



Brian's Reflections

Brian Starck, CRM, President

Take a step back. Sometimes that can be the hardest thing to do. We get so caught up in the day-to-day (and sometimes hour-to-hour) needs of business that there is simply not enough time. I would say that stepping back is sometimes the best thing you can do.

Once every 6 months or so, I block out half a day to see where I've been, what I accomplished, and what I need to focus on for the next 6 months. Here are some of the questions I ask:

Have I looked at my processes and procedures lately? Am I still following them? Do they need to be changed?

Are my metrics still valid? Am I tracking things I shouldn't or don't need to? Is there something else I should be tracking?

Is there a way to automate what I'm doing? Can I be doing some of this electronically? What would it take to do that?

What's outside the box? Is my thinking too narrow? What if....?

What have I done to increase my professional knowledge? How often have I attended ARMA meetings, webinars, on-line training through work?

So this month's challenge is to step back. Take a look at yourself and how you work. Above all, be honest with yourself. Everybody has areas they can improve on and things they can learn. Then create a plan to get you where you want to be. Talk with your manager or supervisor and see how they can support and encourage you to reach that goal!!

October Meeting — Tour — City of Lakewood Tues, October 16, 2007, 11:30 am

Lakewood's Document Imaging System —
Power Point Presentation
followed by
Optional Walking Tour of Scanning Stations

For details & to register:

click on <http://www.armacolorado.org/meetingspages/monthlymeeting.htm>

An overview of the City's imaging system presented by Sharon Blackstock, CRM, Central Records Administrator, Lakewood City Clerk's Office. Sharon has been an ARMA member for over 10 years, is a past-president of the chapter, and currently serves as Chapter Secretary.

A live demo of the imaging system will be presented by members of the City's Digital Archives Group (DAG), including Greg Buchanan, Imaging Technician and 5-year member of ARMA; Spencer Curtis, Right-of-Way Agent; Alan Searcy, Stormwater Quality Coordinator; and Kevin Corzine, GIS Specialist.

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Lakewood's Imaging System—To Infinity & Beyond

City of Lakewood Digital Archives Group

In 1999, the Engineering and Property Management Divisions of the City of Lakewood organized the Digital Archives Group (DAG) to analyze and select software and scanning equipment for “e-size” drawings (maps, plats, plans). DAG included Public Works / Engineering, Finance/Property Management, and Community Planning & Development. Soon, it included Community Resources/Parks & Recreation, City Clerk's Office/Central Records, and IT.

City engineers, property management, planners and permit staff had long been frustrated by the massive amount of maps, plats, plans, and recorded documents they would dig through to respond to citizen requests or to review new proposals. Well organized and managed through a computerized index, differing needs of departments resulted in duplication of records and frequent “hunts”. Records storage was inadequate and dispersed all throughout the building. Long-term or permanent maps, plats, plans and recorded documents were microfilmed for preservation purposes.

Selecting Software & More Software

The DAG selected Exeview software.

1. Engineering Division started scanning 30 years worth of e-size (large format) documents
2. Property Management scanned subdivision plats and quarter section files containing deeds for real property, rights-of-way, and permanent easements dating back to the late 1800's.

DAG monthly discussed issues related to coding, naming, fields, templates, searching techniques and difficulties. Decisions had to be made:

1. who had access to the data,
2. who “owned” the records,
3. where does the record copy reside,
4. how long should it be retained, and
5. how should it be protected, standardization of abbreviations, when (or if) the paper or mylar originals should be destroyed.

Lengthy discussions were held about how to index and code documents so they could easily be found (eight years later, we're still having these discussions).

During 2001, the manufacturer of Exeview

closed its doors and the DAG had to select another software vendor. The group focused on Laserfiche — well known in the municipal sector and providing the future option of allowing website access to documents for citizens.

Document imaging software opened the door for organization-wide access to documents. The City Clerk's Office had microfilmed permanent and long-term records for multiple departments for nearly twenty years. They decided to stop filming and start imaging.

SUDDENLY, the DAG could scan EVERYTHING! This had to be addressed quickly and firmly. The DAG's position:

The purpose of the document imaging program, at least initially, was to protect closed/inactive historic, permanent and long-term records, plus some high volume records with shorter-term retention that were accessed frequently by multiple departments.

Who “owned” the administrative licenses? Who decided whether a field could/should be added? How many different templates? What record series to include? Password security was established when confidential records were added. A DVD-backup program was developed for long-term protection in addition to nightly tape backups done by the IT Department. As viewing licenses were installed throughout the departments and imaging possibilities began to jolt creative minds, there were many proposals, hopes and fantasies forwarded to the group.

And then there was Training!

For some, playing with the program to find the best way to search for information was a blast. For others, it was torture. DAG members take responsibility for training the folks in their work groups, but it remained the number one challenge for DAG in the early years. DAG developed presentation materials for Management Team and City Council, who have been incredibly supportive and excited about the project. A Laserfiche Open House in December 2002 introduced employees to the program. It allowed them to visit all the scanning stations to see how records are processed, stored, filed electronically and how to search for and print documents.

By the end of 2002 it became clear that more

Lakewood's Imaging System—To Infinity & Beyond (continued from page 2)

administrative and viewing licenses were needed. A decision was made to upgrade to a new Laserfiche version in 2003. As new administrators are added, they are invited to join the Digital Archives Group and become involved in the discussion and decision-making. During 2003, the first active records application on Laserfiche was developed, that of scanning sales tax returns, a record series with a relatively short retention period, and one which the City is required to protect from public access, but which needed to be reviewed by multiple persons in the Finance Department. The decision about whether or not to make records web-available is still in the future. Much of what citizens ask for is already available on the City's website, and the decision about when, if, and what archived records should be made available has been postponed indefinitely.

Success, Upgrades and More

Lakewood's Digital Archives Group has been a phenomenal success, and many of its initial goals have been met – long-term records are being protected, concurrent use of imaged records is now possible, and storage space needed for maps, plats, and plans has been reduced. Another goal which wasn't defined early on, but which has proven to be very important, has also been achieved – *interdepartmental cooperation has resulted in a citywide sense of pride and ownership of the City's document imaging program.* This has resulted in a greater understanding of electronic records and the unique challenges we face in protecting and managing such records long term.

In the last few years, there have been several upgrades, and add-ons.

- Laserfiche Plus was added to allow us to create self-launching CDs for staff members who needed access to particular information in the field and in response to certain public records requests.
- The historical backup system has evolved from burning multiple CDs and DVDs, to downloading the entire database onto a removable drive on a quarterly basis and storing the drive stored off-site.
- In the last couple of years, we have slowly added active records to the imaging system, requiring us to create non-automated procedures for managing their disposition (examples: contracts).
- Financial investment in the system has been

modest, so we have developed a number of manual procedures for managing the electronic records.

- We have also been cautious about considering web access to the city's imaging system, in part because of cost, in part because most of our legislative documents are available on the city's website, and in part because there has not been a public demand for web-access to the system. A viewing station is available in the City Clerk's Office where citizens may search public records available on Laserfiche or microfilm.

To 2008 ... and BEYOND!

Looking ahead – during 2008 we will be evaluating a couple of add-ons to the system, Records Management Edition and Agenda Manager, with the goal of developing an electronic City Council packet process.

This article was compiled by Sharon Blackstock, CRM, Central Records Administrator, Lakewood City Clerk's Office and Secretary of Mile High ARMA; and members of the Digital Archives Group including Greg Buchanan, Imaging Technician and 5-year member of ARMA; Spencer Curtis, Right-of-Way Agent; Alan Searcy, Stormwater Quality Coordinator; and Kevin Corzine, GIS Specialist.

There are those who make things happen;
those who watch things happen;
and those who don't know what the heck
happened.

unknown

Some Reflections on the Paperless Office

David O. Stephens, CRM, FAI

I often conduct seminars on various records management topics throughout the U.S. and elsewhere and, frequently, the subject of the “paperless office” comes up, usually in the context of the transition from paper to digital as the predominant recordkeeping medium in business and governmental organizations. During the discussions with my audiences (sometimes the debate is quite spirited), I give vent to my own views of the matter. I usually state that it is fallacious logic to assume that, just because a paperless office hasn’t happened during the last thirty years doesn’t mean it won’t happen during the next thirty. I go on to say that the transition to a (nearly) all-digital recordkeeping environment is not a question of whether but when. These pearls of wisdom from the mouth of David Stephens are invariably greeted with polite smirks from some persons in the audience. Someone usually offers the old saw that “the office will be paperless when the bathroom is paperless!” That always gets a chuckle!

It is clear that some records management specialists, who work with large volumes of “legacy” paper records each and every day, are skeptical of any notion that business offices will become anywhere near paperless in the foreseeable future. After all, those who are responsible for managing records centers – whether in-house or outsourced, see only growth, not decline, in the volume of paper confronting them.

And so, in the face of such skepticism, I usually try to bolster my arguments by citing some sources from on high. For example: According to *The Social Life of Information*, a seminal study by John Seely Brown and Paul Duguid, by the middle of the present century “. . . all information about physical objects, including humans, buildings, processes and organizations, will be online. This is both desirable and inevitable.”

Whether business offices will ever reach anything approaching a state of “paperlessness” is, I think, worthy of serious consideration by those of us who are paid to manage records, in all forms and formats, for a living. Behind the crude witticism that the office will become paperless when the bathroom becomes paperless lies an essential truth: Just as toilet tissue is the best medium for its task so, too, is office paper, at least in some situations. Despite its many limitations, owing to its physical properties, paper is, undeniably,

the best and most convenient medium for some tasks and activities related to organizational work. We continue to have paper because it is best and most convenient medium for certain office tasks and recordkeeping functions, it is very easy to produce, and such production is deeply ingrained in the behavior patterns of office workers.

But what about the future? During the next twenty or so years, a new generation of office workers will take the places of my generation. My contention is that my generation’s children and grandchildren *are people who have never used filing cabinets as recordkeeping devices and will not do so when they enter organizational life.* (Do your children or grandchildren, who are highly skilled with computers, use filing cabinets?) This is, I think, the decisive factor that will lead us, eventually, to the nearly all-digital office.

The role of paper is shifting – very rapidly. Forty years ago, organizations ran off paper; now they run off computers. Every “business-critical” recordkeeping system in the enterprise either already has or soon will be converted from paper to digital media. Increasingly, paper records are being relegated to the status of “casual printouts” – convenience copies of documents, nearly all of which are not only “born digital” but will continue to remain in digital format for the full duration of their retention life.

Finally, it should be understood that the transition from physical to digital recordkeeping environments is a *long-term trend* that began during the 1970s and ‘80s, is now proceeding rapidly and will only accelerate during the ensuing decades, when a new generation of workers will take their places. So if the Paperless Office has not yet materialized, the Era of Digital Recordkeeping has certainly arrived! The only question is how soon it will come to full fruition. In some organizations, the transition to nearly all-digital recordkeeping may take another ten or so years to come to fruition. In other environments, the transition may take another twenty years or even longer. But it will happen!

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David Stephens, Vice President, Records Management Consulting, at Zasio Enterprises, Inc, has been a Certified Records Manager since 1977. His most recent book is *Records Management: Making the Transition from Paper to Electronic* (ARMA International, 2007). Contact him at: dostephens@zasio.com.

NEW AT ARMA BOOKSTORE



The Digital Records Conversion Process: Program Planning, Requirements, Procedures

Author: ARMA Standards Development Committee Task Force

Member: \$40.00; **Non-Member:** \$60.00

This ANSI/ARMA standard provides requirements for ensuring that electronic records remain authentic and trustworthy as they are converted from one digital recordkeeping system to another. Though it does not address digital preservation, there is a substantial link between conversion and digital preservation, as many preservation strategies involve some type of conversion process.

Part I of the standard addresses the decisions relating to program planning and recordkeeping issues. Part II discusses the actual conversion process. Appended are tables, a template that draws together recordkeeping requirements, the risks/drivers impinging on the process, the controls, and the stages of the conversion process, and other tools designed to aid records professionals and others assigned the conversion task.

Using this standard in conjunction with the international standard *ISO 14721:2003, Space data and information transfer systems – Open archival information system – Reference model* will provide substantial background and contextual information to better inform the issues addressed in the standard.

ANSI/ARMA 16-2007 was approved as an American National Standards Institute (ANSI) standard March 1, 2007.

Records Management: Making the Transition from Paper to Electronic

Author: David O. Stephens, CRM

Member: \$40.00; **Non-Member :** \$55.00

Traditional records and information management (RIM) programs have been organized around paper-based, physical recordkeeping systems and processes. However, organizations must transition from the paper-based model to a new model built around the management of electronic records to optimize the value of information by ensuring that it is easily accessible, complete, true and accurate, and fully usable for any and all legal and business purposes. *Making the Transition from Paper to Electronic* focuses on 10 key ingredients for making this transition.

Major topic areas include:

- records retention
- auditing and compliance
- recordkeeping and the law
- improving recordkeeping system performance
- records protection
- information access, privacy, and security
- software solutions
- digital records preservation

Check out ARMA International website for more titles

<http://www.arma.org/bookstore/>

The more that you read,
The more things you will know.
The more that you learn,
The more places you'll go.

I Can Read With My Eyes Shut!
Dr. Seuss (1978)

Mile High Denver Chapter
700 N. Colorado Blvd, #105
Denver, CO 80206

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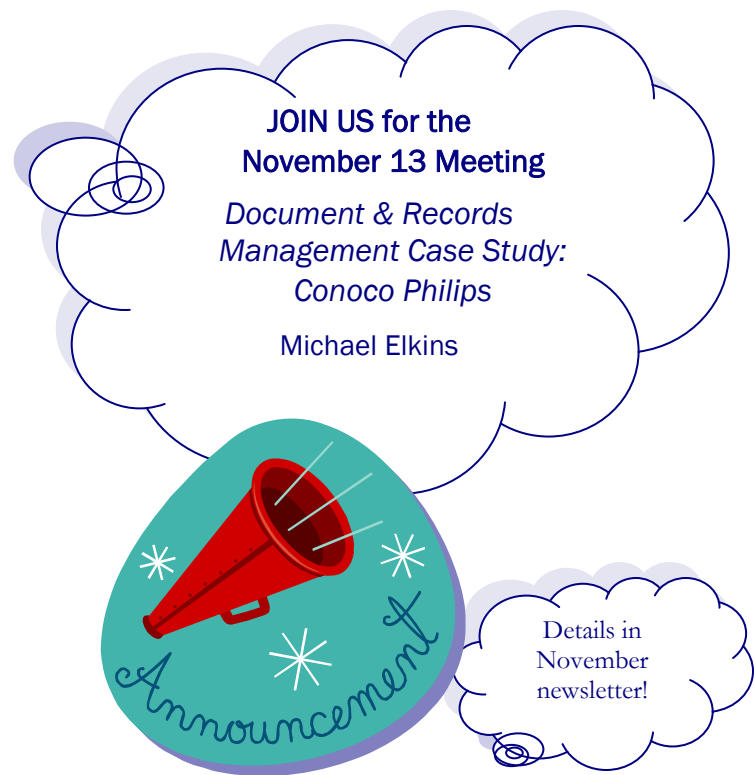
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NEWSLETTER EDITOR & PUBLISHER

Chris Ames
c/o Littleton/Englewood Wastewater Treatment Plant
2900 S Platte River Drive
Englewood, CO 80110
303.783.6821
comes@englewoodgov.org

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What is the AIEF "5/100 Legacy" Campaign?

The ARMA International Educational Foundation (AIEF) kicked off its *"5/100 Legacy" Campaign* at the annual ARMA 2002 conference in New Orleans. Members are being asked to pledge \$100 each year for the next 5 years toward building the Foundation Endowment. This Legacy Campaign represents an opportunity for members to make an investment in the future of records and information management. The goal is to raise \$1.5 million for the endowment.

The *"5/100 Legacy" Campaign* is a special component of the Foundation's endowment pledge campaign. To encourage participation, rewards are offered to the ARMA Chapter with the greatest membership participation and to the ARMA Region whose members contribute the largest

dollar amount to the Endowment.

The Foundation will invest the annual income produced by the endowment to meet the strategic goals for advancing the status of the profession:

- Support research to address critical issues in information management
- Provide education development grants to enhance knowledge, skills, and abilities of practitioners in the field
- Foster educational initiatives that develop information management skills and programs

Member support of the *"5/100 Legacy" Campaign* will help ensure the success of these initiatives and the growth of the profession.

Mile High Chapter challenge — 3 (count 'em) THREE members — sign up for this worthy cause. Where is the Pledge Form?

http://www.armaedfoundation.org/images/5_100_Pledge_Form_Rev2.pdf



Interview with Jann Kidd, Certified Records Manager

Congratulations to Jann Kidd who received her CRM

designation this spring. *Mile High Register* had a chance to visit with her.

What was your first job ever?

My first real job was as a summer custodian at my high school.

How long have you been in the Records Management profession?

About 20 years.

Why did you want to get your CRM designation?

I felt that obtaining my CRM designation would help me to expand my records knowledge beyond legal records management, which has been the main focus of my career thus far.

How long before you decided to sit for the CRM?

Not too long. I decided to sit for the CRM long before I actually began the process. The delay had to do with scheduling issues.

How will CRM benefit you personally and professionally?

The continuing education aspect of being a CRM will encourage me to keep up with all of the changes and challenges in our profession.

Did you have a study group?

I did not have the benefit of a study group, but it would have been helpful to have been a part of one.

What/who did you find helpful through the process?

Two things were helpful to me through the process. I utilized and studied from the handbook, "Preparing for the CRM Examination" from the Institute of Certified Records Managers. In addition, the opportunities that my firm provided to me to assist with projects on the corporate level were very valuable learning experiences.

What, if anything, did you have to give up during the whole process?

I gave up a few lunch hours to study for the exams.

What was the hardest thing about the CRM application and examination process?

The hardest thing about the application process for me was tracking down people I used to work with who could verify my experience in the field. All of my past employers had gone out of business so it was a challenge. The hardest part about the examination process was finding a proctor to administer the tests.

What was the easiest thing about the CRM application and examination process?

I missed out on being able to do parts 1-5 on the computer. I think that will make the process easier.

Who is someone you admire professionally, and why?

Jeanne Schenkelberg, fellow CRM and a mentor to me. Jeanne has superior knowledge in the Records Management area and is always willing to share her wisdom.

What would you say to anyone considering going for their CRM?

Take the first 5 parts all at once instead of one at a time. You may pass most if not all of them on the first try and if not, you will have a better idea of what to study for the next time around.

What advice do you have to people new to the Records Management profession?

Become familiar with as many Records Management software packages as possible. Focus on electronic records and be open to new ideas.

Jann has worked in the Denver office of Baker Hostetler LLP, a national law firm, for about 10 years. In addition to handling all of the local department issues, she has been involved in records decisions at a corporate level including the selection and implementation of records management software.

Congratulations, Jann, on your accomplishment!

If you are interested in finding out more about the CRM exams, check out the ICRM website <http://www.icrm.org/>



Mile High Denver Chapter of ARMA Continues Its Support

At its September 11, 2007 meeting, the Board of Directors voted to continue its support of The Fisher House.

The Fisher House is a home-away-from-home for veterans or active duty military who are in the area to visit a hospitalized family member or for the family of hospitalized veterans or active duty military. Also welcome to stay at the Fisher House are veterans or active duty military from out of town who are undergoing an extended episode of outpatient therapy, are able to care for their own personal needs, and are accompanied by a family member or friend.



Jann Griffiths, Program Director, will present information about the Fisher House at the November and December chapter meetings. Members are encouraged to bring contributions to the October, November & December meetings.

The Chapter will present a check to Jann at the December meeting.

<http://www.denverfisherhouse.org>

2007-2008 Programs

Winter 2007-2008

- Dec 11 — *Hurricane Katrina—Disaster Recovery*, Emilie Leumas
- Jan 15 — *Email Management (1/2 day workshop)*, Chris Ryan & Patrick Cunningham
- Feb 19 — *Data Privacy & Security ... Implications for Records Managers*, Stephanie McCutcheon, CRM

Spring 2008

- March 18 — *System Architecture in Support of Records Management*, Chris Olsen
- April 15 — *Project Management for Records Managers*, Martin Van Der Schouw
- May — Annual Spring Seminar
- June — Member recognition and appreciation, Annual Business Meeting

Fall 2007

- Sept 18 — *History of Records Mgt and Its Impact on Government and Commerce*, Carol Choksy, President, ARMA Intl

Oct 16 — *Tour: City of Lakewood Records Center*, Sharon Blackstock, CRM

- Nov 13 — *Document & Records Management Case Study: Conoco Phillips*, Michael Elkins

Jannette Wesley, CRM
Programs Director

2007-2008 Board of Directors

Mile High Denver
ARMA
700 N. Colorado Blvd #105
Denver, Colorado 80206

Email: access@armadenver.org

www.armadenver.org

President

Brian Starck, CRM – 303.868.1273
Email: bstarck@sourceone.com

Chairperson of the Board

Gregg Luther – 303.766.8911
Email: gluther@interwoven.com

President-Elect

Mollie Taggart – 303.272.5132
Email: mollie.taggart@sun.com

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Email: linda.hughes@williams.com

Secretary

Sharon Blackstock, CRM – 303.987.7091
Email: shabla@lakewood.org

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Emily Bone – 303.295.8463
Email: erbone@hollandhart.com

Administration Director

Genny Garrett – 720.267.2960
Email: genny_garrett@cable.comcast.com

Budget Director

Ebbie Moody – 303.636.1143
Email: emoody@co.arapahoe.co.us

Communications Director

Chris Ames – 303.783.6821
Email: comes@englewoodgov.org

Education Director

Rebekah Keller – 303.373.0557
Email: rebekah.keller@ironmountain.com

Membership Director

Ron Vince – 303.308.1000
Email: rvince@docuvault.com

Program Director

Jannette Wesley, CRM – 303.969.2131
Email: jannette_wesley@nps.gov

ICRM Ambassador

Brian Starck, CRM – 303.868.1273
Email: bstarck@sourceone.com

Web Master

Kyle Koster – 720.267.2964
Email: webmaster@armadenver.org

About ARMA International

ARMA International is a not-for-profit professional association and the authority on managing records and information – paper and electronic. The association was established in 1955. Its approximately 11,000 members include records managers, archivists, corporate librarians, imaging specialists, legal professionals, IT managers, consultants, and educators, all of whom work in a wide variety of industries, including government, legal, healthcare, financial services,

and petroleum in the United States, Canada, and 30-plus other countries. The mission of ARMA International is to provide education, research, and networking opportunities to information professionals, to enable them to use their skills and experience to leverage the value of records, information, and knowledge as corporate assets and as contributors to organizational success.

ARMA International publishes *The Information Management Journal*, the only professional journal specifically for professionals who manage records and information on a daily basis. The award-winning

Journal is published bi-monthly and features top-drawer articles on the hottest topics in records and information management today, as well as marketplace news and analysis.

The association also develops and publishes standards and guidelines related to records management. It was a key contributor to the international records management standard, ISO-15489.

Access the ARMA International website at <http://www.arma.org/> or call 1.800.422.2762.