



Central Kansas *Sun*

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Feature Article

Today's Blessing and Curse: Corporate Email *Email Importance and Volumes Pose Records Management Challenges*

By: Robert Smallwood, IMERGE Consulting



Email has become the business communication mode of choice. In a recent survey by IMERGE Consulting, more than 60% of information technology (IT) and business professionals named email as the most critical enterprise application, well above the next choice, database transaction processing (36%). In addition to the fantastic business

benefits of email, it has become an overwhelming task to manage. Things stated in the heat of battle have come back to bite managers in compliance, governance and litigation proceedings. No one is immune: Executives in business, the media and government have been heavily fined and even jailed for what they've written in email messages.

Managing email records has become pivotal to supporting compliance, governance and litigation efforts and this poses new challenges for today's records managers. Managing email messages and attachments, and the potentially damaging content they contain, means that records managers must educate themselves on electronic records issues and especially those that are related to email.

There are groups of vendors that provide electronic record management (ERM) software and there is a whole different group that provides EMM and email archiving software. Some have fundamental ERM capabilities built in, but most don't, so there are integration issues that arise. Some provide hosted archiving services, some are in-house solutions and some EMM providers offer both choices.

Key questions loom: Are all email messages a record? Can email messages be sent confidentially with no record? Should the file plan for email be based on the age of the message or its content? Records managers are going to be expected to know the answer to these types of questions.

This starts with an electronic communications policy. Policies must be formed and new technologies must be deployed to manage email content *before* it enters or leaves an organization and renders it out of compliance with regulations or governance policies. Most organizations have an e-policy, but it is often not complete or up-to-date and comprehensive to include new communication modes like blogs, wikis and RSS newsfeeds. Regulatory requirements dictate that email messages and their attachments be preserved for significant periods of time, usually five to seven years.

(Continued on page 6)

"Cheers to a new year and another chance for us to get it right."

~ Oprah Winfrey

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President's Message

By: Laurie Carpenter, CRM

It is hard to believe, but we are nearly mid-way through the second year of the Central Kansas ARMA Chapter. John Downs, our November meeting speaker with his session titled: "Lessons Learned: What to look for when implementing an Electronic Records Management Application" proved to be engaging and informative. The nearly 1/2 hour of questions during the session demonstrated that this is a hot topic.

As we are in the midst of the holiday season, there is much to be thankful for. On the Records & Information Management (RIM) front, we are blessed by having the local Central Kansas Chapter that is providing much needed quality local education in the area of RIM. The sessions have gotten consistently favorable remarks and we are looking forward to our January 8th meeting on Data Privacy, our annual Spring Seminar on March 11 and our May 13th session on Data Security. We have proven the need for this kind of organization in the Central Kansas area and I think our board and volunteers are proud to be a part of it. We are also lucky to be under the umbrella of ARMA International and be able to take advantage of their quality educational sessions and publications.

I didn't start off my career planning on being in the RIM profession, it just "happened". I was extremely fortunate to have learned about ARMA and got involved in my then local ARMA Chapter (the Bellevue/Eastside Chapter). Several experienced ARMA members took me under their wings and guided me through the complicated maze of putting together a complete records & information management program. Over the years, I have discovered that this ever changing profession provides lots of opportunities for exploring new ideas and ways of doing business. If your company is just starting on it's RIM adventure, I hope that the CK Chapter provides you not only with networking opportunities, but opportunities to find RIM mentors. For those more experienced chapter members, sharing your knowledge with those newer to the profession goes a long way! Plus, you can learn new ways of handling issues from our new members who may provide a new perspective on things. I sincerely hope that you all take advantage of the networking available to you.

May the rest of the holiday season find you warm, safe and happy!

Laurie

ARMA-CK News

Call to Action: CK Treasurer Needed

We are saddened to report that Debbie Stovall will be unable to complete her tenure as Central Kansas Treasurer. The chapter is in desperate need to fill Debbie's position as quickly as possible. We MUST have a Treasurer to be able to function as a chapter. We have been pleased to provide the central Kansas area with quality educational sessions in the area of records and information management and we would like to continue to do so.

We are looking for someone to be willing to volunteer just a few hours a month to fill this critical position.

Central KS Leadership

Laurie Carpenter

President
316.828.8584

Jim Mullen

Vice President
316.526.0069

Peggy Nikkel

Secretary
620.662.6769 ext.
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316.305.8284

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Coordinator*
316.749.4416

Sheri Naegele

Newsletter Editor
316.828.7281

ARMA-CK News (cont'd.)

Treasurer's duties: The chief financial officer and custodian of funds, securities and any other assets; signs all checks for disbursement of Chapter funds; receives all membership dues and other payments to which the Chapter is entitled; assures the deposit of all funds in depositories approved by majority vote of the Board of Directors; provides statements and audits of the financial condition of the Chapter at the close of each fiscal year and at such other reasonable times as directed by the Board of Directors; prepares and files financial reports required by law.

Please consider stepping up to the office of Treasurer for the Chapter. This vital Board position is necessary for the continued Chapter operation. Please feel free to contact Laurie Carpenter 316-828-8584 with questions about this opportunity

ARMA-CK Treasurer's Report



Central Kansas Chapter Treasurer's Report

Submitted by Debbie Stovall, Treasurer
November 30, 2007

Balance as of 10/31/07	\$ 6,162.91
INCOME:	
Contributions, Gifts, Grants	\$ -
Membership Dues & Assessments	35.00
Interest	11.19
ARMA Grants	-
Seminars & Meetings	366.00
Scholarship Fund	38.00
Special Projects	-
Annual Spring Seminar	-
Newsletter Subscriptions	-
Advertising Revenue	-
Other Revenues	-
Total Income	\$ 450.19
EXPENSES:	
Contributions, Gifts, Grants	\$ -
Accounting Fees	-
Legal Fees	-
Printing & Postage	-
Supplies	-
Travel	-
ARMA Int'l Conference	-
Dues	-
Seminars & Meetings	-
Special Projects	-
Library	-
Other	-
Paypal Fees	8.93
Post Office Box	-
Web Hosting	-
Kansas CRE	-
Misc (Drawing)	-
Total Expenses	\$ 8.93
Balance as of 11/30/07	<u>\$ 6,604.17</u>

Central Kansas
Chapter, ARMA
International

PO Box 1397
Wichita, KS
67201-1397

Visit us on the web!

www.arma-ck.org



Calendar of Events

Tuesday, January 8, 2008

Central Kansas Chapter Meeting

Topic: Data Privacy

Presented by Don Martens, The Boeing Company

Many organizations are under the microscope to protect personal and business confidential information. This presentation will address what is elevating the visibility, how to analyze the situation and steps to mitigate the risk.

Registration: 11:15 AM – 11:30 AM

Lunch: 11:30 AM – 12:00 PM

Presentation: 12:00 PM – 1:00 PM

Hinkle Elkouri Law Firm L.L.C.

2000 Epic Center – 301 North Main**

Wichita, KS 67202

[Map](#)

Menu

Entrees:

Marinated Grilled Chicken

Beef Brisket

Sides:

Roasted New Potatoes

Chef's Blend Vegetable Medley

**This meeting will be held in a conference room on the 22nd floor, take elevator to the 20th floor, then 2nd elevator to 22nd floor. The parking lot is \$2 a day, \$1 half a day. The parking garage is 75 cents for each half hour up to \$4.00 all day. There are also meters on the street. There is plenty of parking in the area; however, we are unaware of any close free parking.

REGISTER TODAY! Deadline to register is **Wednesday, January 2, 2008**

[Register for meeting and pay via cash/check](#)

[Register for meeting and pay via credit card/PayPal](#)

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Calendar of Events (cont'd.)

COMING THIS SPRING!!!

Tuesday, March 11, 2008

Central Kansas Chapter Spring Seminar

Crestview Country Club

Additional details available in January

Tuesday, May 13, 2008:

Central Kansas Chapter Meeting

Topic: Bypassing the Best Laid Plans – How they Steal Proprietary Information

Presented by John Mallery, BKD LLP

Registration: 11:15 AM – 11:30 AM

Lunch: 11:30 AM – 12:00 PM

Presentation: 12:00 PM – 1:00 PM

Additional details available in January

Membership Information

Why become a member of the Central Kansas ARMA Chapter and ARMA International?

EXPERTISE

- ARMA Bookstore with more than 200 member-discounted RIM resources, including books, software, and videos
- Annual conference and Expo provides dozens of educational sessions
- The Information Management Journal featuring in-depth articles by leading RIM and Knowledge Management experts.

CONNECTION TO A GLOBAL NETWORK

- Local chapters to connect you to professionals in your area
- International chapters and members connect you to a global perspective on RIM
- Online member search to provide you with a global connection to your colleagues
Electronic access to information, tips, and guidance from the ARMA member forum

PROFESSIONAL DEVELOPMENT

- Online courses and web seminars
- Career search and resume posting services
- Leadership opportunities at the chapter and international levels

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Membership Information (cont'd.)

Membership Options	Annual Fee
Central Kansas Chapter and ARMA International	\$205
ARMA International Only	\$175
ARMA-CK Student Membership	\$10



Join on-line through ARMA International!

<http://www.arma.org/join/apply.cfm>

If you are already an ARMA member and want to join the chapter prior to your annual renewal, please contact our Membership Chair, Abbe Murdock, at (316) 305-8286 for pro-rated membership rates.

Advertising Rates

The Central Kansas Chapter of ARMA International has excellent advertising opportunities; the chart below outlines the pricing structure. To advertise in the newsletter or for more information, please email [Sheri Naegele](mailto:Sheri.Naegele@arma-ck.org).

Full Page (Platinum)	\$250/yr
1/2 Page (Gold)	\$150/yr
1/4 Page (Silver)	\$100/yr
1/8 Page (Bronze)	\$50/yr

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Feature Article (cont'd.)

(Continued from page 1)

Regulatory requirements dictate that email messages and their attachments be preserved for significant periods of time, usually five to seven years. This varies somewhat by state and by industry. Email management and archiving software capabilities not only save these electronic messages, but also provide the ability to search and retrieve messages and attachments based on their content for use in compliance, governance or litigation (discovery) efforts. Search capabilities range from very basic searches for key words to searching for phrases and even words and phrases that use synonyms by employing a built-in thesaurus capability. Specialized fields such as medicine, chemistry and law require that industry-specific definitions are recognized by using a dictionary and thesaurus of vertical market-specific terms.

In addition to basic search and retrieval capabilities, these functions within email archiving software help organizations comply with broad regulatory demands by: 1) preserving the original message format on a storage medium that is unalterable; and, 2) calculating the proper length of time for saving different types of messages, based on their date of creation, department or user and often the content within the messages.

Archiving email messages and attachments, Instant Messages (IMs) and collaborative communications (also known as groupware) simply preserves these e-communications, but does not, by itself, aid in the enforcement of corporate governance policies or federal regulations. That is where more sophisticated email management software, which *can* stop wrongful e-communications from entering, exiting or being circulated through the organization, comes in to play.

Most everyone is familiar with spam filters that stop unwanted email from entering the organization. But email management software can actually monitor and quarantine suspect messages for review before they leave or circulate through the organization and possibly cause a violation in governance or regulatory requirements. This active monitoring of outbound email is a growing trend and is called Outbound Content Compliance (OCC).

Using OCC capabilities, firms set up their list of watch words, phrases and recipients to ensure that nothing leaves the bounds of the organization that could potentially cause a violation. These watchwords and definitions are not only industry-specific, but also they must be customized to be organization specific, based on established corporate governance policies.

Today's records managers can gain a career edge by keeping up-to-date on these and other issues related to managing the electronic records of email messages.

For more information on email policy formulation and email management software, see the newly-released Management Primer on the topic at: <http://www.imergeconsult.com/news.php>

Robert Smallwood is a Partner with IMERGE Consulting specializing in email management topics. He is the author of over 100 articles on Information Technology topics and the upcoming book, *Taming the Email Tiger*. He may be reached at robert.smallwood@imergeconsult.com or 504-324-2340.

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