountain; Phyllis Pritchett, Howard County Government; Mike Smith, FileTek; Juernene (Bass) Speights, JHU/APL; Linda Staub, IMPAQ International, LLC; Rick Taylor, Montgomery County Government; Valecia Winston, ASRC/EPA; Invited Guest: Debbie Mansfield; Speaker: Gary Szukalski;



Records Management for Everyone

An On-line Training Course For All Federal Employees

The National Archives and Records Administration (NARA) has developed "Records Management for Everyone", an on-line training course for all Federal employees. This course is available through OPM's USA Learning site and as a standalone CD from the National Archives. All Federal employees are encouraged to review this course to introduce the basic concepts of records managements

Records Management for Everyone provides an understanding of basic records management principles and how they affect daily work. This course explores the techniques and protocols that govern the lifecycle of a record, including concepts of adequate and proper documentation, disposition, and where to go for help. It discusses how managing records and information supports the work of the Federal government and improves staff effectiveness. There are no formal prerequisites.

By the end of this course, participants will be able to identify Federal records and the key requirements for managing them; understand records management principles; understand the repercussions of poor records management; and know where to go for records management assistance within an agency.

The target audience includes all government employees and contractors. This course is designed for all levels of employees - from senior management to the file clerk - or anyone with the responsibility for creating and maintaining Federal records.

To order a copy of the course on CD, please contact the records management training program at nara.recordsmgtraining@nara.gov or 301-837-1676. The software/source code is also available for agencies that would like to install the course in their own Learning Management System.

[Access "Records Management for Everyone" through NARA's Learn Center](#)



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

"Support the Chapter"
By: Linda Dorsey

First of all, I would like to take this opportunity to thank all of you for attending the first Dinner Meeting this year at That's Amore' in Columbia, MD. Recognizing that many of you were accustomed to getting the Keywords Newsletter by mail, I am very happy to see that the electronic version of the newsletter has been well received. We considered making this transition a few years back, but this year, we were able to put our thoughts into motion.

In this issue of the newsletter, we discuss information about our planning for the upcoming year. At the June regional meeting in Raleigh, N.C, I met with some of the other regional presidents/leaders from the chapters of Northern Virginia, Gaithersburg, and Greater DC to discuss a Community Service event and to have a Shredding Day. This event is expected to be held in April on Earth Day. We are eagerly seeking a local shredding company to sponsor us for this event. Although the National Capitol Chapter of AIIM has agreed to join us in promoting our event, we would appreciate it if our members would volunteer to assist us with this great endeavor.

We are also in the planning process to sponsor a Spring Seminar. Details will be forthcoming regarding this event. I would invite you to check with local vendors and ask if they are willing to sponsor us for this event, as we are currently looking for a location to host this event. Updates will be provided as we get closer to this event.

Quality Associates, Inc. will again be sponsoring our meeting. We thank them tremendously for their support.

I failed to mention in last month's issue that FileTek, Inc. was the sponsor for our September meeting. I would like to express my sincere appreciation to File Tek, Inc. for a wonderful speaker/presentation and for the sponsorship.

I look forward to receiving calls about Sponsoring our chapter meeting for \$250.00 from our local vendors as soon as they are ready. I would encourage all members to actively tell their vendors about our Sponsorship Opportunity where vendors can come forth and network about their business/organization.

In the meantime, thank you for the professionalism, dedication and passion you bring to each ARMA meeting.



Web 2.0 Records and E-discovery

By
Chad J. Doran, CRM

In December 2006, the Federal Rules of Civil Procedure (FRCP) were updated to include the discovery of various forms of electronically stored information (ESI). The definition that was adopted is extremely flexible and was designed to accommodate new technologies and methods of processing computer-based information. As the advisory comments state, the definition was “Intended to be broad enough to cover all current types of computer-based information, and flexible enough to encompass future changes and developments”. The specific rules that were affected by the update included rules 16, 26, 33, 34, 37 and 45. While each of these rules impacts the e-discovery process, rule 34(b) clearly establishes that electronically stored information is discoverable and that parties are required to produce various forms of ESI. Rule 34 specifically states that all information “including writings, drawings, graphs, charts, photographs, sound recordings, images and other data or data compilations stored in any medium from which information can be obtained – translated, if necessary, by the respondent into reasonably usable form...” In essence, information technologies and media such as voice mail, metadata, backup tapes, instant messages, handheld devices, flash drives, databases, in addition to a wider range of future technologies, are now subject to the updated e-discovery rules.

At the same time that the e-discovery rules were adopted, the technological environment was changing at an increasingly rapid pace through the development and overwhelming acceptance of Web 2.0 technologies by users. The technologies come in a variety of forms including blogs and micro-blogs, wikis, instant messaging, web-portals, and social networking sites. These Web 2.0 technologies incorporate elements of collaboration and are highly interactive in nature. Content stored in Web 2.0 technologies is also highly distributed and allows the user to have a significant amount of control over how information is managed. The information contained within these technologies is constantly changing and not managed by a single custodian. Unlike Web 1.0 technologies, Web 2.0 content is typically managed by a group of individuals that are exchanging information in a fluid and constantly changing manner. Such technologies have been developed for use internally behind the organizational firewall or can be managed externally through “cloud computing” technologies where information is hosted outside of the control of the organization, adding yet another form and type of complexity. In general, these tools are very different from the traditional word-processing and database tools that are responsible for generating a majority of the information that is created within organizations.

At the present time, social networking sites such as Facebook and Myspace alone account for over 200 million users, a number which continues to grow at a rapid pace. Web 2.0 technologies are also increasingly being adopted for business purposes in both the private and government sector. For example, the DOD is utilizing social networking sites for recruiting purposes, local police departments are utilizing these technologies for law enforcement purposes, and organizations such as Pfizer and Comcast have implemented wiki and micro-blog technologies to further their business needs.

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Web 2.0 Records and E-discovery Cont....

(CONTINUED FROM PAGE 4)

Based upon the broad definition of ESI adopted under the updated FRCP, much of the information stored in Web 2.0 technologies could be deemed to be reasonably accessible, therefore potentially subject to discovery. As a result, organizations must consider issues such as retrieval, preservation, and production of information that is stored in these technologies. In order to mitigate the risk and cost associated with litigation involving information stored in these technologies, organizations will likely need to incorporate these technologies into a legally sound records management program.

Social networking sites are expected to continue to grow in popularity and will be increasingly used by both individuals and corporations. Based upon a review of the legal literature, social networking sites and technologies may be discoverable as ESI. However, important issues surround the discoverability of social networking sites such as accessibility, admissibility (including authentication and privacy) and the means of preservation and production. Overall, the case law and legal consensus are also still evolving on this topic.

There is an important role for records managers in the e-discovery process to help mitigate risk and reduce costs associated with the preservation and production of ESI. However, the literature indicates that many complex issues continue to exist, making it difficult for records managers to apply past practices to content in Web 2.0 and social networking technologies. While there is little specific guidance in the records management literature on management of social networking applications as a record, there is a growing consensus in the records management literature regarding the management of Web 2.0 records (in general). These recommendations include: (1) implementing relevant policies, (2) adopting enterprise versions of Web 2.0 tools, (3) restricting the use of external Web 2.0 applications (when possible), and (4) rethinking past practices to make better use of Web 2.0 technologies (such as making use of user-tags to schedule records).

Future research should address the difficult issues surrounding the management of social networking sites as records. Important issues such as how to integrate social networking into existing suite of records management tools and applications will need to be addressed. In addition, further research should address specific methods to better leverage the user-generated metadata in social networking applications to potentially appraise records and for applying retention. Future research may provide recommendations regarding privacy settings and best practices to ensure authenticity when managing social networking sites as record. Additional research is also needed to ensure that information contained in social networking applications may be preserved and produced in a consistent and legally defensible manner.

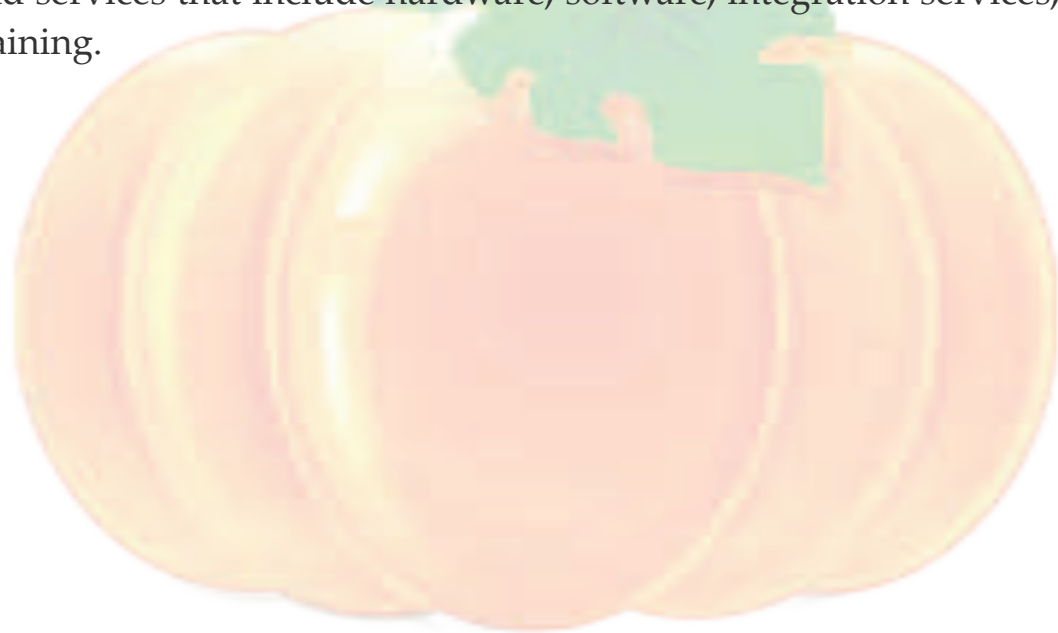
As the demands on organizations change in response to the legal environment (and as new technologies increasingly adopted) it is important for those in decision-making roles to understand the way in which these two complex issues (e-discovery and technology) interface with records management policies. In some cases it is expected that new methods will be needed to address these novel challenges. While there is substantial room for further study of this issue, it is evident, based on the research currently available, that records managers should continue to rely on records management practices that have proven to be successful, and these practices will need to be adapted to suit the complexities of this new environment.



This Month's Sponsor...

Quality Associates, Inc. is our Sponsor for the Month of October

Quality Associates, Inc., (QAI) specializes in the conversion of documents and other media to electronic formats. In addition, we provide our clients with cutting-edge solutions that address the many issues that content management brings to an ever-changing marketplace. We offer a full range of document scanning/imaging products and services that include hardware, software, integration services, and training.



Early Registration Discount for Conference Extended to September 4!

[Register now](#) to take advantage of the early registration discount for ARMA International's 54th Annual Conference & Expo. The early registration deadline has been extended until September 4. Held October 15 - 18, 2009 in Orlando, Florida, ARMA International's [Conference & Expo](#) is the premier event for records and information management professionals.

► One-Day Registration Now Available

Can't attend all four days of the conference this year? Then one-day Conference and Expo passes are the ideal solution so that the top opportunity of the year doesn't entirely pass you – and your organization – by. One-day registration includes that day's educational sessions and breaks, an Expo pass, and the session handouts and presentations.

But wait, there's more! Thursday's fee includes Opening General Session and exhibit lunch. Friday's fee includes U.S. Federal Government Day and the Expo reception. Saturday's fee includes the Technology Spotlight. Sunday's fee includes the Closing General session. One-day passes are available for October 15, 16, 17, and 18, 2009, in addition to the [Pre-Conference](#) seminars. Simply go to the [registration page](#) for more details.

► Pre-Conference Seminars

Be sure to take advantage of the outstanding [Pre-Conference seminars](#) available this year to help manage your electronic information, including "[Effective E-mail Management](#)" facilitated by Jesse Wilkins on October 13, "[E-Discovery & Beyond](#)" facilitated by Brian Foster on October 14, and "[Actively Transforming Your ESI](#)" facilitated by Doug Magnuson on October 14. Other pre-conference seminars are the popular "[Records and Information Management: The Fundamentals](#)" with Dr. Mark Langemo and the "[CRM Exam Prep Workshop](#)," which will be facilitated by the ICRM.

► Bookstore Sale!

This year's closing session keynote Randolph A. Kahn, Esq., along with Barclay T. Blair, worked together to create this great resource: *Information Nation: Seven Keys to Information Management Compliance - 1st Edition*. The book introduces information management compliance as a business approach to evaluate, design, and/or improve current information management practices. Get your copy for only \$10 before you attend Kahn's keynote "Better, Faster, Cheaper" at the closing general session October 18. Visit www.arma.org/bookstore to order your copy today!