

ARMA NOVA Online Sessions of the Month
Available to all Chapter Members as a Chapter Benefit

ARMA International recently developed a partnership with RIM On-Demand to offer online education that is recorded from the Managing Electronic Records (MER) conference that is held in Chicago each May. The monthly sessions are provided to you FREE, in addition to our current monthly chapter meetings, as an extended benefit of your chapter membership. Each chapter member can access the online sessions at his or her own convenience.

To access:

- Visit www.arma.org
- Log into your “My ARMA” account
- Click on the link located next to your chapter membership

January 2012

Case Study: “Manage in Place” – Information Governance Strategy for Taming the Wild West

Over 80% of stored unstructured content (stored on shared drives, user hard drives, in SharePoint, and other locations) has no business value – nor legal need for retention. Yet, we have it - and the pile is growing. Migrating all of this content to a centralized repository is neither cost-effective nor practical.

This web seminar from the 2011 MER Conference details how leading organizations are taking a fresh look at their Information Governance strategies so they can take advantage of the cost and change management benefits of implementing an ongoing, proactive, “manage in-place” strategy that dramatically reduces the total volume of documents.

CUNA Mutual discusses the four contexts its Information Governance strategy has evolved:

- Managing unstructured information “in place” on shared drives and desktops
- Successfully cleaning up existing legacy documents in a legally defensible manner
- Enforcing ongoing Information Governance policies by using NextPage’s “Digital Thread” for tracking and acting on any file, stored in any location
- Capturing ‘records’ automatically and moving them to a central records repository for retention.

Take away a clear understanding of the benefits of “manage in place” and how this concept can significantly reduce unneeded unstructured data content (“stuff”) and thereby simplify the process of successfully managing electronic records.

Facilitators: Darren Lee and Teresa Drabenstadt

February 2012

Case Study: 3M Company's Enterprise Email and Records Management Solution – Reducing the ECM Landfill!

3M Company spent years searching for the right ECM, email, and e-discovery solution to accomplish the company's goals for compliance, as well as reducing discovery and IT costs. With 30,000 users who will eventually use the system, ensuring user acceptance and minimizing user disruption were critical requirements.

In this web seminar from the 2011 MER Conference, you will learn about the solution 3M selected.

The core concepts of 3M's solution are:

- Managing the retention of non-records "in place,"
- Reducing the volume of transient information that may create unnecessary risk and management cost
- Providing easy declaration and classification of email – for proper retention and control in an ECM system
- Enabling efficient e-discovery.

In this web seminar, you will learn how 3M's solution will enable:

- Email lifecycle management based upon the value of the email content
- Easy classification of email against the corporate records file plan
- Central management by an enterprise records management solution
- E-discovery improvements - both process and cost-reduction - through proper disposition of non-records
- Reduction of unnecessary content to be reviewed
- Improved IT operations and reduced storage costs.

Facilitator: Scott Burt

March 2012

Electronic Records Management Boot Camp

For those new to electronic records management or not sure where to start, this web seminar from the 2011 MER Conference provides an introduction to ERM. For seasoned practitioners, this web seminar provides a pulse check, providing "key consideration" checklists for electronic records initiatives for structured, "semi-structured" and structured data systems. It concludes with a risk-based approach for project prioritization.

This web seminar will help participants to:

- Develop a comprehensive view of their organization's systems and applications
- Categorize the systems and applications in a manner that facilitates comparison
- Develop an integrated framework of ERM initiatives.

This web seminar provides participants with an "ERM checklist" of topics including:

- Structured Data Systems: The discussion of structured data will focus on the suitability of information processing systems as "official" electronic recordkeeping systems.

This part also will also explore how to work and communicate collaboratively with IT.

- Unstructured and Semi-Structured Data Systems: Possibly the greatest challenge facing the RIM professional today is the management of unstructured data and documents stored on shared drives, in document management systems, in SharePoint and other collaborative tools, etc.

This part will focus on the records management governance requirements critical to managing this ever-growing volume of content.

- Messaging Systems: After 15+ years of struggling with email management, it is still the scourge of records management for many organizations. In addition to email, the management of instant messaging, text messaging, etc. will be discussed.

The web seminar concludes with considerations for developing a prioritized, strategic plan with the objective of comprehensive ERM throughout the organization.

Facilitator: Laurie A. Fischer, CRM

April 2012

The Imminent Demise of Records and Information Management - As We Know It

Major technology shifts are underway that will directly affect how and where business information is created, stored, accessed and communicated. This is being driven by:

- Improvements in bandwidth,
- Web 2.0,
- Increasing user sophistication and,
- Growing ubiquity of access points.

Collectively, they are converging to make new information environments, such as Cloud Computing and Social Networking, practical and cost compelling.

The increasingly rapid adoption of Cloud Computing and Social Networking is based on:

- Enticing cost benefits,
- Radically enhanced information availability, and
- Collaboration.

For RIM managers, Cloud Computing and Social Networking are more than just new technologies: they are the forbearers of a sea change in the way records and information will be managed.

Specifically, traditional information controls, predicated on being located within the protective wall of the organization, are being either eliminated completely or thrust outside of the flexible restraints of the organization.

The primary focus of this web seminar from the 2010 MER Confernece is on breaking down the emerging information management issues brought by this new paradigm and addressing their short term and long term solutions. The web seminar shows the resulting need for a major shift in the way organizations think about managing their information assets.

This web seminar also includes case studies of how companies are using these new technologies to:

- Reduce costs;
- Make information more available to their employees; as well as
- Broaden client, partner, and supplier relationships.

Participants will learn how to manage their information in these new environments. This will include:

Establishing consistent and effective controls over email, SharePoint and MS Office documents in the Cloud,
Implementing controls over their intellectual property when using Social Networking,
Developing internal information handling standards and conventions to enable automated information management technologies and techniques to be more effectively applied

May 2012

Enterprise Content Management, Information Governance and the Future of RM

Enterprise Content Management (ECM) has evolved over the past few years to become more than a glorified document management system. Many organizations see ECM as a holistic, enterprise-class management solution capable of integrating a wide variety of information types. A number of governance as well as risk and compliance (GRC) related issues also are driving corporate users toward ECM. They include including information integrity, process integrity, controlled access, and information retention requirements. ECM has become a means to limit the access and distribution of proprietary and private information outside the organization – thereby helping to ease security concerns. ECM also is seen as playing a key role in automating governance practices through the use of content analytics and other advances that will have implications for the future of Records and Information Management (RIM).

In this web seminar from the 2011 MER Conference, you will learn:

- The business issues involved in information governance, risk and compliance,
- How ECM has evolved to include tools that have significantly contributed to moving information governance initiatives forward in many organizations, and
- The future direction of ECM and its impact on managing electronic records.

Facilitator: Julie Gable, CRM, FAI, CDAI

June 2012

Guide to Managing Content Generated by Social Media Tools as Records

Many organizations have moved beyond experimenting with social media tools to incorporating them into business processes. As a result, both commercial services and enterprise social content tools are significantly changing the ways organizations do business and interact with their constituents. As the amount of content generated by these tools increases, so does the need to manage them successfully.

This web seminar from the 2011 MER Conference describes specific steps that organizations need to take to manage their social media content as part of their established RIM program. The objective of this web seminar is to provide a practical, action-oriented approach to managing social media content as records.

This web seminar provides attendees:

- An up-to-date understanding of the current state of the social media market
- Common use examples of how social media tools are increasingly used in business and government
- The legal and operational challenges that social media tools present to organizations, especially in the areas of privacy, productivity, and preservation
- A comparative analysis between legacy content creation tools and social media tools
- The emerging social media tools: custom social networks, location-based services, social media platforms, and analytics
- The specific steps necessary to declare and manage social media content as integral component of an

established RIM program.

This web seminar provides a core foundation for both understanding and taking professional leadership in addressing the management of social technologies - what promises to be one of the most significant legal and operational challenges that social media tools present to organizations, particularly in the areas of privacy, productivity, and preservation of electronic records over time.

Facilitator: Mr. Jesse Wilkins, CRM, CDIA+, CDIA

July 2012

Case Study: Records Management Embedded into Business-as-Usual Operations

Discover how Discount Tire Company leveraged its culture and implemented an enviable business-as-usual (BAU) records management program that most organizations only dream of. They started with an Inviting, Easy & Safe culture that focused on what they do best – taking care of people, and asked "What is records management?" ECRM now is deployed in several business units, and employees are discovering value in the program beyond just "managing" their records! Going from zero to 100 and bypassing detours is challenging for any organization.

In this web seminar from the 2011 MER Conference you will discover how Discount Tire transformed its RM practices by fully deploying ECRM.

Learn how Discount Tire:

1. Gained and held senior management support.
2. Built a solid records management program that was designed to win with an ECRM solution that fully manages unstructured content.
3. Employed effective change management to replace reluctance and "fear of change" with competitive enthusiasm, streamlined business processes, and embedded records management principles.
4. Deployed an effective ECRM solution to fully manage its unstructured file share and email content and reduced current and future costs of managing electronic content.
5. Exploited each individual's natural competitive spirit by tracking key metrics (volume, percent completion, etc.) and comparing individual and department-wide performance.
6. Sustained momentum through internal forums, sharing tips amongst power users, measuring and monitoring progress, and keeping the competitive spirit alive.
7. Integrated a continuous improvement loop into the Records Management Program.

This web seminar focuses on the practical actions of Discount Tire to implement an effective records management program – with an ECRM solution – which hooked the organization on the benefits of fully-managed information and transformed their organizations records management practices!

Facilitators: Angela Amrine, Carol A. Stainbrook

August 2012

Separating Fact from Fear: What the "Spoliation" Cases Really Mean

During 2010, several federal courts issued lengthy, detailed opinions in which parties were severely sanctioned for failures to preserve data subject to discovery in civil litigation – one party was briefly threatened with jail. At the same time, other courts have pulled back on sanctions. The opinions demonstrate that this is a very complex and confusing area of law, breeding uncertainty and fear for

organizations that do business across the country and may be held to conflicting standards.

This web seminar from the 2011 MER Conference analyses the legal contradictions apparent in the case law and focuses on the common elements on which organizations can reliably base their data preservation decisions and avoid spoliation sanctions.

Specifically, this web seminar explores:

- The landmark Pension Committee, Rimkus, and Victor Stanley decisions
- The anticlimactic Qualcomm and Philip Adams decisions
- How judges hear dogs that can't bark, and how juries decide if those dogs can still bite
- Orbit One and the paradox of proportionality
- "Cost benefit" versus "risk management" in making preservation decisions
- How to absolutely, positively, avoid spoliation charges (some of the time)
- How to minimize the danger of spoliation sanctions (the rest of the time).

Facilitator: Kenneth Withers