

# ARMail

Central New York

Vol. 12 No. 5

May 2003

## Fire protection finds a home

by Paul G. Schneider, Jr.



### Abstract

Caretakers of the Lorenzo State Historic Site near Syracuse, New York, have made fire safety a top priority at the mansion. The former estate of early land speculator John Lincklaen, built in 1807, is listed on the National Register of Historic Places and hosts thousands of visitors each year. Direct supervision of fire safety and security is handled by the New York Office of Parks, Recreation and Historic Preservation's Bureau of Historic Sites.

The mansion boasts a fully integrated computerized system featuring automatic fire suppression, electronic intrusion and fire detection, closed-circuit television and access control.

To see the full version of this article, please go to:

<http://www.securitymanagement.com/library/001428.html>

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Paul G. Schneider, Jr., is a museum security specialist for the New York State Office of Parks, Recreation and Historic Preservation's Bureau of Historic Sites. He also serves on the National Fire Protection Association's Technical Committee on Cultural Resources. He is a member of ASIS.

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*Message from the President  
Eileen Keating*

## Are You Creating History?

I always get excited about visiting a museum, a historical site, anything to do with history. That probably explains why I enjoy working in the Division of Rare and Manuscript Collections at Cornell, which has thousands of rare treasures, from the Gettysburg Address, to the original manuscripts of E.B. White's *Charlotte's Web* and James Joyce's *Ulysses*. As the university records manager, a great part of what I do is to ensure that the history of the university is being documented, preserved, saved! This is where my love of history gets to be realized in my job

I often have to remind people at Cornell — and that includes faculty, staff and sometimes students — that they are in fact creating history and that they should consider saving the work that they are doing. As I mentioned in my last column, so much history is being created in digital format and the Cornell Archives at this moment takes material only in hard copy, so the message of preserving history often has to be drilled into people. In our fast-paced world, we are often so present-minded and task oriented, that we don't step back to see the big picture. Do we realize that the work we are doing does have value to the institution for which we work? Even if you are working for a corporation that does not have an archives, you might want to make the argument with your CEO or Director, that a comprehensive records management program includes dealing with the historical records. If you do not have the room or people to have an archival program, perhaps there is a local historical repository that would be glad to work with you in establishing the transfer of your records. Our chapter of ARMA, for instance, will be using Syracuse University as our repository.

Our next ARMA meeting is going to be at the Lorenzo House in Cazenovia. We will be going on a guided tour, and if

you think about it, this would not be possible if the former owners of this mansion did not have the foresight to preserve their records. I guess my cry for this column is to consider your own job and what you do. Is there a historical aspect to your work that should be preserved and, if so, are all the steps being taken to maintain that historical record? You might want to consider this.

It is at our June meeting that we induct our officers and board members for next year. Our board will be smaller this year, so I am encouraging all ARMA members to participate more and consider joining the board. You are encouraged to attend our board meetings (they proceed the regular meetings and begin at 10:30 a.m.) and see what it is we do.

I am looking forward to June 11th, because although I have lived in New York all my life, I have never been to the Lorenzo House or Cazenovia for that matter. I will see you there!

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**Meeting in Review**  
**April 2, 2003**  
**Holiday Inn, Cortland**

by Patricia C. Franks

## Electronic Document Management

The Spring meeting of the Central New York ARMA Chapter was held April 2, 2003, at the Holiday Inn, Cortland, NY. The meeting was followed by an informative presentation, *Electronic Document Management Systems: Defining, implementing, justifying, and lessons learned.*

**Suzanne S. Etherington**, Ph.D., C.A., Regional Advisory Officer for the New York State Archives, and **Steve Goodfellow**, President of Access Systems Consulting, presented the audience with a realistic and unbiased approach for EDMS solutions covering such topics as:

- Understanding the concept and terms
- How a system works
- When to consider a system
- Important features to consider
- How to justify a system
- Implementing a system
- Records Management components
- Understanding the “gotchas”

Suzanne set the stage — what document management systems are, when they should be considered, and explaining the functions and components. Steve emphasized the need for a workflow analysis and cost justification.

### When Should You Consider an EDMS?

According to Suzanne, Electronic Document Management Systems are for all e-documents. Recently AIIM has begun to promote the term “Enterprise Content Management” to include EDMS and dynamic Intranet/Internet site content management. If you can answer “yes” to any of the following questions, it’s time to consider EDMS:

- Is document retrieval speed an issue?
- Do you need more control over your documents?
- Would you like to improve efficiency?
- Do you need to improve customer service?
- Would you like to reduce space used for active and semi-active documents?

### Functions & Components of an EDMS

EDMS can help you analyze and improve efficiency in relation to the following functions: capture, index, store, process, retrieve, revise, secure, distribute, and dispose.

Capture can be achieved within EDMS by scanning, storing existing electronic files, capturing computer-generated reports via COLD (Computer Output to Laser Disc) and ERM (Enterprise Report Management), and the use of e-Forms (online data capture and processing).

Indexing can reduce manual keying time and errors if existing electronic indexes are used. Barcoding and OCR/ICR technologies can be used as part of the EDMS. Be sure to keep the index manageable (3-5 indices).

Storage within an EDMS can be accomplished on magnetic devices such as hard drives and optical disks (like CD-Rom, CD-RW, WORM, and DVD).

EDMS improves document handling by exploiting parallelism during the workflow process. EDMS makes it possible to monitor and control the status of work in progress through the use of audit trails, alarms, and automated work balancing. Modeling using “what-if” design assistance is possible.

Retrieval within an EDMS involves searching across libraries or volumes (sometimes called a repository), searching by document or file profiles, and full-text searching.

Within an EDMS, revision can take place through forms recognition and removal, document annotations (sticky notes), and version control.

Security can be enhanced by providing access through the right controls at all of the following levels: library, folder, document, and page. Redaction (white or black-out of sensitive information) is also a feature included in an EDMS.

Distribution takes place through output (printing and/or faxing) and docu-

ment check in and check out.

Disposition within an EDMS involves identifying retention periods (including an online retention schedule), automating disposition, destroying obsolete records, integrating a records management application (RMA), and following standards developed by the Defense Department (DoD 5015.2-STD).

It’s also important to understand that EDMS does not:

- Preserve information
- Ensure accuracy of document content
- Migrate electronic data

### Wondering Where to Begin?

If you’re wondering where to begin, Steve provided the following suggestions:

- Clearly define the issues — what is driving the change?
- Perform a Business Process Analysis — identify bottlenecks, define the current cost structure
- Re-design the process — with the ultimate business goal in mind
- Identify technological solutions
- Design initial system design
- Develop an RFP (Request for Proposals)
- Vendor evaluation & selection
- Project implementation planning (identify tasks, durations & resources, develop communications plan)
- Solution installation & support

### What’s the Payoff?

EDMS can result in some hard dollar savings including savings due to faster retrieval time, decrease in microfilm/microfiche costs, fewer computer reports generated, lower distribution costs, decrease in needed storage space, and need for fewer supplies. In many cases, soft dollar savings will bring even greater value to the organization by improving customer service, workflow efficiency, auditing productivity, disaster recovery, employee morale, and keeping files up to date.

*Continued on page 4*

**CRM**  
**RECORDS**

by Holly Murphy, CRM

Spring is here, finally! Well at least today who can say about next week. Unfortunately that is how employment is now a days. Employment and the finding of jobs in our chapter area is in difficult times. I can't promise that having a CRM will help, but developing any new skills can't help but make one a more employable candidate. While you think about it, take the following CRM quiz. If you are interested in sitting for the exams check their web site at [www.icrm.org](http://www.icrm.org).

**Part 1 Management Principles and The Records & Information Management Program**

1. Which of the following is normally not the responsibility of a records center clerk?
  - a. Check in records for inactive storage.
  - b. Decide when records are no longer necessary and may be destroyed.
  - c. Maintain reference and control forms.
  - d. Prepare documents for microfilming.
  - e. Operate shredding machine.

**Part 2 Records Creation and Use**

2. A reports inventory conducted for the purpose of developing a reports standardization program should include:
  - a. One-time reports.
  - b. Payroll reports.
  - c. Progress reports.
  - d. Audit reports.
  - e. One of the above.

**Part 3 Records Systems, Storage and Retrieval**

3. The records transfer list should contain:
  - a. Each records series title.
  - b. Departmental name.
  - c. Each folder title.


- d. All of the above.
- e. A and b above.

**Part 4 Records Appraisal, Retention, Protection and Disposition**

4. Archives established to preserve the history of an institution, a corporation, or a family is a:
  - a. Public Archives.
  - b. Private Archives.
  - c. General Archives.
  - d. Manuscript collection.
  - e. None of the above.

**Part 5 Facilities, Equipment, Supplies and Technology**

5. Reader-printers are available for:
  - a. Aperture cards.
  - b. Microfiche.
  - c. Roll film.
  - d. All of the above.
  - e. b and c above.

 *Answers on page 5*

**TREASURER'S REPORT**

Submitted by Edward L. Galvin, Treasurer  
April 29, 2003

Balance as of 2/26/03 ..... \$1,945.45

INCOME:

April Meeting Revenue ..... 335.00  
Dividends - February and March ..... .04  
Escrow Checks ..... 175.00  
**Total Income ..... \$510.04**

EXPENSES:

Impress Publications, January Newsletter ..... 408.72  
Impress Publications, March Newsletter ..... 331.81  
April Meeting Expenses ..... 363.69  
Impress Publications, Ballot ..... 73.55  
Stamps and Envelopes for Treasurer ..... 9.10  
Account Maintenance Fee Feb. and March ... 10.00  
June Meeting - prepayment for Lorenzo ..... 100.00  
Donation - Herkimer Co. Veteran's Celebration Day ... 25.00  
**Total Expenses ..... \$1,321.87**

Balance as of 4/29/03 ..... \$1,133.62

**Meeting in Review**

*Continued from page 3*

**Closing Thoughts**

Suzanne and Steve left the group with the following cautions:

- Keep your initial analysis independent of technology or vendors
- Project management is important
- Don't overlook basic records management principles.
- Do your preliminary justification up front.

The presentation was followed by a very lively question and answer session. Suzanne and Steve provided the audience with a thorough overview of Electronic Document Management Systems and concrete suggestions that could be used by those interested in exploring the implementation of EDMS in their own organization. Many thanks to both Suzanne and Steve for delivering an extremely informative educational program enjoyed by all.



**CNY Wedding Announcements**

March 30, 2003

*Halbritter/  
MacLeod*

Susan Diane MacLeod and Robert Bruce Halbritter were married March 3 on a boat off Little Palm Island in the Florida Keys. Officiating was Sandy Sledge, notary public and general manager of Parmer's Resort on Little Torch Key.

Mark and Sheri Halbritter, son and daughter-in-law of the groom, were witnesses.

A toast, dance and cake-cutting followed the ceremony on the boat. A dinner followed in the courtyard of Fin's Restaurant on Summerland Key.

The groom is owner of the North Shore Family of Firms, including the North Shore Taxidermy Studio.

They live in Williamstown.

**2003-2004 CNY ARMA Election**

- President Eileen Keating, Cornell University
- Vice President Patricia Franks, Broome Community College
- Treasurer Ed Galvin, Syracuse University
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  - JD Albro, Syracuse Office Environments
  - Suzanne Etherington, NYS Archives & Records Administration
  - Steve Goodfellow, Access Systems, Inc.
  - Dave Langevin, Iron Mountain Records Mgmt.
  - Jackie Lewis, Herkimer Area Resource Center

**Join us at the June 11th meeting to find out who will receive this year's Chapter Member of the Year Award!**

**State Archives**

**Workshops to be announced on web site**

Since budget restrictions have forced us to suspend publication of the State Archives' workshop catalog and the newsletter, *In the Field*, we will use this listserv to notify you when new workshop offerings or publications are available on our website.

Local government and state agency workshops scheduled through September 30 are now available at <http://www.archives.nysed.gov>. Click on "Services," click on "Training," and then select "Local government and state agency workshops." You may search by topic, region, or date. These workshops are free of charge, so register today the quick and easy way — online!

**Disclaimer Notice**

ARMAil is published at least five times during the fiscal year. Readership includes members of the Central New York Chapter of ARMA International, as well as interested records and information management professionals in the central New York area. The information contained in this newsletter does not necessarily reflect the views of the membership or the editor, nor is there any endorsement of advertisements or published seminar information. This newsletter is offered only as a source of information.

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Deadline for next issue:  
July 29, 2003



Printed on recycled paper.  
Design & production by  
Impress Publications, (828) 697-5143;  
Toll-free: 1-800-613-0063 code 00;  
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**Member in the News**



Suzanne Etherington of Cortland, a member of the Central New York Horse Club, is shown here with her horse, Jay, 6-year-old Quarterhorse gelding.

Suzanne Etherington was pictured in the Cortland paper recently in a promotion of the Central New York Horse Club's Community Horse Fair.

**answers to  
CRM questions  
on page 4**

- 1.b.
- 2.c.
- 3.e.
- 4.b.
- 5.d.



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