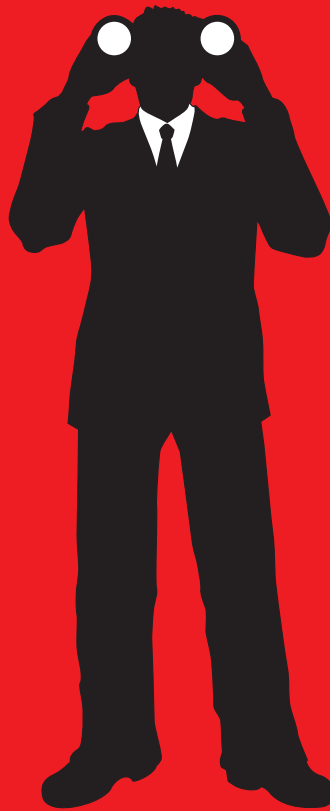


AUTO-CLASSIFICATION



TAKING A CLOSER LOOK

LOOKING AT AUTO-CLASSIFICATION AS A TOOL FOR ENABLING RIM COMPLIANCE

Come to ARMA NOVA's Spring 2012 chapter seminar to get the inside scoop from a panel of experts:

- What is auto-classification?
- How does it work?
- Why consider using this tool?
- Can you rely on it and defend its use in court?
- What are its strengths and weaknesses?
- Has anyone successfully used it to support a RIM program?

When

Tuesday, March 6, 2012
8 a.m. – 5 p.m.

Where

CSC – Executive
Briefing Center
3170 Fairview Park Drive
Falls Church, VA 22042

Registration

www.armamar.org/nova
See page 4 for more information



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AUTO-CLASSIFICATION TAKING A CLOSER LOOK

Tuesday
March 6, 2012

Please join ARMA NOVA for our Spring 2012 chapter seminar, featuring the topic: **Taking a Closer Look at Auto-Classification for RIM Compliance.**

The RIM profession has, for at least the last decade, grappled with the promise vs. the hype of auto-classification. As one member of the Records Management listserv commented, in December 2011:

“I've been waiting for the holy grail for a long time, eagerly and hopefully — but I'll believe it only when I see it in practice and working well.”

ARMA NOVA has assembled a panel of internationally recognized speakers to address the following questions and more about auto-classification:

- What is auto-classification, anyway?
- How does it work?
- Why should we consider using it as a tool?
- Can you rely on it and defend its use in court?
- What are its strengths and weaknesses?
- Has anyone been able to successfully use it to support a RIM program?

Come and take a deep dive with us into auto-classification.

8:00 – 8:15 a.m.	Welcome/Introductions	Carolyn Offutt President, ARMA – NOVA Chapter
8:15 – 9:15 a.m.	Chucking Daisies — The Case for Defensible Disposal	Randolph A. Kahn, Esq. President, Kahn Consulting, Inc. Founder, Council for Information Auto-Classification
9:15 – 10:15 a.m.	How Does Auto-Classification Work? The Science Behind It	Dr. William E. Underwood Research Scientist, Georgia Tech
10:15 – 10:45 a.m.	Break	
10:45 – 11:45 a.m.	What Does Auto-Categorization Have to Do with President Obama's Memo on Records Management? (Hint: Everything)	Jason R. Baron Director of Litigation, National Archives and Records Administration (NARA)
11:45 a.m. – 12:45 p.m.	Lunch and Vendor Discussions	
12:45 – 1:45 p.m.	How to Make Auto-Classification Transparent and Defensible	Stephen Ludlow Program Manager, OpenText
1:45 – 2:45 p.m.	Case Study #1: Managing Shared Content	Susan Sullivan Director, Corporate Records Management, NARA Tim Shinkle Gimmel Group
2:45 – 3:15 p.m.	Break	
3:15 – 4:15 p.m.	Case Study #2: Electronic Records Management and Auto-Classification at the Department of Energy	Speaker TBD
4:15 – 5:00 p.m.	Conclusion/Wrap-Up	Mark Mandel Records Management and ECM Solution Architect, OpenText

ABOUT OUR SPEAKERS



Jason R. Baron

Jason Baron has since 2000 served as Director of Litigation for the National Archives and Records Administration (NARA), and is an internationally recognized speaker and author on the preservation of electronic records. Formerly, he held the positions of trial attorney and senior counsel in the Department of Justice, Civil Division. In 2009 he was named Co-Chair of The Sedona Conference® Working Group on Electronic Document Retention and Production (WG1); he has served as an editor-in-chief on three Sedona Commentaries. He is a founding co-coordinator of the TREC (Text REtrieval Conference) Legal Track, and a founding co-organizer of the series of international “DESI” (Discovery of ESI) workshops devoted to search issues. Mr. Baron has been a Visiting Scholar at the University of British Columbia, and is currently an Adjunct Professor at the University of Maryland’s College of Information Studies. Among his many awards for public service, he received the Emmett Leahy Award for Outstanding Contributions and Accomplishments in the Records and Information Management Profession. He earned his BA, magna cum laude, from Wesleyan University and his JD from the Boston University School of Law.



Stephen Ludlow

Stephen Ludlow leads OpenText’s eDiscovery practice, which leverages the capabilities of the OpenText Suite of compliance applications to create solutions that reduce customers’ eDiscovery costs and risks. He is also responsible for bringing to market those eDiscovery applications that specifically address enterprise requirements to in-source eDiscovery activities. Previously, Mr. Ludlow managed OpenText’s Risk Management and Compliance application, working with Fortune 500 companies to deploy enterprise solutions for Internal Controls and Sarbanes-Oxley (SOX) compliance. Before joining OpenText, Stephen was an Information Management consultant focused on clients of the Canadian Federal Government.



Mark Mandel

Mark Mandel is the Partner Channel Business Development Manager for OpenText Public Sector Solutions and a 34-year veteran of the Enterprise Document Management and Records Management industry. He joined OpenText in 2011 after working as Chief Records Officer for the District of Columbia for 2 years. Presently serving as Chairman of the Board of ARMA NOVA, he is past president and current board member of the National Capitol Chapter of AIIM. Also an AIIM Fellow, Mr. Mandel served on the board of directors for AIIM International from 2007 – 2009.



Randolph A. Kahn, Esq.

Randolph Kahn is an internationally acclaimed speaker, consultant and award-winning author of dozens of published works, including: *Privacy Nation*, *Information Nation Warrior*, *Information Nation: Seven Keys to Information Management Compliance*, and *E-Mail Rules*. As founder and principal of Kahn Consulting Inc. He advises corporate counsels, information management and IT professionals in government and corporate institutions on policy issues related to managing digital information and electronic records. He is a recognized authority on the legal, compliance and policy issues of business information, electronic records, e-business processes and IT. Mr. Kahn received the Britt Literary Award in 2004 for his article “Records Management & Compliance: Making the Connection” and in 2005 for his article “Stand and Deliver.”



Tim Shinkle

Tim Shinkle is a Director at Gimmel Group, with 20 years experience in the IT industry and a background in computer science, specializing in information management. Previously, he ran a small services company, Perpetual Logic, focused on implementing content management solutions. Prior to that, he spent 2 years with EMC² Documentum, as their RM Industry Director and Director of Global Government Solutions, and 3 years as the CTO for the RM software company TrueArc. He was a participant in the first-ever DoD 5015.2 compliance testing. Mr. Shinkle’s work has been published in several IT trade magazines, and he has spoken at many AIIM, ARMA and technology conferences.



SPEAKERS continued



Susan J. Sullivan

Susan Sullivan, CRM, is the Corporate Records Management Program Director for the National Archives and Records Administration (NARA). A

Certified Records Manager (CRM), she has more than 25 years of experience in managing records and information. Since 2009, she has served as NARA's Records Officer, responsible for overseeing NARA's internal records management program. For 8 years, she was a member of the NARA ERM Policy Team in Modern Records Programs. Ms. Sullivan has since 2002 represented NARA on the PDF/A ISO standard committee. Prior to joining NARA, she worked as a records and information management consultant at several Federal agencies and in the nuclear power industry. She holds a bachelor of science degree in Business Administration.



Dr. William E. Underwood

Dr. William Underwood is a Principal Research Scientist with the Information Technology and Decision Support Division of the Georgia Tech Research

Institute, Atlanta. His research, sponsored by the National Archives and Records Administration (NARA), has involved prototyping of an archival repository and archival processing system for accession, arrangement, preservation, review, description and retrieval of electronic records. His current research interests are in developing formal, theoretical foundations for records management and archival science; experimental investigations of alternative digital preservation strategies; and the application of natural language processing, machine learning and knowledge-based reasoning technologies to the support of automated archival description, Freedom of Information Act (FOIA) review, and search and retrieval of records in digital archives. Dr. Underwood earned his PhD in Computer Science from the University of Maryland.

REGISTRATION

Register at www.armamar.org/nova
Cost includes continental breakfast and lunch
Registration limited to 95 participants

Pre-approved for 7 ICRM credits.

Early Registration (prior to February 20)

Members: \$125

Non-members: \$150

Full-time students: \$50

3 or more from the same
company/agency: \$75 each

Full Registration (after February 19)

Members: \$150

Non-members: \$175

Full-time students: \$50

3 or more from the same
company/agency: \$100 each

LOGISTICS

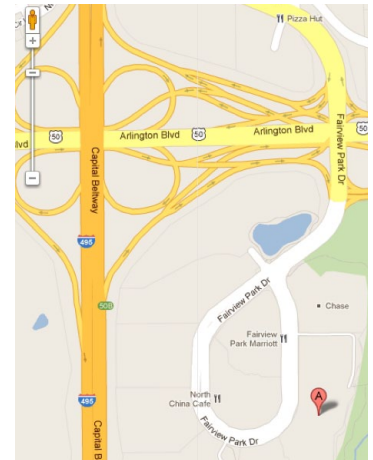
Date: Tuesday, March 6, 2012

Time: 8:00 a.m. – 5:00 p.m.

Place: CSC – Executive Briefing Center
3170 Fairview Park Drive, Falls Church, VA 22042
(go to <http://g.co/maps/mh7dw> for map and directions)

Parking: Free, covered parking adjacent to building

Metro: Dunn-Loring stop, plus a 10-minute cab ride



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