



NOVEMBER/DECEMBER 2003

# ARMAWAUKEE

## Driving Home the Cost of Clutter

By Karen Payne

Paper is the biggest source of clutter. Even with e-mail and digital storage, the volume of paper has increased 100% since 1995. 90% of information is still on paper, but we use only 20% of the paper we keep (another instance of the 80/20 rule). In U.S. offices, paper consumption jumped 12% between 1995 and 2000, even while computer usage was increasing by 5%. That's because humans prefer to read information on paper, even with advances in the quality of computer monitor displays in recent years; and we continue to print out e-mail attachments.

U.S. business spend more than \$25 billion a year filing, storing, and retrieving paper documents. The challenge to keep up with ever-mounting piles of paper has worsened by the evolution of decentralized filing systems. Most organizations can no longer afford the luxury of having a trained professional devoted to filing. The filing responsibility has become diffused in organizations, and most people put it way down the list of priority tasks. It's a dull job, so there's

little desire to do it. File cabinets are jam-packed, so there's not even a place to easily do the task of filing. With added workloads and increased downsizing, no one feels like they have the time to file.

With filing being performed at all levels in an organization, there are naturally inconsistencies in filing and retrieval methods. Everyone may have their own method of filing...but what if they leave the company, or are out for an extended period or even for an afternoon when critical documents can't be found? Others needing access to common files can't find information when only the absent employee knows the filing process.

### Beating the Battle of the (Paper) Bulge

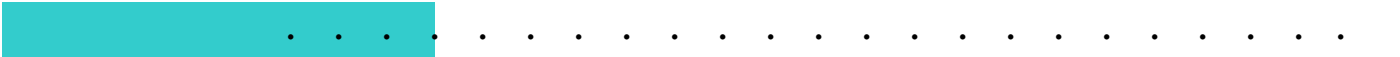
To wage war on burgeoning piles of paper, consider this suggestion: take a hard look at the need to keep or filing responsibility has become diffused in organizations, and most people put it way down the list of priority tasks. It's a dull job, so there's little desire to do it. File cabinets are jam-packed, so there's not even a place to easily do the task of filing. With ç

*cont. pg. 2*

### Inside this Issue

- 1 Driving Home the Cost of Clutter
- 2 MER Conference 2003
- 3 Upcoming Events
- 4 Treasurer's Report and Announcements
- 5 XML and the Record Manager

Disclaimer: Contributions or gifts to the Association of Records Management and Administration, inc. are deductible as a charitable contribution for U.S. Federal Income Tax purposes. c. ARMAWAUKEE 2003



Cont. from pg 2

### Driving Home the Cost of Clutter

downsizing, no one feels like they have the time to file.

With filing being performed at all levels in an organization, there are naturally inconsistencies in filing and retrieval methods. Everyone may have their own method of filing...but what if they leave the company, or are out for an extended period or even for an afternoon when critical documents can't be found? Others needing access to common files can't find information when only the absent employee knows the filing process.

### Beating the Battle of the (Paper) Bulge

To wage war on burgeoning piles of paper, consider this suggestion: take a hard look at the need to keep or need to keep or personal messaging systems. 93% of business information is in digital form (University of California at Berkeley, 2000). By 2005, there will be an estimated 225 million email boxes in use by organizations worldwide. A typical business user spends just over two hours using e-mail each day.

53% of business users check email at least 6 times a day.  
4% of business users check email constantly throughout the day.  
Business users spend 49 minutes per day managing email accounts.

There is email and electronic document management software available. However, you would do well to use the same principles for e-mail as for paper document management. Decide what action to take on the document while it's still in the inbox, and either act on it, file it, or delete it. Mute your PC's volume control so you are not aware of each email's arrival during the day. Limit yourself to certain times of the day, and a certain time limit, to check and manage email.

### The News is Not All Bad

Getting organized is a learning process. It's important realize that a messy desk is not a reflection of one's character. You don't have to be a neatness fanatic, but it helps to be armed with effective ways to handle paper to win the war against clutter. Karen MacFarland Payne owns Precision Organizing and Records Management and is a professional residential and office organizer and records management consultant for individuals and businesses in both the

public and private sectors. Contact: 262.549.4318, or karen@precisionorganizing.com



## **Report on Managing Electronic Records (MER) Conference 2003 September 22-24, 2003 in Chicago, IL Pre-Conference Tutorials September 21, 2003 Presented by Cohasset Associates, Inc.**

By Andrew Z. Pusztai

**Purpose and Scope:** This conference focused on the legal, technical and operational issues related to managing electronic records. It is the only such conference of this type and was totally dedicated to managing electronic records through their life cycle. The conference offered attendees twenty-one (21) educational sessions, five joint sessions, and a keynote address by a very distinguished panel of experts. Also, for those interested, there were four pre-conference tutorials available.

Another opportunity this conference provided is having to see the latest tools that several exhibitors/vendors are offering, and take advantage of valuable networking opportunities to discuss similar issues and problems with other attendees.

**Pre-Conference Tutorial:** I decided to attend tutorial T4, "Digital Preservation from A-Z: A Comprehensive Examination of the Migration and Emulation Options". It was presented by two of the industry's foremost experts, Jeff Rothenberg and Charles Dollar. They gave an excellent overview of the subject and provided insights of what records and information managers (RIMs) should know of options currently available to them. Beginning

*Cont. on pg 3*

Cont from page 2  
with the definition of digital preservation, they went on to discuss the difficulties and implications of the problems facing us and the electronic records archives. There is no one solution that fits all, so there were various options presented, each with their advantages and disadvantages. It

*Cont from pg 3 column 3*  
was very informative and the material presented addressed the latest technologies available.

**Educational Sessions:** I selected and attended seven of the educational sessions. They were:

Managing Electronic Records:  
A Project Approach  
MER Exhibitors Panel:  
Professional Development  
The Missing “Yeast” in Most  
ERM “Bread”: IT ERM  
Strategies Standards and

---

*I*

Processes  
CASE STUDY: Establishing a  
Productive Partnership  
Between IT and Records  
Management (presented by  
Milwaukee Chapter member  
Lori Ashley)  
Applying Retention Schedules  
to Database: A Needed New  
Dimension to the Process of  
ER Life Cycle Management  
Avoiding Corporate  
Alzheimer’s – The Loss of  
Digital Records Due to  
Technological Obsolescence  
Automatic – Classification (of  
ER) that Works

Other subjects and sessions included managing e-mail, e-business, HIPPA, auditing records, and impact of the Sarbanes –Oxley Act on ERM. Each subject has its merits and all are timely to the RIM professional.

**General Comments on Conference:**  
This was my first MER Conference and I was quite impressed with the subject matter covered, the speakers and the key

points presented overall. I would recommend this conference to anyone who needs to know more about electronic records management, and that is pretty much all of us. There was some representation by IT, but not nearly the numbers that should be attending. Records Managers need to encourage their IT staff to attend these conferences. I found quite a large number of legal records professionals and lawyers also in attendance. The area of electronic records is growing very fast, as was pointed out by several speakers at the conference. Senior executives and legal counsels of companies need to understand and deal with possible records litigation that, at some point, will be inevitable. The RIM professional should be there to help their company prepare for such situations.

Cohasset provides all of the presentations of the conference and keynote speakers in PowerPoint along with voice recordings in addition to the binder of handouts. I expect to receive the CD later this month in November. If interested, I can share it with those interested. I was fortunate to attend this conference and hope all of you can make the next MER Conference scheduled to be given next spring on May 24-26, 2004.



## Congratulations

CONGRATULATIONS to ANGIE MORGANO, our new ARMA Milwaukee Chapter Member of the Year 2003! Each year one member who contributed outstanding service to the local chapter is select for this honor. Angie Morgano did an outstanding job of contributing to the overall success of our chapter this year! Angie was honored at a special Great Lakes Region Champagne Toast on Monday night. The look on her face, when they announced her name, was

## Mark your Calenders.....

January 23, 2004  
Joint Meeting with AIIM  
Lucheon at Alioto’s  
Topic:  
Content Management

February meeting TBA

March 16, 2004  
Speaker: Pat Cunningham  
Topic: Role and Competency of  
Records and Information  
Managers.

April 6, 2003  
Annual Spring Seminar  
Speaker: Randy Kahn, esq.  
Raddison-Mayfair

More information to come.....

priceless! She was so humbled and shocked. She also received a special ribbon to wear during the remainder of the conference. The wooden plaque will be sent to her home in the next few weeks. What an honor! CONGRATULATIONS Angie! Way to go!

Angie's luck was really working for her in Boston, because she won a Live Lobster Dinner for Two. Boo Hoo for us who were planning to help her eat them... they shipped the live lobsters to her home.

The things I appreciated most about the conference were 1) the caliber of speakers 2) the new books available in the ARMA Bookstore and 3) the report on email research funded by the ARMA Educational Foundation.

John Montana was commissioned to conduct the research. He presented his information twice because the room overflowed with people who wanted to hear his talk about the project. The complete research results can be found at the

Foundation's website at <http://www.armaedfoundation.org/images/LegalObstaclesv6.3.4.pdf>

This year more than ever, I was impressed by the number of speakers and the timely information they brought to their audiences. You could take their information home and use it right away.

There is one book in particular that I recommend if you are updating your records management program policies. "Electronic Records Retention: New Strategies for Data Life Cycle Management" by David O Stephens, CRM, FAI and Roderick C Wallace, CRM. This book was just hot off the press and well worth the \$35.00 cost. It has sample policies that are good enough to plug and play.

The thing I hated most about the conference was the lack of handouts in the proceedings book. I use the proceedings book to make choices about which sessions to attend and which don't interest me. This year, very few of the handouts were published in the proceedings book. When I went to the sessions many speakers said things like "the slides will be available on my website" or "ARMA intends to publish these slides on their website after the conference". That didn't do me any good while I was listening to the speaker.

It is my personal opinion... if speakers can't get their handouts in on time, they should be barred from speaking. Think about this. What would our attendees say if we didn't have materials for them to use in our Spring Seminar? We would never get repeat attendance. I also believe you should never complain or criticize anyone without offering a suggestion to solve the problem. So, let me assure you that, I've already written to and gotten a response back from ARMA on this point. They are working to resolve the proceedings book - handouts issues before the next conference.

ARMA recently posted the conference slides on their website. Go to <http://expo.arma.org/sessions/presentations/> The keynote speakers were William Hooton (FBI CIO) who spoke on "Information Challenges in the New FBI" and Francis deSouza, who covered "Instant Messaging - The New Record." Their presentations are also available on the ARMA website.

Mark you calendars for next year. The 49th Annual ARMA Conference is in LONG BEACH, CA, October 3-6, 2004.

### TREASURER REPORT

November Treasurer Report  
Treasurer - Angie Morgano

Checking Account Balance as of 11-24-03  
\$1,078.12

Money Market Balance as of 11-24-03      \$5,930.57

ADVERTISING RATES:

IF YOU ARE INTERESTED IN ADVERTISING IN ARMAWAUKEE

RATES:

\$300.00 full page ad  
\$200.00 half page ad  
\$100.00 1/4 page ad

for 6 issues

if interested contact Peg Eusch  
[meusch@earthlink.net](mailto:meusch@earthlink.net)  
262-253-1304  
N84W16155 Donald Court  
Menomonee Falls, WI. 53051

### ANNOUNCEMENT

We are asking for any member who would like to help organize the Spring Seminar. I challenge any new member who wants to join us to feel welcome.

**Seminar Team Members from Milwaukee** - Arlyce Vogel, Sharon Chudy, Mark LeMahieu, Pat Hardy and any new members who will volunteer

**Seminar Team Members from Des Plaines River Valley Chapter** - I'm assuming we'll link up again with DesPlaines River Valley Chapter - but I haven't talked with them yet.

**Tentative Date** is very early in April 2004 (since Easter is on the 11th we'd like to have it before then)  
**Location** is Radisson Hotel Mayfair If you would like to help out please contact any of the Seminar team members Arlyce Vogel – Seminar Team



A BIG THANK YOU.....

Thanks to Karen Payne, Arlyce Vogel, CRM, Andrew Pusztai, and Antonio Mayo for their contributions to the Newsletter.

## XML and the Records Manager

By Antonio Mayo  
UW Milwaukee Student

The best way to tell you how well I enjoyed the Web Seminar on November 13, 2003 sponsored by ARMA International Education and Training and co-sponsored by SOIS and the Milwaukee chapter of ARMA is to share with you what I gained from the presentation.

The detailed information about XML and the Records Manager was well prepared and delivered. The seminar touched on XML's role in the next wave of technology. And based on the information disseminated I can agree that the creation of a software designed to ease information interchange would enhance both human and technological advancements. Especially, if the software can store and exchange information between different applications and operating environments. I have a feeling that although this software would benefit the information industry, it may create problems in other business sectors and future technological advances. I do not think this XML can be utilized in the next 1000 years. Especially since we have no idea as to the kinds of computer systems we will have in 1000 years.

These seminars educated its audience and publicize its

product –really giving us something to stash away in our heads for later reflection and application. I like to thank Professor Dennis Larsen and ARMA for providing this opportunity for UWM students.



### FROM ARMA.....

#### **Now Available! *Records Management in the Legal Environment***

The book every legal records manager should have - *Records Management in the Legal Environment: A Handbook of Practice and Procedure* by Jean Barr, CRM; Beth Chiaiese, CRM; and Lee R. Nemchek, CRM - is now available in the ARMA International Bookstore.

#### **Just Released! *The Sarbanes-Oxley Act: Implications for Records Management***

Do you need help developing programs and methods to ensure that your records and information management program complies with Sarbanes-Oxley rules? If so, *The Sarbanes-Oxley Act: Implications for Records Management*, now available from the ARMA Bookstore, is for you.

#### **Online RIM Courses Make Learning Easy, Convenient**

Whether for you or your staff, learning about RIM has gotten easier and more convenient with ARMA International's online course offerings. Currently you can choose from courses on [RIM basics](#) (excellent for individuals new to the field) and [vital records management](#) (a must for everyone), as well as [privacy](#) and the [Health Insurance Portability and Accountability Act \(HIPAA\)](#). For course descriptions and registration details visit the ARMA Learning Center at <http://learningcenter.arma.org>. For information about other educational offerings from ARMA International, visit us at <http://www.ama.org/learning>.

(Web Posted 11/14/2003)

# **Record Storage Boxes from Frederick Packaging, Inc.**

15 x 12 x 10" Box with a Cover  
Measured Length x Width x Depth = 1 cubic foot  
Our Box Fits Letter and Legal Sized Documents



Manufactured using #200c Linerboard

- Available in kraft or white
- Available printed or plain
- Baled and bundled for easier handling
- Sturdy box construction design allows you to maximize usage
- Call with quantity for pricing

Phone: 414-438-9600      Fax: 414-438-9601

E-mail: [sales@frederickpkg.com](mailto:sales@frederickpkg.com)

11918 W. Silver Spring Drive  
Milwaukee, WI 53225

## ARMA MILWAUKEE

### 2003-2004 BOARD MEMBERS

#### **Steven Webber, President**

Northwestern Mutual  
720 E. Wisconsin Ave., Corporate Services EO1Q  
Milwaukee, WI 53202  
Phone – 414-665-4060  
E-mail – [stevenwebber@northwesternmutual.com](mailto:stevenwebber@northwesternmutual.com)

#### **Patricia (Pat) Hardy, Past President**

RIM Manager  
UMB Fund Services  
803 W. Michigan Ave, Suite A  
Milwaukee, WI. 53233  
Work Phone – 414-221-6941  
Work E-mail – [patricia.hardy@umbisg.com](mailto:patricia.hardy@umbisg.com)

#### **Sharon Chudy, Vice President, Programs**

Milwaukee Metropolitan Sewerage District (MMSD)  
260 West Seeboth Street  
Milwaukee, WI. 53204-1446  
Phone- 414-225-2208  
E-mail – [schudy@mmsd.com](mailto:schudy@mmsd.com)

#### **Angie Morgano, Treasurer**

Northwestern Mutual  
720 E. Wisconsin Ave.  
Milwaukee, WI 53202  
Phone – 414 665- 4606  
E-mail – [angiemorgano@northwesternmutual.com](mailto:angiemorgano@northwesternmutual.com)

#### **Linda Walker, RHIA, Recording Secretary**

Strong Funds  
P.O. Box 2936  
Milwaukee, WI 53201  
Phone – 414-359-3923  
E-mail – [lwalker@strong-funds.com](mailto:lwalker@strong-funds.com)

#### **Karen MacFarland-Payne, Membership Chairperson**

Precision Organizing and Records Management  
2103 Allen Lane  
Waukesha, WI. 53186  
karen@precisionorganizing.com  
Phone- 262-549-4318

#### **Peg Eusch, RHIT Newsletter Editor**

N84W16155 Donald Court  
Menomonee Falls, WI. 53051  
Phone – 262-253-1304  
E-mail – [meusch@earthlink.net](mailto:meusch@earthlink.net)

#### **Dennis, Larsen, CRM, Education Liasion**

Milwaukee County  
Phone- 414-223-8118  
E-mail- [dlarsen@milwcty.gov](mailto:dlarsen@milwcty.gov)



**Attention CORE Club Members!**



**ARMA International Improves...**

ARMA offers numerous continuing education programs and publications designed to help you build skills and knowledge that make you even more valuable to your organization.

**ARMA International Promotes...**

**ARMA promotes the importance of RIM so that senior management and practitioners alike better understand the value of managing information as an organizational asset.**

**The Power of One** ARMA's in full swing now and since you're a Member-get-a-Member Campaign, is seasoned PRO, we need your help!

You're one among an elite group of professionals dedicated to Connecting Others through Recruitment and Encouragement (**CORE**). Retain your CORE Club status by recruiting at least one new member during ARMA's new campaign, **The Power of One**.

You can lead by example -- encourage a colleague to join ARMA; compete for great prizes, and **tell others how you did it!**

Is there something that's working for you -- making your recruiting efforts easier? Then share it with other members as a recruiter's tip or better yet, write a brief article on your success. Recruiter's tips and articles will be posted online. Please send your submissions and questions to Cindy Osterle at [costerle@arma.org](mailto:costerle@arma.org) today! **Your feedback is appreciated.**

You recruit a member, they recruit a member and so on and so on! You know the ropes -- now see if you can break last year's record! **The Power of One -- how many new members can you bring in this year?**

SECURITY  
MICRO  IMAGING

Your single source for managing and securing digital and analog information



[info@securitymicro.com](mailto:info@securitymicro.com)

Milwaukee  
Chicago

414/271-3074  
847/816-6172

Fax: 414/271-7317  
Fax: 847/816-6173