



Meeting: Wednesday, November 16, 2005, 11:30 to 1:30  
**Location: Marriott Courtyard—Kearny Mesa**  
 Reservations - Contact Linda Maczko @ (858) 534-3995  
 On-line RSVP: [http://www.sandiegoarma.org/arma\\_registration.htm](http://www.sandiegoarma.org/arma_registration.htm)

## ***Do You Know Where Your Data Is?***

### ***Storage, Backup & Disaster Recovery***

# Off the Record

Volume 43, Issue 2

November 16, 2005

**D**o you know where your data is? The location of your electronic data can be elusive. It often ends up in places you don't know about and can find itself in danger before you're aware of any threat.

**Have you ever heard of a hard drive crashing?**

In a many instances, users found out the hard way that some of their files hadn't made it on to a regular backup.

Not only does today's records manager need a solid knowledge of records management principles but also must possess a basic understanding of the technologies that are deployed in managing an organization's records. Most companies today are faced with an abundance of data that must be retained, easily accessed, and secured. However, this growth is happening so fast that records management issues are not being addressed. The records manager needs to be able to intelligently discuss and contribute to the organization's data storage strategies including assessing the appropriateness of storage devices housing records and the associated backup policies and procedures.



Our seminar will present you with the basic knowledge you need to begin understanding data storage, backup and disaster recovery. The following areas will be addressed:

- Business storage challenges
- Storage technologies and practices you should know
- What you should be asking your IT department
- Storage Solutions

***Our Featured Speaker:***

Jim Heiden  
 Iomega Corporation  
 Product Marketing Manager  
 Professional Storage Solutions

Mr. Heiden's extensive professional background encompasses a full range of experience in the storage indus-

try. Prior to joining Iomega as a Product Marketing Manager for professional products (NAS and REV), Mr. Heiden gained a broad base of storage experiences as a Product Marketing Manager for Adaptec, Inc., a leading provider of storage solutions. At Adaptec, Mr. Heiden managed SCSI, SATA, SAS, and iSCSI HBA and RAID controller product lines as well as developing Adaptec's services organization for the External Storage market. Mr. Heiden graduated from the University of California at Davis, majoring in environmental biology and management.

**WHO SHOULD ATTEND?**

Business and government records managers and decision-makers who want to learn about data storage infrastructure and how to ensure that it is properly stored.

**MEETING AGENDA**

- 11:30 - 12:00 Registration and Networking
- 12:00 - 12:15 Announcements
- 12:15 - 1:30 Lunch and Presentation

*Please register early, as seating is limited.*  
 RSVP to Linda Maczko via phone 858-534-3395 or [lmaczko@ucsd.edu](mailto:lmaczko@ucsd.edu).

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# Sites Every RIM Professional Should Know

## Off the Record

Association of Records Managers & Administrators  
San Diego Chapter

Editor

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*Off the Record* is a semi-monthly newsletter of the San Diego Chapter for the Association of Records Managers and Administrators.

This newsletter is published to inform the members of activities of the Chapter, and disseminate news and opinions of Board Members, or Chapter Members. Opinions are those of the author, and do not necessarily reflect official policy or opinion of ARMA, the San Diego Chapter of ARMA, or its members. Your statements and articles are solicited.

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## President's Message By Cynthia Lacy

It's hard in this day and age with corporate downsizing to keep up with everything one should read to keep up with one's job duties especially when many times, one is required to put on yet another hat. I'm going to use my space this time for an article that should be printed out and kept for reference for every

Records Manager, CIO, or even application analyst who supports a records management system. Happy Reading.



Two myths surround the internet: "Everything that's any good is on the Internet" and "Everything on the Internet is good." Long-term users of the Internet realize that these notions are hardly realistic. Navigating millions of Web pages to determine which sites contain credible, usable, accurate, and up-to-date information is a daunting task. Below is a categorized listing of various sites that offer excellent resources for records and information management (RIM) professionals.

## RIM Gateways

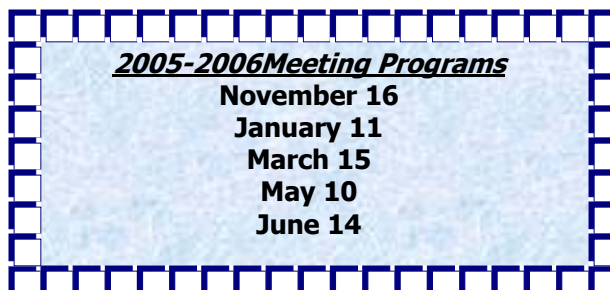
**Records and Information Management Resource List**, <http://infomgmt.homestead.com/files/websites.htm>

This site, developed and maintained by RIM practitioner Alan S. Zaben, is a virtual and electronic encyclopedia of the RIM domain with its inclusion of some 5,000 links in 315 categories. When Zaben finds—or has reported to him—what appears to be a useful Web page, he reviews, categorizes, and adds it to this site. Thousands of information-rich Web sites are cataloged, and it should be a beginning point for Web-based, RIM-related research. Included here are international opportunities in RIM education, electronic issues of every flavor, ethics, jobs, information technology law, knowledge management, and privacy. At this writing, there are 35 links to document imaging, 223 links to RIM-related magazines, and even a link to the archives of Tasmania.

**The Archives of the Records Management Listserv**, <http://lists.ufl.edu/archives/recmgmt-l.html>

After Zaben's site, one of the most useful sites on the Internet is the searchable archives of the records management listserv. This site is the repository of the discussion of records managers worldwide on many topics dating back to March 2000. If a question has been posed or a topic explored, the answers are there—often offered by some respected people.

A real gem  
RIM practitioner  
"Records and  
News" (RAIN)  
records man-  
archives news



ness.  
of this listserv is  
ner Peter Kurilecz's  
Information in the  
postings. RAIN is a  
agement and ar-  
service with cur-

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# Taking the Search Challenge

The white-collar worker exclaims in frustration when he can't find what he is looking for on his PC. Blame it on email, and the proliferation of electronic information in a host of forms from shared documents, text messages, and mounds of information packed away in data warehouses and specialty applications like CRM (customer relationship management) software.

"Search is a critical issue and the positive user experience Google delivers has driven expectations in enterprises that search should work better, faster, and easier," said Whit Andrews, research director at IT research and advisory firm Gartner, Inc. "The 'why can't I have my intranet search work as well as Google?' is a familiar refrain now."

Research by Gartner suggests that only recently has "grassroots knowledge management" been recognized by the enterprise. IT departments need to support burgeoning numbers of employees who work on the fly: telecommuting, traveling, or other mobile situations. These individuals perform "personal knowledge networking" where networking, knowledge sharing, and collaboration are required to compete in business today. But, only if they can put their fingers on the information they need when they need it.

Moreover, even those workers bound to their desks in dedicated offices supported by rich IT infrastructures, the search issue has largely been ignored. "About two years ago, companies started to wake up to this. The problem lies in email and hard drives," said Jared Spataro, director of collaboration and knowledge management solutions of Open text, ECM solutions provider.

Spataro noted requests to Open Text for solutions in this area during the last several years were relegated to single departments like legal or product development. Now, entire enterprises are requesting solutions to corral email and day-to-day documents into single-point searchable applications. "Enterprises want to manage, organize, and search the information, but it has to be transparent to users," he said.

The time it can take to find business-critical information, whether on servers, the desktop, or PDAs is a proverbial black hole. A survey (available online at [www.delphigroup.com](http://www.delphigroup.com)) conducted by technology consultancy Delphi Group polled 450 business users at companies worldwide. Not surprisingly, respondents said they spent a significant part of the workweek pursuing information: about 42% reported 20% or more of their workweek is spent seeking information. Another 31% of respondents said they spent between 10% and 15% of their time each week looking for answers or facts electronically.

## Search: New Frontier in ECM

"The last decade or so has been focused on the central repository issue. Enterprises are still wrestling with 'Why are we still losing content?' and 'What's the best way to do this?'" said Carl Frappaio, executive vice president of Delphi Group.

He estimated that only about 30% of U. S. companies are properly addressing the search issues on servers. "We're starting to see the dust settle, and coupled with the litigious high-risk environment businesses live in today, organizations are starting to pay attention to it now." Only a few firms are beginning to address the desktop or C drive.

Given the highly personalized and prolific nature of email, Frappaio said enterprises are starting to plot ways to manage email from the repository and search perspectives.

"Suddenly, here's this corporate tool, but for most companies, there's very little rules regarding how you use it, where you save, and how you delete it."

"The volume of unstructured text available in systems like email and other private content is much larger than what the Web has indexed to date which is about 170 terabytes and

this amount excludes another sizeable portion, considered the Deep or Hidden Web (non-indexed Web)," said Sanjeev Srivastav, vice president, Professional Services at Stratify, Inc., an ECM provider of unstructured information management software. He pointed to estimates compiled by MIT Technology Review suggesting that emails generate about 440 terabytes annually. Combined with other private data like office documents, intranets, and text messaging, the volume of enterprise content is staggering.

"That's been our challenge: to develop strong technology to organize and analyze very large collections, yet to keep the user tools very simple," Srivastav said. The company's software helps corporate users like attorneys, the federal government, and information providers organize and sort email, documents, Web pages, and other electronic information, scouting for common traits and sorting them into searchable files. "You can't put complex software in front of an attorney, for example. You need powerful, simple tools, like an email software," he added.

Admittedly, the task of organizing massive amount of enterprise and individual desktop content while creating classifications to create searchable data repositories is daunting. The good news is taxonomy, that is, specific classification hierarchy, is being built into solutions and becoming increasingly sophisticated, suggested Rita Knox, Gartner analyst. "Search and taxonomy technology is pretty good now. In fact, we're seeing taxonomy and search come together where companies can even slant it toward certain results (to fit their needs and industries)."

Knox said enterprises have recognized the need to manage revenue-generating documents by managing them, often on central servers, offering indexing and searching. (Indexing or classification features are a flat collection of subject areas or folder.) She pointed to ECM solutions by FileNet, EMC (Documentum), IBM, and Open Text as filling this need while

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# Taking the Search Challenge

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offering the critical search function. "These solutions have search engines around them and they're starting to have taxonomy," she said. The price to classify and search documents isn't cheap. For smaller companies, Knox suggested, the cost of these enterprise solutions can be prohibitive, but certainly are worthwhile for companies with revenues in excess of \$10 million.

*Experts consulted for this article said few enterprises have formal ECM policies in place from a desktop perspective. Lack of guidelines around this content, coupled with the search issue, raises a Pandora's box of problems.*

Stratify basically revs up other solutions to make search capabilities particularly potent. Stratify devises solutions pertinent to specific industries as well as large aggregators of information such as Dialog, a research database provider. "Our technology works in conjunction with search software, such as Google on the Web, or FAST and Endeca on the enterprise side, to provide metadata (information about data) and concept-based organization," Srivastav said. Using the legal industry, for example, Stratify software aids the discovery process by searching many terabytes of information for relevant documents.

Delphi's Frappaolo suggested advanced enterprise search is a whole new frontier: enhanced capabilities include text analytics, classification, profiling, search, and improved delivery components. "These features, when combined with basic keyword searches, provide enterprises with ways to organize, file, and leverage their information assets into improved decision-making and increased productivity," he said.

When developing their ECM and search platforms, enterprises will be aided by solutions that employ XML (extensible Markup Language) technology, using the simple, flexible text format originally designed to address large-scale electronic publication. So XML can ultimately be used to address the search problem for non-Internet information stored on servers and hard drives. One such industry already embracing the technology is financial services. "XML, used to identify content in computer-processable ways, is used at the individual user level and that's picking up now," Gartner's Knox said.

## Searching the Desktop

It's the area of personal knowledge management - all the disparate data on hard drives and PDAs - which is the bugaboo. "Desktop search, or personal knowledge search, is hyped and hot right now because Google, Yahoo, and Microsoft (MSN) are turning up the Bunsen burner with their own desktop search applications," Andrew of Gartner said, adding, "but the ability or inability, to find information assets on a PC or in

a small network has been critical to knowledge workers for more than 20 years."

"The vast majority of installations of personal knowledge search tools are commissioned by individuals on their own behalf," Andrews said, referencing a host of free downloads such as by Google, Ask Jeeves and Copernic. "However, in specific verticals such as criminal justice, law enforcement, and legal support, established players such as ISYS and dtSearch are well entrenched and a much greater percentage of installations are enterprise sanctioned and supported."

## Opening Pandora's Box on the Desktop

Experts consulted for this article said few enterprises have formal ECM policies in place from a desktop perspective. Lack of guidelines around this content, coupled with the search issue, raises a Pandora's box of problems. What about storing personal information on business PCs or devices? What is an employee's or a firm's potential liability in permanently storing or archiving all desktop and mobile-device data into corporate archives? "When you look a C drives, people tend to think it's personal content. Employees say 'What do you mean I have to share it?'" Frappaolo said.

Of course many firms already automatically backup hard drives on company PCs. Some enterprises, Frappaolo said, also require employees to move any relevant emails and documents to project folders on the server. Here, backup is assured and collaboration is made easier with other employees for access to the information, but employees may not also go through the necessary clicks and hoops to do this.

Frappaolo predicted that within the next five years, enterprises will implement advanced search models while developing corporate policies around information generated on the desktop and mobile devices. "Companies will have a concept of information architecture and content governance models that will be far more prevalent," Frappaolo said, adding, "Management has to come out with a statement on governance of this information. It's not a technology decision; it's a business decision."

From both the server and desktop perspectives, Spataro of Open Text said enterprises have realized they need to deliver backup and search functions seamlessly to business users. "You create the repository on the back-end to do all of these things, but unless you go that last mile from the repository to the user's work environment, it won't be used."

"In the past, it's been about lack of updated documents," Spataro said. Solutions by Open Text such as its suite of email management solutions allow enterprises to automatically archive emails while lending the search function to users. Its Touchpoint solution facilitates collaboration by integrating archive and search capabilities as well as unifying various tools such as document sharing by work teams, text messaging, blogs, and Web conferencing. "Touchpoint reduces it to one click while other solutions we have take anywhere from one to six or so clicks," he said, noting that one study indicated 13 to

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# Taking the Search Challenge

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20 clicks are the norm for retrieving data out of enterprise repositories and uploading.

Gartner research found that improved technology support for the knowledge workplace will take on shortened implementation times because solutions will be pre-integrated and convergence around VoIP (Voice over Internet Protocol) connectivity is improving. Ultimately, it means improved employee productivity and ROI (return on investment) for the enterprise. By the end of 2007, Gartner estimates three-quarters of enterprise productivity gains will be attributed to knowledge management and other knowledge-work enhancements. You can count less headaches and worker aggravation from searching for information into the equation.

*Marcia Jedd is president of MJ & Associates ([www.marciajedd.com](http://www.marciajedd.com)), a marketing communications consultancy in Minneapolis. This article appeared in **AIIIM E-Doc Magazine**, March/April 2005, Volume 19, Issue 2.*



## Case Study: Behemoth Tackles Search

Even in the case of Fortune 500 companies with deep pockets, the quest for enterprise-wide search capabilities is elusive. One of Open Text's clients is such an enterprise, with 55,000 employees and more than \$25 billion in revenues. Last year, the company started the arduous process of implementing Open Text's solutions to migrate its enterprise content into searchable files, on a department-by-department basis.

Jared Spataro, director of collaboration and knowledge management solutions of Open Text, said the project encompasses more than 125 terabytes of content. Some 65% of its enterprise content was loose on email, primarily in Microsoft Exchange files, while another 35% of its content was housed in shared drives, including C drives. Before commencing the project last year, only about 35% to 40% of all its enterprise content was searchable. When completed, only a small percentage of non-searchable information will remain in the company's enterprise content.

Ultimate, employees of the company will be able to search business documents and email, performing full-text searches using key words, including more advanced Boolean searches on its vast files. "At Open Text, our hottest area has been on the email side in archiving and searching for Lotus Notes and Microsoft Exchange," concluded Spataro.

*By Marcia Jedd*



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# Build It So They Can Find It

It's 6:30 p. m. on a weeknight, and as you're headed out of the office you remember there's a few items you've got to pick up at the grocer store: tissues, corn flakes, and eggs. You dash into the store that's on the way - one that you shop at constantly, and thus know all its quirks - and go to the paper goods aisle for your tissues, the cereal aisle for your corn flakes, the dairy section for your eggs. You're in and out of the store in less than five minutes.

Taxonomies create massive efficiencies in our everyday lives, and yet we constantly take them for granted. Imagine trying to find tissues, corn flakes, and eggs in a grocery store without the classified aisles that guide you to the right place to find what you - the user, consumer, and/or customer - really need, efficiently and accurately. And yet, without taxonomies, businesses leave their customers to sift through huge collections of products and content without guidance, and their experience is not unlike looking through all the items in a grocery store in a futile attempt to find a box of corn flakes. Grocery stores are organized by major categories, sub-categories, and so forth, until we find the specific product we're after. Finally, after years of sub-optimal CMS implementations - where costly software was implemented without an adequate content architecture to support it - businesses are learning yet another lesson from brick-and-mortar product stores. Businesses need to create categorical aisles of their own.

## What Is Taxonomy?

Taxonomy is the science of classification and labeling, or more simply - a law for categorizing information. From the Greek taxis meaning "arrangement" or "division" and nomos meaning "law," a good taxonomy takes into account the elements of a group (taxon) and its subgroups (taxa) that are mutually exclusive and, taken together, include all possibilities.

For the purpose of a content management system implementation, the primary purpose of a taxonomy is to provide a framework for the categorization and tagging of content in the system, enabling the business to present content in a very specific ways, for specific sites, and eventually, target that content to specific audiences or individuals.

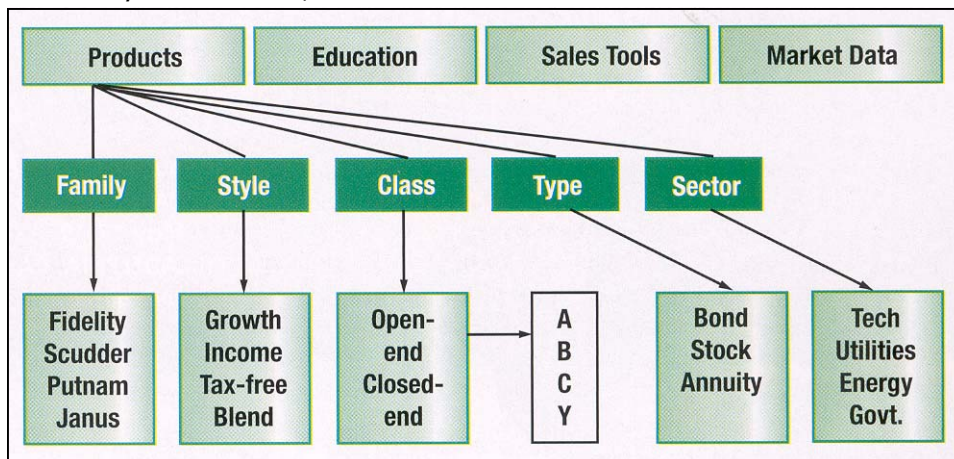
als.

Common taxonomies include the grocery store scheme cited earlier, the library's Dewey Decimal System, the Periodic Table of Elements, and Carl Linnaeus' classification of all of living things that you may remember from your high school biology (kingdom, Phylum, class, order, genus, species). Linnaeus' example is particularly relevant, since like any good taxonomy, it progresses from the general to the more specific.

The image [below] represents a sliver of a categorization scheme (taxonomy) for a financial services organization. The financial services industry is one of the most standardized in the way it classifies information, and thus the example below could apply to many financial organizations, since most of them have the same types of products that are classified in similar ways.

A company that sells financial products might have market data, sales tools for financial advisors, and investor education on their website or to publish as print material. But most of the company's information is probably data about the products they sell. Typically, financial products (mutual funds in particular) are categorized by family, style, class, type, and sector, as illustrated. Each financial product can be classified into each of these categories, for example, a Fidelity Stock Growth Fund, Open-Ended Class A, invested in the Tech Sector. This allows both internal stakeholders and external consumers (business managers and customers) to find information in a consistent way, as well as develop a consistent mental model of how the products are classified. In time, consumers come to expect that products in certain categories will have certain characteristics.

## Business Case: Why Create a Taxonomy?



Simple taxonomy for a financial service company's product.

Ac-

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## Build It So They Can Find It

*"We used to spend hours locating charts and preparing for the next day's appointments. With FileTrail, we do the same work in minutes."*

Wes Watson, Central Records  
UCSF Neurology Clinic

*"I didn't know how much time I spent looking for files, and I can't believe how much easier my work day is now because of FileTrail."*

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Lovett Bookman Harmon Marks LLP

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Joshua Teeple, CPA, CFE  
Director of Litigation Technology Services  
Grobstein, Horwath & Company LLP

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ording to IDC Research, 15% to 30% of an employee's time is spent looking for information, and they find it only 50% of the time. Part of the promise of ECM is that it will solve some of that problem, but in reality, careful technology planning and content strategy is required before an organization can embark on a patch to success. Given the modern maze of enterprise content management imple-

mentations - which typically involve legacy data integration, CM software configurations or upgrades, and federated search - taxonomy is more vital than ever. The functionality of all applications within an ECM infrastructure is enhanced (and in some cases, dependent upon) a good taxonomy. Pair this with the increasingly sophisticated and specific content needs of your customers - both internal and external to the organization - and the taxonomy be-

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# Build It So They Can Find It

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comes the very foundation by which applications and users store, search for, and retrieve critical intellectual capital. Categorizing content into a taxonomy equals better access for all people and applications involved.

## A Working Example: Analog Devices

Analog Devices, Inc. is a leading manufacturer of semiconductors. Recently the firm implemented an enterprise CMS that leverages a rich product taxonomy to store metadata rich content, enable precise product searching, and dynamically display those results to both internal business users and external customers who are looking for highly specialized products. The home page illustration [ below ] shows how the taxonomy is fully exposed to end users. You can also see the taxonomy in action at [www.analog.com](http://www.analog.com)

On pages that are product-specific, products are presented in the context of the taxonomy via the navigation. All content associated with the product - such as a data sheet, specifications, or a block diagram - inherit the classification of the product. This enables very specific queries for a set of content to return precise results, such as Application Notes for all products in the Broadband Amplifiers category.

Categories in the taxonomy are leveraged to dynamically create category-specific product listings. All products on these pages appear based on their categorization in the

taxonomy, allowing product managers to maintain pages simply by categorizing their products, as opposed to having to edit the page in HTML. As products are added to the CMS and tagged in the taxonomy, the pages automatically update.

Overall, the taxonomy-driven CMS resulted in \$750,000 of content maintenance savings for Analog Devices in the first year.

## Key Considerations

There are numerous things to consider when embarking on an effort to build or enhance a taxonomy for our business. Questions to ask yourself before beginning include:

- What is the level of knowledge about taxonomy in the company as a whole?
- How much do I know about the subject matter? How much ramp up do I need?
- How many types of content will I need to consider?
- How many stakeholders and subject matter experts (SMEs) are there? Will they be available to help create the optimal taxonomy based on the subject matter? What types of politics or "issues" exist today between groups of owners/subject matter experts? Will they debate and/or argue over terminology or what should be classified where?
- Does any of the terminology need to be created from scratch or re-written?

The screenshot shows the Analog Devices website interface. The main content area is titled "CATV Amps/Splitters" and includes a "Description" section. Below the description is a "Customize Table" button and a table of product specifications.

Part#	Function	-3 dB BW (MHz)	Gain (dB)	Gain Low End (dB)	Gain High End (dB)	Gain Control Step (dB)	Distortion (2nd) (dBc)	Distortion (3rd) (dBc)	Voltage Supply (V)	Package
AD8320	CATV Line Driver	150	36	-10	+26	0.077	-82	-91	5 to 12	20-Lead PSOP
AD8321	CATV Line Driver	120	53	-27.4	+26	0.75	-51	-51	9	20-Lead SOIC
AD8322	CATV Line Driver	180	42	-12.6	+29.5	6	-52	-53	5	28-Lead TSSOP
AD8323	CATV Line	100	53.5	-26	+27.5	0.75	-71	-55	5	28-Lead TSSOP

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## ***Build It So They Can Find It***

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- Has any user feedback been received so far (internal or external, formal or informal), as to what they like and don't like about finding the company's information?
- Will we need to train internal users to tag content?
- Will our external customers be willing to help us validate the taxonomy before implementation?
- Do we have demographic information about our users available, so that we can target specific categories of content once the taxonomy is implemented?

At Molecular, we have found that the most successful taxonomy projects actively involve internal CMS users and

external customers of the organization. Researching, validating, and addressing their needs for content categorization, retrieval, and display will help drive adoption of both the internal CMS as well as the customer-facing application, be it as general as a full-scale website or as specific topic-specific cell phone newswire feed. We find that our clients value the voice of their customers, and see real business impact when they develop content strategies and taxonomies that reflect their customers' expectations over their own. After all - even though eggs don't come out of a cow, grocery store customers go to the dairy section to find them. The business constraint of refrigeration requires that eggs be with the other refriger-



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# Build It So They Can Find It

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ated products. The customer's mental model of where the eggs should be—is what enables them to find what they need efficiently, in a way that makes sense to them. Shouldn't your CMS do the same?

The U. S. government currently classifies documents at the rate of 125 a minute, using vague labels such as "sensitive security information," according to *The New York Times*.

Driven in part by fears of terrorism, government secrecy has reached a historic high. For example, a record 15.6 million documents were classified last year, nearly double the number in 2001, according to the federal Information Security Oversight Office. Meanwhile, the declassification process, which made millions of historical documents available annually in the 1990s, has slowed significantly - from 204 millions pages in 1997 to just 28 million pages last year.

*Theresa Regli, a principal consultant with technology consulting firm Molecular, Inc., applies over a decade of experience in content management and cross-media publishing working with firms that include Hewlett-Packard, Analog Devices and the Gillette Company. She can be reached at tregli@molecular.com or 617-281-6528.*

## Government Secrecy Reaches Historic Levels

The increasing secrecy is expensive to maintain. The office estimated that is cost taxpayers \$7.2 billion last year.

The acceleration of secrecy began after the 2001 attacks, according to the *Times*, as officials sought to restrict access to information that Al Qaeda might use to take advantage of the United States' vulnerabilities. Such worries have not faded, but more politicians and advocacy groups across the political spectrum say there is too much secrecy.

"You'd just be amazed at the kind of information that's classified - everyday information, things we all know from the newspaper." Thomas H. Kean, chairman of the 9/11 commission and a former Republican governor of New Jersey told the *Times*. "We're better off with openness. The best ally we have in protecting ourselves against terrorism is an informed public."

The *Times* cited examples of unnecessary classification, including: the Central Intelligence Agency's court fight this year to withhold its budgets from the 1950s and 1960s; the Defense Intelligence Agency's deletion of the fact that the Chilean dictator Augusto Pinochet was interested in "fencing, boxing, and horseback riding"; and the Justice Department's blacking out of a four-line quotation of a published Supreme Court decision.

"I've seen information that was classified that I've also seen published in third-grade textbooks," said J. William Leonard, who fought over classification during his three years as director of the Information Security Oversight Office.

Today, many more individuals can fore. Since 2001, President Bush has the heads of the Environmental Protection Agency, the Department of Health and Human Services, and the Department of Justice where officials are concerned about visit the agency's website and print out a

According to the *Times*, such labels have multiplied in recent years, going to "law enforcement sensitive," vague tags.

Some believe the new Public Interest Board (PIB) will help guard against excessive secrecy. The fund the PIB, an advisory group that never actually convened. The board will year.

Congress established the board to advise the president on ways to prevent agencies from classifying documents that should be public. According to the House report on the 2006 Defense Appropriations Committee will allocate \$1 million to the PIB.

Approval of the funding would mark an end to an embarrassing impasse in which the PIB has been unable to meet even though most of its members have now been named by the Bush White House and Congressional leaders.

As an advisory body, the board is not empowered to enact structural changes to the classification system, nor does it have any independent declassification authority. Still, supporters say it will provide an official venue to air concerns over classifications and declassification policies.

With reports of security breaches and data losses occurring on an almost weekly basis, companies are increasingly adopting data encryption technology that many previously avoided, according to Enterprise Strategy Group, a storage market research firm.



classify a document as secret than ever before. The president has extended the power to classify documents to the Department of Health and Agriculture. At the Agriculture Department, agroterrorism, the *Times* said employees can "sensitive security information" cover sheet. for unclassified information deemed sensitive beyond the traditional "for official use only" "homeland security sensitive," and other

est Declassification Board (PIDB) will help House recently approved a bill that would was established by law five years ago but receive its first allocation of funds next fiscal

(Continued on page 11)

# Government Secrecy Reaches Historic Levels

(Continued from page 10)

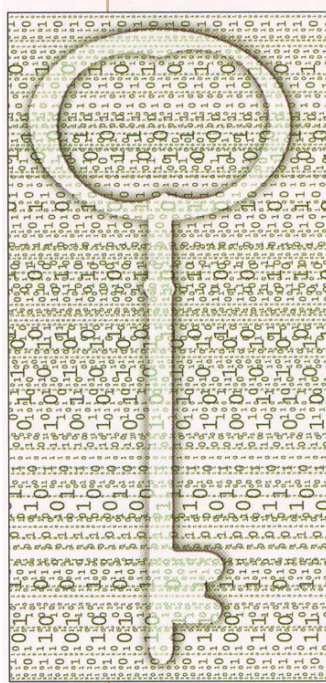
This article appeared in The Information Management Journal, September/October 2005, Vol. 39, No. 5.

## Breaches Spur Data Encryption

In the past, companies considered data encryption of backup tapes to be too costly and technologically challenging.

The report found that only 6 percent of other businesses encrypt backup tapes of computer data and a disaster.

There are no existing laws that require backup tapes, but Representative Ed Markey (D Mass.) has spoken in support of amending the Gramm-Leach-Bliley Act to require encryption. After experiencing large data breaches, Time Warner to adopt data encryption technology, and CitiFinancial have each pledged to eliminate backup tapes where possible and transfer to computer-to-computer data.



cent of financial service companies and 7 their backup tapes. Most companies create it with a third party in the event of

require companies to encrypt data on Markey (D Mass.) has spoken in support Act to require encryption. After exper- imer and CitiFinancial have each pledged and Bank of America has opted to elimi- transition to computer-to-computer data



This article appeared in The Information Management Journal, September/October 2005, Vol. 39, No. 5.

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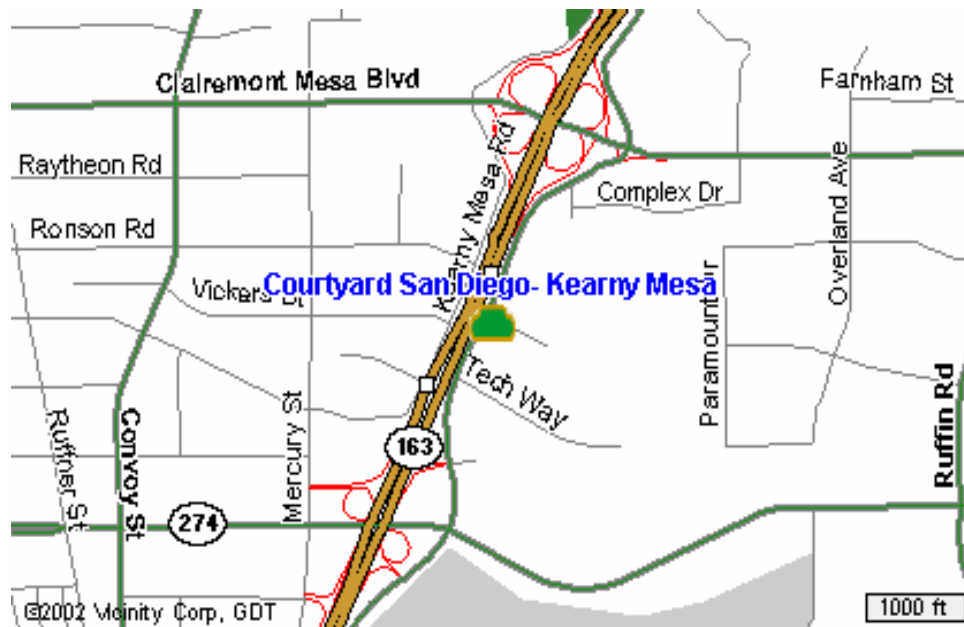


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# November Registration Form

Marriott Courtyard—Kearney Mesa  
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San Diego, CA 92123  
(858) 573-0700



**To Register:** FAX this form to [Linda Maczko](mailto:Linda Maczko) at (858) 534-6523, or Call Linda @ (858) 534-3395, or Email : [lmaczko@ucsd.edu](mailto:lmaczko@ucsd.edu) **NO LATER than 3:30 p.m., Monday, November 11, 2005. Cancellations later than 48 hours prior to the event will be billed to the person registered.** *If not sending advanced payment, cash or check payment required at registration.*

	Member	Non-Member
Lunch (please circle)	\$25.00	\$30.00

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX : \_\_\_\_\_ EMAIL : \_\_\_\_\_

# FYI

Here's the URL to a very important site—the **Chapter Connection** on the ARMA International Website!!

Go to <http://www.arma.org/intranet>

Click on **Chapter Connection**  
Check out this URL to find out about

## ARMA Webinars / Calendar of Events

<http://www.arma.org/resources/calendar.cfm>

## FREE TRAINING CLASSES!!

Centers for Education and Technology (CET), a part of the San Diego Community College District, is offering free training classes in a wide range of topics. Their Business Information Technology courses include offerings in HTML, XML, Java programming, JavaScript, UNIX, Cisco, Oracle, Linux, Visio, A+ Training, TCP/IP, MS Office and many others. These courses are offered at several campuses throughout the city.

Please take a look at their web site,  
<http://www.sandiegocet.net/index.php>, for class and registration information.

Check out vital information you might have missed!  
[http://www.arma.org/learning/seminar\\_archive.s.cfm](http://www.arma.org/learning/seminar_archive.s.cfm)

This is a link to ARMA Audio and Web Seminars that you might have missed.



**San Diego ARMA Board**  
**Meetings**  
November 2  
December 14  
February 1  
February 22  
April 12  
May 24

## ARMA Information

- [Compliance/Risk Management](#)
- [Electronic Records](#)
- [Legal/Regulatory Issues](#)
- [Privacy](#)
- [Records/Info Management](#)
- [Standards/Best Practices](#)



New Online Courses: Issues and Approaches in Archiving Electronic Records. ARMA's new online course will introduce you to the unique issues inherent to archiving electronic records. Learn about the strengths and weaknesses of various approaches to electronic records archiving, as well as recommendations for electronic archival processes and systems. Now available in the [ARMA Learning Center](#).

## Useful Links



## ARMA International Links

[What is RIM?](#)

[ARMA Membership](#)

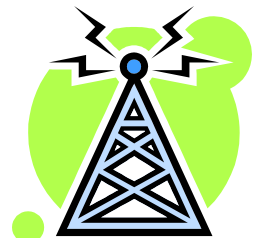
[ARMA Directories](#)

[ARMA Chapters and Regions](#)

[ARMA International Press Room](#)

[Educational Foundation](#)

[Calendar of Upcoming Events](#)





# MEMBERSHIP



## Membership Corner

By Linda Maczko

Welcome From the Membership Corner –

Members who joined in June:

Joetta Foster	Sempra Global
William Jenkins	Otay Water District
Rose Boelter	Sempra Global
Sysan Bryant	TAB Products
Jocelyn B. Montelland-Daluraya	Amylin Pharmaceuticals Inc. - Medical Writing



Members who joined in September:

La Tasha	Quintiles, Inc.
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**Every member counts and every member makes a contribution.** If I missed anybody, please let me know so that I can make sure you are included.

If you have questions about membership, please send your comments, questions, suggestions to myself at [lmaczko@ucsd.edu](mailto:lmaczko@ucsd.edu) or Tracee Hughs at [thughs@rdblaw.com](mailto:thughs@rdblaw.com).

Our hopes and **best wishes** go out to everyone affected by Hurricanes Rita and Wilma this season. We recognize that our members have been touched by this tragedy as well as our colleagues in the affected areas.

ARMA - San Diego Chapter  
Linda Maczko  
Membership Co-Chair  
Phone: 858-534-3395  
Email: [lmaczko@ucsd.edu](mailto:lmaczko@ucsd.edu)

Tracee Hughs  
Membership Co-Chair/ISG  
Phone: 619-557-4351  
Email: [thughs@rdblaw.com](mailto:thughs@rdblaw.com)



# Sites Every RIM Professional Should Know

(Continued from page 2)

rent RIM news items on a wide variety of issues. A set of links, often posted daily, give a short description of what the news stories are about, and this allows users to choose which stories they want to pursue in more detail. By itself, this feature makes subscribing to the records management listserv worthwhile.

This archive is great for allowing novices to explore the expertise of seasoned RIM veterans, but there are three caveats: 1) Many messages in the database are marginally RIM-related, so a bit of patience is needed when navigating the data; 2) opinions of posters are just that: personal experience and observations; and 3) links to RAIN articles are usually offered at the time of the posting but may require a subscription to the originating site after the initial posting.



## Legal and Regulatory Issues

**Legal Information Institute**, [www.law.cornell.edu](http://www.law.cornell.edu)

The Legal Information Institute of the law school at Cornell University is recognized as a valuable resource for legal research and is useful to RIM managers as they increasingly have to research laws and regulations that affect their policies, procedures, and retention practices. It is a jumping-off point for finding state, federal, and international law, and it is an access point for commercial laws, intellectual property, and federal and state rules of evidence. Quick access is supplied, for example, to the Federal Rules of Civil Procedure. State codes are searchable by subject. Those features make this a one-stop research point for users whose organizations do business in multiple states and who therefore must research the statutes and regulations of each of those states.

**The Code of Federal Regulations (CFR)**, [www.gpoaccess.gov/cfr/index.html](http://www.gpoaccess.gov/cfr/index.html)

One of the most-used resources for records retention schedule references is the U. S. Code of Federal Regulations (CFR). The CFR constitutes the regulations for the United States' federal agencies that are published on an annual basis. It contains the regulatory rules for retention for a variety of industry records. The Electronic Code of Federal Regulations (e-CFR) at [www.gpoaccess.gov/ecfr/](http://www.gpoaccess.gov/ecfr/) is a project that, while not the authorized version of the code, is a prototype for the near future. Also available at this site is the Federal Register, which is a daily publication of proposed regulations, including those with changes in records management issues.

RIM professionals in the United States need information on two major developments in the legal domain: The Health Insurance Portability and Accountability Act (HIPAA) and The Sarbanes-Oxley Act of 2002. Information about HIPAA and other national standards to protect the privacy of health information can be found at the U. S. Health and Human Services' Office of Civil Rights site at [www.hhs.gov/oce/hipaa](http://www.hhs.gov/oce/hipaa). Information about Sarbanes-Oxley, which is legislation creating greater oversight of financial disclosure, can be found at the U. S. Securities and Exchange Commission site at [www.sec.gov/spotlight/sarbanes-oxley.htm](http://www.sec.gov/spotlight/sarbanes-oxley.htm).

## National Archives and Records Management

**The National Archives and Records Administration (NARA)**,

[www.archives.gov/records\\_management](http://www.archives.gov/records_management)

Historically, NARA has been a leader from whose practices and training many RIM managers have benefited since the 1950s. NARA is a source for those interested in records management publications, policies, procedures, standards, and best practices - important resources not just for those in U. S. federal agencies but also in the broader profession. Specific areas of interest to non-government users include records management basics, white papers, for-fee and free publications, records policies, retention schedules, and a records management self-evaluation guideline.



**National Archives of the Commonwealth**, [www.nationalarchives.gov.uk](http://www.nationalarchives.gov.uk)

The National Archives of the United Kingdom has a useful site. Under "Services for Professionals," for example, there are useful white papers on records management, preservation and initiatives, and implementation of ISO 15489, which is the international records management standard.

**National Archives of Australia**, [www.naa.gov.au](http://www.naa.gov.au)

(Continued on page 17)

# Sites Every RIM Professional Should Know

(Continued from page 16)

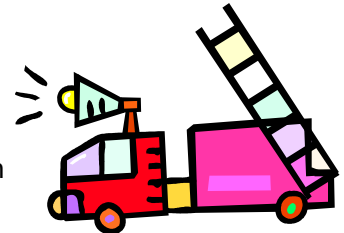
There is much here on RIM issues, including a large number of publications. Practices in preservation, digital records management, and storage standards are discussed at this site.

Also included is information about DIRKS (Designing and Implementing Recordkeeping Systems), which provides practical guidance on managing business information and records and complies with the methodology recommended in the Australian standard upon which ISO 15489 was based.

## Protection and Preservation

**National Fire Protection Association (NFPA)**, [www.nfpa.org](http://www.nfpa.org)

NFPA makes available widely respected standards for the storage and maintenance of records in records centers and media vaults that can be purchased and downloaded in PDF format. Additionally, hundreds of publications about records-related aspects of fire management are available at the NFPA site. These resources are critical to planning for and managing vital records and archival collections.



**Council on Library Information Resources**, [www.clir.org](http://www.clir.org)

The Council on Library and Information Resources (CLIR) is a non-profit organization that makes grants, holds workshops (with speakers' presentations available), and sponsors research and publications of interest to records managers and archivists. These include publications on the management of digital assets and digital preservation and, specifically, a research-based publication entitled *Care and Handling of CDs and DVDs: A Guide for Librarians and Archivists*.

**Conservation OnLine**, <http://palimpsest.stanford.edu/>

Conservation OnLine (CoOL) is a project of Stanford University and is something like Zaben's site but with a focus on preservation, disaster prevention, and recovery. Under preservation and conversation are topics and links for areas such as digital imaging, mold and pest management, audio materials, and deacidification. Much of this material is research-based. This site also offers disaster plan links, case histories, and hundreds of resources for important issues.

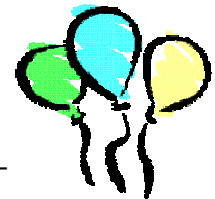
**Northeast Document Conservation Center**, [www.nedcc.org](http://www.nedcc.org)

The Northeast Document Conservation Center (NEDCC) is a large, nonprofit conservation center in the United States whose mission is, in part, "to improve the preservation programs of libraries, archives, museums, and other historical and cultural organizations." NEDCC offers services in paper preservation, microfilming, and photograph conversion. One of its best-known services is "The School for Scanning" conference offered at cities across the United States, which brings together a group of well-known faculty to discuss the preservation of digital objects. NEDCC also published the *Handbook for Digital Projects*.

## For Fun

**The Dead Media Project**, [www.dead-media.org](http://www.dead-media.org)

Many records managers with a sense of history - and a sense of humor - are fascinated with older forms of media and technology, some of which, such as sending messages via pneumatic tubes, persist. Go here to see a Scopitone or a Dubroni. This site includes communications, technologies such as radio, television, telephony, and typewriters and is also the place to explore interesting but failed forms of information storage and communication technology (e.g., carrier pigeons). "Information Technology in Ancient Athens" is particularly interesting. Those who discount the past might consider that some future information manager using an emergent information technology like ion beam etching, will ask, "So tell me, What was that magnetic media like?"



RIM professional should look for additional sites of value to them, but those offered here are likely to be worth book marking. Gold, after all, is where you find it.

**Raymond K. Cunningham Jr., CRM, CA**, is Records and Information Manager for the University of Illinois Foundation, Urbana, IL. He may be contacted at [Cunningham@uif.uillinois.edu](mailto:Cunningham@uif.uillinois.edu).

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