ARMA INTERNATIONAL® CENTRAL NEW YORK CHAPTER

ALBANY-BINGHAMTON-SYRACUSE

CNY ARMA Newsletter February 2011

PRESIDENT'S MESSAGE

I recently applied for life insurance. In order to assess its risk and determine a fair premium, the insurance company wanted to know everything about me: my personal habits, my financial stability, my medical history, my family's medical history, and my driving record. What are the insurance company's policies and procedures for safeguarding all these very personal and private data? Or do they even have them?

Not a week passes when I don't read a story in a newspaper, magazine or journal about a data breach. A hacker breaks into a database and steals thousands of credit card numbers, a rouge employee walks out the corporate door with a laptop full of trade secrets, a government employee is caught accessing the private data of political opponents.

Data privacy and security responsibilities often include records and information managers. It is a topic all RIM professionals need to become better acquainted with. On April 5, 2011 please join us at National Grid in Syracuse for a case study in data privacy. National Grid representatives will explain how they devised and implemented data privacy policies and procedures.

If you're interested, the Federal Trade Commission recently issued a lengthy draft report on the subject, *Protecting Consumer Privacy in an Era of Rapid Change*: *A Proposed Framework for Businesses and Policymakers,* available at

Quick Links

Central New York ARMA

ARMA International

ARMA Northeast Region

ICRM

AIIM

http://www.ftc.gov/os/2010/12/101201privacyreport.pdf

Dave Lowry
Chapter President

Data Privacy and The Rules: A Case Study

April 5, 2011. National Grid. Syracuse, NY.

Increases in identity thefts and other data breaches have resulted in new laws such as the Massachusetts 201 CMR 17.00 Standards and HIPAA (HITECH ACT). A Company's reputation is a key motivator in protecting customer data. Privacy is becoming more complex and international in nature. As a result, companies are presented with both internal and external privacy and security challenges. Please join us to hear how one company tackled this challange.

Topics of discussion include:
- Data Privacy and the Rules
- How Data Privacy came into existence
- Why we need Data Privacy
- What we need to do to comply with the Data Privacy Rules

About the Speaker:

Teddy Redmond works as a Lead Systems Analyst for the Legal and IRM Departments at National Grid in Hicksville, New York. Teddy began his employment in 1998 working in the IS Department of National Grid's predecessor, the Long Island Lighting Company. In 2000, Teddy came to the Legal Department becoming the liaison between IS and Legal for the department's technical needs. These technical needs include software evaluation and testing, assistance with our e-discovery requests, project planning and training.

WHEN: APRIL 5, 2011
     REGISTRATION: 11:30AM
     LUNCH: 12:00PM
     PRESENTATION: 1:00pm-2:30pm

WHERE: NATIONAL GRID
     300 ERIE BLVD. WEST
     SYRACUSE, NY 13202

HOW TO REGISTER: CONTACT JACKIE LEWIS
     (315) 574-7525
     jlewis@herkimerarc.org

COST: $25, MEMBERS
     $30, NON-MEMBERS
     $15, STUDENTS

This event proudly sponsored by:

national**grid**
The power of action.

DIRECTIONS TO NATIONAL GRID OFFICES:

From Interstate 90 (NYS Thruway):
- · Take Exit 36 (I-81)
- · Merge onto I-81 South
- · Follow the instructions from Interstate 81 below

From Interstate 81 (From North):
- · Take Exit 20 (Franklin St.)
- · Merge onto Franklin Street and get into center lane. Go under overpass.
- · Turn right onto Genesee Street at second light after underpass, get in left lane.
- · National Grid complex entrance will be on your left at the light.

Alternate Route From Interstate 90 West of Syracuse:
- · Take Exit 39 (I-690)
- · Merge onto I-690 E toward Syracuse (9 miles)
- · Take W. Genesee St exit (exit 12)
- · Turn left onto W Genesee Street
- · National Grid complex entrance will be the first right (at the light).

Parking will be across the street in the pay lot.

Chapter Sessions of the Month

ARMA International has added another benefit to chapter membership: The Chapter Session of the Month Program. The program is a joint venture between ARMA and RIM On-Demand. This year's session selections come from the Managing Electronic Records (MER) conference. We've selected for February, *Content in the Cloud - Opportunity or New Risk for Records Managers?* Chapter members can access this online presentation by logging into My ARMA on the ARMA website and under chapter memberships will be a link to the session. The session will address:
- What are the "drivers" behind the shift to the cloud
- Why content management in the cloud has unique advantages vs. traditional approaches
- What are the strategic implications - for cloud records management and today's records managers.

This session then defines differing approaches for using cloud based records management and the advantages and disadvantages of each.

Finally a case is presented for how managing content in the cloud may be actually a safer and more effective records management strategy for certain types of organizations - both for records management and e-discovery.

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CRM Corner

Winter 2011 Exam Schedule

Registration Open:
November 19, 2010 - February 3, 2011

Exam Dates:
Parts 1-5: February 7-11
Part 6: February 6

Spring 2011 Exam Schedule

Registation Open:
February 25 - April 28

Exam Dates
Parts 1-5: May 2-6
Part 6: May 5

Summer 2011 Exam Schedule

The CNY ARMA Board hopes you enjoy this great educational opportunity.

CNY ARMA AWARDS

Recruitment Award

We're pleased to announce that Central New York ARMA won the Chapter Membership Recruitment Award for 2009-2010. A certificate was presented to the chapter at the 2010 ARMA International Conference and Expo in San Francisco, CA. Over the 2009 -2010 time period chapter membership increased by 30%! Thanks to all our new members who made this award possible.

Chapter Member of the Year

The Central New York Chapter of ARMA International has voted Dave Lowry of the State Archives as the 2010 Chapter Member of the Year. ARMA International is a not-for-profit professional association and the authority on managing records and information. The Central New York Chapter encompasses the Albany-Binghamton-Syracuse area. Dave serves as chapter president and during his tenure chapter membership increased over 30%, a new improved website was launched, a presence on FaceBook was established and educational offerings were increased.

2010 ARMA International Conference: An Attendee's Perspective

By Jackie Lewis, CNY ARMA Treasurer

With the support of the CNY Chapter and my employer, Herkimer ARC, I had the privilege of attending the ARMA 2010 conference and expo in San Francisco in November. In the welcome message of the conference handbook, Marilyn Bier, Executive Director of ARMA International stated, "The Annual Conference & Expo is the one event where you will catch up on the latest technology trends, network with colleagues in the information management profession, meet face-to-face with leading technology vendors, and gain new insights at our education sessions." "Wow," I thought - those are some pretty lofty statements - but I found that is exactly what ARMA delivered!

The conference offered so much that at times I found it difficult to choose what to attend and what I would have to forego. Fortunately, I think the conference committee responsible for organizing the event may have realized that this could be a dilemma for many, so as part of the conference

Registration Open:
May 20 - July 28

Exam Dates
Parts 1-5: August 1-5
Part 6: August 6

Fall 2011 Exam Schedule

Registration Open:
August 19 - November 3

Exam Dates:
Parts 1-5: November 7-11
Part 6: November 6

Study Group Wiki

The San Antonio chapter has a wiki that mainly serves as a convenient place to collect and display study notes from the previous CRM study sessions. It is open to all and free of charge. Create an account at www.icrmstudygroupsa.wikis aces.com Your feedback on this site is always welcomed.

**UPCOMING ANNUAL CONFERENCES
&
EXPO**

**October 17 - 19, 2011
Washington, D.C.**

**Sept. 23 - 26, 2012
Chicago, IL**

Northeast Regional Leadership Training

**May 18 - 20, 2011
Foxwood Casino
Mashantucket, CT**

Metro NY ARMA

registration fee, attendees are able to view web seminar versions of some of the educational sessions they might have missed, from the comfort of their home or office by logging onto the "My Education" member section of the ARMA website.

Technology, technology, technology....that was the focus of this conference. Not only were educational sessions, vendors, and network sessions designed to focus on technology, but ARMA HQ staff demonstrated the power of technology live throughout the conference by keeping everyone "posted" on the happenings of the conference in real time via social media applications such as Twitter, Facebook, and Linkedin.
In addition, at the conference ARMA announced their partnership with MER (2010 Managing Electronic Records Conference) and RIM On Demand to allow ARMA members the opportunity to view sessions from that conference monthly via the web.
Some of the highlights of the conference for me were:

- The opening session was filled to near capacity and kicked off the official start of the conference with a thought-provoking and sometimes controversial panel discussion by industry experts in a discussion titled, "Information Governance: Technology in the Spotlight. "
- The vendor showcase floor was packed with not only vendor booths, but Industry Intelligence Sessions where attendees could learn about trends and how they impact professional decisions, Solutions Showcases where product demos and solutions were presented by industry leaders, Roundtable Discussions focused on various industries, and Poster Sessions. I was proud to see our own Dr. Pat Franks (Associate Professor, School of Library and Information Science, San Jose State University) in attendance on the vendor floor speaking to attendees about educational opportunities at San Jose State as well as her comprehensive report for the IBM Center for The Business of Government titled, "How Federal Agencies Can Effectively Manage Records Created Using New Social Media Tools." http://www.businessofgovernment.org/report/how-federal-agencies-can-effectively-manage-records-created-using-new-social-media-tools
- Another major focus of the conference this year was GARP® (Generally Accepted Recordkeeping Principles). Many opportunities were provided for attendees to learn more about GARP® and how RIM professionals can apply the GARP® Maturity Model

to identify RIM goals and measure their progress towards developing a highly successful information governance program.

- There were many networking opportunities from industry specific groups to region groups, to groups for young professionals and first time conference attendees, to general gatherings where you could meet others in RIM and associated professions.
- The education sessions were top notch and were organized into domains so that attendees could choose sessions they needed to improve their knowledge in their core competencies.
- The leadership sessions provided as part of Region and Chapter Leadership Day gave me, as a chapter leader, some great public relations strategies and tactics to help make our chapter more successful.

You can definitely see how ARMA lived up to their goals and presented a conference full of cutting edge educational sessions, vendor presentations, and networking opportunities, all in the beautiful setting of downtown San Francisco. There were two main messages I came away with. One - while RIM is changing, it is alive and well! Leading me to number two... There are many exciting possibilities ahead to incorporate technology into our everyday work lives to improve workflow and productivity at our companies. To do this, we must partner with others, particularly in IT, and we must do so with much forethought in the planning and implementation process in order to clearly understand the risks that come along with the increased availability of technology storage solutions so that we can inform our organizational leaders of the risks as well as compliance and discovery concerns that are not always thought of as they pertain to records management.

By taking advantage of the excellent opportunities afforded to us by being members of ARMA International, our local chapters and sharing with other chapters in our regions, we will be better equipped to do just that.
I thank the CNY Chapter and the Herkimer ARC for giving me the opportunity to attend this conference and I encourage all ARMA members to take advantage of the educational and networking opportunities available to you at upcoming chapter meetings, the region leadership conference/CT spring seminar, and if possible, the 2011 ARMA conference in Washington, D.C. It is truly an exciting time for RIM professionals!

New ANSI/ARMA Standard 18-2011

central control for filing all documents and for their timely disposition, including the destruction of electronic documents.
2. The software tools for everyone in an organization to **file their own e-records** of every type for immediate access by all authorized personnel. At the same time giving the Records Manager the ability to create and assign virtual folders and to audit all filing.
3. The management of the entire **life cycle of paper records s**tarting with accessioning of boxes for semi-active storage or as early as the creation of folder labels for active records. Controlling workflow and statistics related to storage, retrieval and tracking.

The presentation is available to the general public on the SJSU website as a MARA Webcast, which requires the use of QuickTime. Another copy of the presentation available on the Eloquent Systems website uses Flash Player. Full screen viewing with the Eloquent Webcast provides better detail on reports and screenshots.

About SJSU SLAIS
The School of Library and Information Science at San José State University is the largest accredited library and information science program in the world. The office is located on the San José State University campus. By means of their online program they serve students throughout the entire state of California as well as other states and nations.

About Eloquent Systems Inc Eloquent Systems is a privately owned developer of Web-based knowledge

Implications of Web-based, Collaborative Technologies in Records Management: An American National Standard

On January 13, 2011, ANSI/ARMA 18-2011, *Implications of Web-Based Collaborative Technologies in Records Management*, was approved as an American National Standard.

A team of professionals from government, education, and the private sector *lead by Pat Franks, CNYARMA Board Member*, developed this standard to provide guidance to records and information management professionals charged with applying records management practices to the use of internally-facing or externally directed (public or private), web-based, collaborative technologies, such as wikis, blogs, mashups, and classification (tagging) sites. Adherence to Generally Accepted Recordkeeping Principles® (GARP®) is also supported and encouraged by advice contained within this publication.

While the decision to incorporate these technologies into the day-to-day practice of records and information management directly impacts records professionals, for optimal results cooperation is needed from individuals in other functional areas within the organization, including (but not limited to) human resources, information technology, legal, and marketing. Therefore, this standard will be of use to not only records managers but also all individuals involved in creating or managing records and information through the use of web-based, collaborative technologies.

The PDF version of this standard is now available through the ARMA International bookstore. Print versions will be available within a few weeks.

Two-Pay Plan Option for Annual Dues

In these tough financial times, ARMA International has instituted a new payment option, which eases the burden of paying your annual dues in one payment

This is the way it works:

1. ARMA will include a form with the annual dues invoice for members to complete if they would like to pay their dues in two equal payments.
2. The two-pay plan requires the dues be paid with a credit card (Visa, MasterCard, American Express, or Discover) or a debit card with the Visa or MasterCard logo.
3. Members must provide their card information and sign an agreement allowing ARMA to process payment for half of their dues upon receipt of the form and the other half six months later. A $5.00 processing fee will be added to each payment. We will keep this form on file.
4. ARMA will send a reminder notice to those individuals participating approximately one month prior to processing the payment for the second half of their dues.

management applications. **Eloquent Records™** is one of 4 applications in the **Eloquent WebSuite** which is built around the powerful **WebGENCAT™** search engine. Customers often start with a single application and, as they grow into the system, add other applications by simply installing a new license key. The software can be purchased for installation on any Windows server or used as a service (SaaS).

For further information contact Merv Richter at 800-663-8172/101 or merv@eloquent-systems.com

5. The chapter dues will also be paid in two payments. Chapters will receive their chapter escrow payment as it is paid to ARMA - 50% upon the renewal and 50% six months later for members who opt for the two-pay plan.

6. ARMA cannot accept checks with this plan. The credit card information on file provides somewhat of a guarantee that the second half of the membership payment will be made - a guarantee that is not available with check payments.

CRM Certification: What's on the Horizon

Rae Lynn Haliday, CRM, MBA
ICRM Regent for Public Relations
and Professional Development

The Institute of Certified Records Managers (ICRM), an international certifying body of and for professional records managers, began the process of issuing the CRM designation in 1975.   Thirty-five (35) years later, the organization and the credential remains a valuable part of the Records and Information Management (RIM) community; an expanding interdisciplinary, global and diverse constituency.

The ICRM has recently completed an ambitious Strategic Business Plan, and will publish a Press Release in the near future which identifies several large initiatives. For a high-level summary, the multi-year Plan will provide for a thorough evaluation of certification standards, the Institute's current business model, formalization of its examination preparation program, and an extensive marketing plan that will support growth, awareness and a strong, globally recognized value proposition for being a Certified Records Manager (CRM).

As part of the development of the Plan, a thorough assessment of the changing business landscape was completed, as well as a forward thinking commitment to our long-term relationships with strategic partners within the RIM community. The resulting strategy provides a strong foundation for business success that underscores the ICRM mission and vision, and provides for the advancement of the Certified Records Manager (CRM).

Mission: To certify RIM professionals as Certified Records Managers ® (CRM) and administer a certification maintenance program.

Vision: The Institute of Certified Records Managers ® (ICRM) is the certifying body for Records and Information Management (RIM) professionals, recognized and valued by employers and RIM practitioners world-wide.

For more information on the CRM designation, please contact the ICRM at (877) 244-3128. For PR and Marketing contact Rae Lynn Haliday, CRM, MBA, at (314) 646-4572 or by email at haliday@stlzoo.org.

For the 2011 schedule of examinations please see the *CRM Corner* in the column on the right.