

# Terra Nova Times



Winter 2011

## Inside this Issue:

This newsletter will be published four times per year and distributed to all members free of charge through e-mail and will also be posted on our chapter website for any interested person not directly employed in the information management industry.

The intent is to format the newsletter around the concerns and interests of our members based on input from them.

We invite your comments and questions on issues and educational needs you have.

Please contact any member of our Executive if you wish to submit an article for publication.

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## *A Note From the President*

*Happy New Year! (I guess it's still safe to say that!) Nevertheless... welcome to the Winter Edition of the Terra Nova Times...and it looks and feels like winter has finally arrived!!*

*With the hustle and bustle of the festive season not that far behind us, it is still a good time to reflect on the great year that was 2010 and look forward to an exciting new year that has only just begun.*

*Our chapter had an extremely busy and successful year last year. We hosted many informative lunch and learns, celebrated our 20<sup>th</sup> Anniversary in great style, exceeded expectations at our tremendously successful biennial conference, saw an increase in chapter membership and to top it all off enjoyed a fabulous Christmas luncheon! Thank you and congratulations to our chapter members, Board of Directors and committee volunteers for all of your hard work, dedication, time and never failing efforts which contributed to the ARMA Terra Nova Chapter achieving its goals and increasing IM Awareness and Education.*

*Paulette*

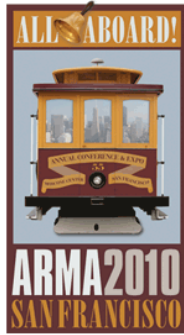
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## **Newsletter Editors**

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## ARMA International Conference & Awards Ceremony - San Francisco, California

By Paulette Crowley

I was very fortunate to be able to attend the ARMA International Conference, the ARMA leadership day and awards luncheon in San Francisco. What a wonderful learning experience and networking opportunity. Newfoundland and our local chapter were very well represented at the conference. The Terra Nova Chapter was recognized at the ARMA Awards Ceremony with a Member Recruitment Award as was Helen Norman, Terra Nova Chapter Member of the Year. Well done! We have had a fantastic year and should all be very proud of our accomplishments. Congratulations to all the Canadian members who received awards, including ARMA Canada who received the Region Website of the Year Award.

### Chapter Website of the year - Medium Category Atlantic

Chapter - Bonnie Gallant, Webmaster

### Member Recruitment Award

National Capital Region-Ottawa Chapter – 2 new members  
Newfoundland - Terra Nova-St. John's Chapter – 7 new members  
Prince Edward Island Chapter – 2 new members  
Saskatchewan Chapter – 2 new members  
Southwestern Ontario Chapter – 16 new members  
Toronto Chapter – 14 new members  
Vancouver Chapter – 29 new members  
Vancouver Island Chapter – 1 new member

### Chapter Leader of the year

Prince Edward Island Chapter – Deborah Gillespie  
Toronto Chapter – Irene Gelyk, CRM  
Vancouver Island Chapter – Jon Weston  
Winnipeg Chapter – Fred Coakes

### Chapter Website of the year – Very Large Category

Toronto Chapter (Honorable Mention) - Danielle Carbert, Webmaster

### Chapter Member of the Year

Atlantic Chapter – Patricia Hughes  
Calgary Chapter – Barbara Bellamy  
Montreal Chapter – Simeon Ivanov, CRM  
Newfoundland-Terra Nova Chapter – Helen Norman  
Prince Edward Island Chapter – Mark DeMone  
Saskatchewan Chapter – Audrey Hall  
Southwestern Ontario Chapter – Wendy Francis  
Toronto Chapter – Marc Grysiuk  
Winnipeg Chapter – Denys La Riviere

### *ARMA Canada is the Region Website of the Year*



*The ARMA International Conference offered an abundance of fantastic educational sessions, an opportunity to network with other RIM professionals and a chance to check-out the latest technology at the vendor expo. Of course, there was also time to take in some of the local sites and tourist attractions with many of the other ARMA members too!*



*A beautiful morning at the Golden Gate Bridge with some ARMA friends our way to a tour of Napa Valley post conference. Front row: ARMA Terra Nova - Elizabeth Evans, Paulette Crowley and Brenda Prowse and Doug Allen, Past President, ARMA International. Back row: Nick De Laurentis President, ARMA International.*



*...No trip to San Francisco would be complete without a ride about town on a street car!*



*ARMA Canada hosted a hugely popular party during the conference at which Bernita Cogswell, ARMA Canada Region Manager (a.k.a. "Mother Goose") presented the ARMA Goose Pin to several ARMA Members. I was very surprised and honored to be presented with one.*



*A lovely dinner was enjoyed with some old and new ARMA friends after a busy day at leadership.*



## TIPS AND TRICKS FOR RECORDS Management

Have you ever wondered what to do with your income tax assessments? You really don't use them on a regular basis. It's not like every day you need to check what your net income was for last year! But it is something you might need 'for future reference'. So, what do you do with it? How long do you keep it? Who needs to see it? Where do you put it? Can you leave it on your countertop? The junk drawer? Or the small filing cabinet you bought but never used? This is Records Management!

We all have information lying around, whether it's at our home, or at work, on our countertops, junk drawers, desks, etc. As the resident Information Management Analyst at Elections NL, here are some Tips and Tricks for Records Management.

Personal Information... Privacy Legislation has put the fear in most people. But relax, it's really very simple, protect it! Don't leave your social insurance number on the desk. **Tip:** Put it in the drawer! If you can, lock the drawer!



So you got the hint, clean off the food stains and put the tax assessment in the cabinet.... Now, what do you name the file? Here's a hint, keep it simple, call it Tax Assessments, and don't put it in the folder named 'Vacation 2011'. **Tip:** Name the file after its contents.

Now that you're cleaning out your junk drawer, you discover 10 years of phone bills and the confirmation of payment you printed from your Online Banking. Just because you need to keep your tax assessments for 7 years, doesn't mean you need to keep proof that you paid your phone bills 5 or 10 years ago. **Tip:** If you don't need it, don't keep it! But if you're unsure, get advice. Just remember some laws will apply so check with your Records Management representative.

- Vanessa King  
Vice President  
ARMA Terra Nova



came up overnight. Regardless, by setting up

## 14 Steps You Can Take To Manage Your Inbox Better

Most organizations don't manage their email very well – and there are a number of white papers out there about how to archive everything, or how to manage email messages as records, or the value of outsourcing email, etc. But very few of them address the reason why email is so out of control – us! Most of us don't use email very effectively, whether on an individual message basis or in managing our inboxes. So the focus of this article is on steps you can take to be more effective in how you use email.

### Individual steps

1. **Close your email client.** The vast majority of us keep our email client open all day long, just in case an important message comes in. This leaves us vulnerable to distraction every time a message comes in, whether it's that important note from the boss, an invitation to a webinar that may or may not be of interest, or an update on next week's potluck.
2. **Turn off alerts.** If you can't close your email client you can minimize it, but it doesn't help if it pops up an alert every time one of those messages comes in. So turn off the alerts. If you don't want to turn them off completely because you might miss an important email, set up specific alerts for, say, messages from your boss or the project team you're working with. And turn off the rest of the alerts.
3. **Set specific times to check your email.** Some argue NOT to check your email first thing in the morning - because you'll look up and find you've already wasted hours on it. Others insist they have to check it first in case something urgent

times and adhering to them, you'll greatly reduce the distraction of email.

4. **Touch each message only once.** This is the hallmark of the email management = time management movement as espoused by David Allen's [Getting Things Done](#), Merlin Mann's [Inbox Zero](#), and many others. The point is to act on a message when you get it: file it, respond to it, take action related to it, defer it, delete it, etc. The usual caveats about records management



apply; the point is that you don't keep all your email in the inbox until it becomes too overwhelming.

5. **Reduce the amount of bacn you consume.** [Bacn](#) is a term coined in 2007

to describe "email you want, but not right now." It refers to updates from vendors, announcements from your local AIIM chapter, the Dilbert cartoon-of-the-day, etc. It's not spam, but if you can't get to it, it won't directly impact your job.

6. **Set up rules and filters.** Positive rules can be used to draw your attention to an important message – for example, when you receive a message from your boss or the project team, the email client shows an alert, puts it in a special folder, or even opens it so you can't miss it. Negative rules can be used to keep stuff out of your way – for example, by setting up rules to



move messages from the RECMGMT-L email list or your mom's jokes into special folders.

7. **Don't use email as a filing cabinet.** Too many of us keep all of our email because that's where our documents live - as attachments. Some will even



email documents to themselves, creating attachments in order to save them in the email system. Email systems are designed to send, route, receive, and store

messages for short periods - they are not designed to be the final repository for information. The more email stored, the worse the system performs, which is why email archiving was initially so popular. They are not designed to optimize findability. And it is extraordinarily difficult to use them to manage messages that should be treated as records. Finally, many organizations still have mailbox size limits, and when that limit is reached because of the volume of attachments stored, too many users simply delete by size rather than by value or importance.

Note that this is a good transition because it's an organizational issue as well.

#### Organizational steps

8. **Update the policy.** Many organizations have policies that address appropriate usage – for example, they prohibit sending racist, sexist, or other offensive materials through email. But there are a number of other things the policy can and should address, including legal issues, effective usage, encryption and

security, personal email accounts, and many others. And it should go without saying that this will also require that users be trained on the policy and how to comply with it.

9. **Be realistic.** There are often two problems associated with effective email management. First, the organization tries to do too much at once. Just as a records program cannot go from a standing start to world class overnight, an email management initiative will have a lot of moving parts. Many of these will be analogous to the records program: development and implementation of a classification structure, development of a governance framework, selection and implementation of technology, training, etc.

The other challenge is that users are not professional information managers. Too often the organization decrees that users will manage their email appropriately, and then implements a process that requires users to click ten times, fill in 27 metadata fields, and take 30-60 seconds or more to classify a message. This is hard enough for the handful of documents users create in a day; it's all but impossible for the 100-150 or more messages users receive. Do the math – at only 30 seconds each, this is 50-75 minutes a day *just to classify messages*. The process of managing email should be made as absolutely simple as possible: streamline classification schemes, use technology to hide irrelevant “buckets”, and integrate email management or records management tools into the email client in such a way that the users don't really notice. All of these will make it more likely that users actually comply with the program.

10. **Reduce colleague spam,** both what you send and what you



receive. This means paying attention to the CC: and especially BCC: functionality. Consider whether someone really needs to be informed of the contents of the message or if it's just an exercise in covering yourself. This is especially true when it comes to the "Reply All" button, which is so abused that some organizations have taken the step of configuring their email systems to turn that capability off. If your staff CC's you on everything, consider whether you actually read those CC'ed messages.



11. **Reduce attachment spam.** Just as not everyone in the organization needs to receive a copy of a given message, not everyone in the thread needs to receive all the attachments associated with the thread. Attachments can take up a lot of space in the inbox; more importantly, as attachments proliferate it becomes increasingly difficult to determine which one is the most current. One way to address both of these concerns is to send links rather than attachments.
12. **Use meaningful subject lines.** Blank subject lines often end up in the Junk Mail or Spam folder. But too often the subject line is either very generic, such as "Stuff", "Friday", "Our discussion from yesterday", etc. – or it's the same subject line from 20 messages ago, even though the focus of the discussion has changed several times in the interim. Almost all email clients can follow threads without keeping the subject line the same. Better subject lines also lead to better responsiveness because the recipient can determine how quickly a response is needed and can be provided. And better subject lines make it easier to locate a message later should it

become necessary.

13. **Use the right tool for the job.** Email is a horrible tool for most of the uses we put it to. Consider how users collaborate through email: it's a flurry of attachment spam, "did you get my email?" messages, "which is the right version?" traffic, etc. Wikis are much better tools for collaboration. Or consider all the broadcast-type announcements you get, whether from vendors, your HR staff, or your friendly neighborhood association chapter. Blogs (and more recently Twitter) are a great way to stay informed about that type of information without having it clutter your inbox. That's how I get my information. It's not that email is a bad tool - it's just that what it's really good for is one-to-one or one-to-few communication. Use other tools for other uses.
14. **Implement email management technology.** There's a reason this is the last in the list. Without all the other things already mentioned, technology will only give the organization a false sense of security and may actually make it more difficult to manage email effectively. It's also important to know exactly what the technology can and cannot do and how it does it. Just because a solution claims to archive all emails and produce them when needed, it does not mean that the solution is easy to use, integrates with the records management application, or can be accessed by all clients and devices. Due diligence and research is vital here, as is determining the organization's business and functional requirements.

- Jesse Wilkins, CRM

Director, Systems of Engagement at AIIM International  
[jwilkins@aiim.org](mailto:jwilkins@aiim.org)





## Implementing a Clean Desk Policy in Your Organization

Take a moment to look at your immediate work surroundings. Do you have an in/out basket? Do you have a drawer filled with paper files? Do you have documents open on your desk that you are presently working on? If you answered yes to one of the questions above, you're organization may need a policy in place to help protect paper records. A simple way to protect paper records that contain sensitive information is to implement a clean desk policy. A clean desk policy will help establish a culture of security, trust and create a positive company image for when clients or customers visit your organization.

The first step when developing the policy is to ensure you have executive support. As we know, this is key to the success of any information management or information protection project. The next step is to determine the purpose, scope, responsibility, actions and enforcement of the policy. The following are examples of measures your organization can take: When an employee leaves their office, they should close their office door (if the office is equipped with a door);

When sensitive documents are not needed, they should be secured in a locked drawer or cabinet; Sensitive documents should never be left unattended, even for a short period of time; Confidential documents to be shredded must not be left in the blue recycle bins; they must be stored in a secure place until they are shredded;

In the event an employee is working on a sensitive document and another individual enters into their office, the document should be covered or placed in a folder; and  
At the end of every work day, all documents should be secured.



To help you develop a clean desk policy for your organization, consider conducting a search on the internet. There are lots of great resources to help you and give you ideas.

- Kim Anstey  
Director at Large  
ARMA Terra Nova

*Have an idea for a Lunch & Learn Topic or even an event for Records Management Month?*



*We would LOVE to hear from you!!*



# Records Management



## Records Management is:

- ❖ Helping in ways you never imagined.
- ❖ Preserving our past, providing access to our future.
- ❖ Preserving the past, preparing the future, protecting the present.
- ❖ Preserving yesterday, managing today, preparing for tomorrow.
- ❖ Ensuring the future by preserving the past.
- ❖ Ensuring access to essential information.
- ❖ When you absolutely need to know where it is.
- ❖ Just saying "No!" to chaos.
- ❖ Collate, fold, spindle, mutilate, and shred.
- ❖ Knowing what to throw away.
- ❖ Never having to say you are sorry.
- ❖ Like an elevator - you do not notice it until it is not there.
- ❖ Like oxygen, no one ever notices it unless it is missing.
- ❖ Like a life preserver; you never think you will need it but....
- ❖ Increasing efficiency, reducing costs.
- ❖ The only profession that knows in advance what it is going to forget.



## Need a change?

<http://www.armacanada.org/positions.shtml>

<https://www.hiring.gov.nl.ca>

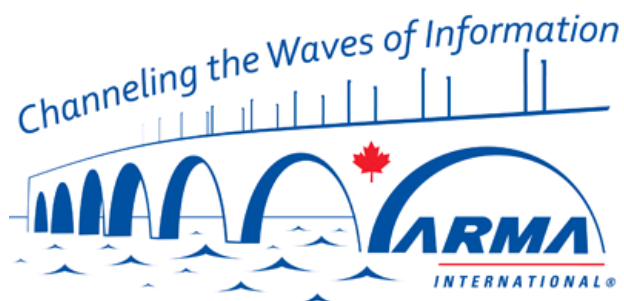


*Have an article lying around?  
Contact Us:*

ARMA Terra Nova Chapter  
P.O. Box 23061  
RPO Churchill Square  
St. John's, NL  
A1B 4J9



## Upcoming Events



# ARMA EXPO 2011

ARMA International • 56th Annual Conference and Expo  
October 17-18, 2011 • Gaylord National Hotel & Conference Center • Washington, D.C.

## Check Out


<http://events.linkedin.com/records-management>

to find a great list of upcoming events!!!!





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### Chapter Newsletter Advertising Rates

Reach the people who manage and use the information management products and services. Advertise in the Terra Nova Times newsletter. Great rates make it affordable to reach hundreds of people in the records management industry.

Advertising Rates are as follows:  
Full Page - \$75.00 per issue  
Half Page - \$50.00 per issue  
Quarter Page - \$40.00 per issue  
Business Card - \$25.00 per issue

Contact us for further information.

*This space is available for advertising.*

*Call or email the Board today!*

### INTERESTED IN BECOMING A MEMBER?

Helen Norman is the right person to answer any questions regarding membership.

Go to <http://www.arma.org> to download a membership application.

Be sure to join our local ARMA Terra Nova Chapter too!

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### Disclaimer

This newsletter is published on a quarterly basis. The content is offered as a source of information only and does not necessarily reflect the views of the ARMA Terra Nova Board of Directors, ARMA International, or the editor(s).

### Deadline for Submission

All articles and advertisements are to be submitted in electronic format by the 15<sup>th</sup> day of the month preceding publication.

