



Above: Ellen Zimmerman presented to ARMANNJ on the life cycle of electronic media. (Photo credits Seth Beim/Chris Reilly)

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Digital Records & Media Stability

Presented by Ellen Zimmerman, CMC CRM

Vice President, Naremcu Services, Inc.

Ms. Zimmerman's presentation is timely as many organizations are going digital. The focus of the presentation was on suitable and unsuitable magnetic media. Here is a brief summary of the presentation that was delivered to the general membership on January 20, 2010.

From a technology perspective the presentation navigated the audience from the technology involved and the steps needed to be taken to preserve and protect the magnetic media so that records (information) could be successfully retrieved when needed.

The types and family of tapes from Ferric Oxide used from the 1940's to the 1980's and Chromium Dioxide used from about the mid-1980's and "Evaporated

Metal" production were discussed with respect to their remanence (ability to retain information) after recording.

The preservation of such media rests with storing the magnetic tape in a controlled environment specific to a select range of humidity and temperature. The operating environment should be in a range of 60-degrees Fahrenheit (F) to 90-degrees F; and, a relative humidity (RH) range of 20% to 80%.

The storage conditions should be in a temperature range between 40-degrees F to 68-degrees F and a RH range from 20% to 45%. Life expectancy was simply defined to mean the time when an unacceptable error rate in using the media has been attained. Maintenance and samplings should be conducted on a regular basis.

All this and the basic tenants of Records and Information Management must be practiced to ensure that the information will be able to be retrieved when we need it.

("Meeting Recap" continued on page 3)

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President's Corner

By Kathleen Timothy



Welcome to ARMA NNJ 2010!

We continue our journey of education, networking, and collaboration in this our 50th year of incorporation. Please plan on our chapter anniversary celebrations in June.

The board of ARMA NNJ meets monthly and continues to work diligently to deliver programming that meets your developmental needs. Upcoming on February 17th, ARMA International's treasurer will discuss the **Generally Accepted Recordkeeping Principles (GARP)**. I invite you to familiarize yourself with the principles available for download at <http://www.arma.org/garp/index.cfm> and come prepared with your questions / concerns / and insights to share at the meeting.

We continue to be challenged with constricted financial resources and would like to invite our vendor members to share their ideas for more visible support of the chapter in delivering on its mission. To our general membership that may be challenged with maintaining their membership in ARMA and the chapter we'd like to remind you of the Two Pay Plan to ease this burden. You can reach out to the VP Membership, Angela Dzikowski for further details.

Application for our scholarship program closes on February 15th. Visit the website for details.

The board is looking to sponsor/ participate in a charity event in our area. If any of our members have a burning passion or interest in a particular organization where we can lend our support, please let us know.

Many of us are releasing a heavy sigh of relief to the end of 2009 and all the trials, anxiety and stress that the year represented. We optimistically look forward to a great 2010 and to seeing you at our chapter events and encourage your active participation in chapter activities.

("Meeting Recap" continued)

Some photos of attendees at January 20 ARMANNJ chapter meeting:



Above: ARMANNJ V.P. of programs, Ilana Lutman and fellow chapter members before the presentation.



Above: Larry Osusky (left) listens to ARMANNJ Secretary/Chapter Historian Anthony Abbate.



Above: V.P. of Membership, Angela Dzikowski and Secretary/Chapter Historian Anthony Abbate.



2010 Election Results: New Board Members Announced

John Frost, CRM, Chair of ARMA International's Election Management Task Force, has announced the following results of the 2010 general election for president-elect, treasurer, and association director (four positions):

President-Elect (2010-11): **Galina Datskovsky**

Treasurer (2010-12): **Fred Pulzello**

Association Directors (2010-13):

Brian Moriki
William LeFevre
Julie Colgan
Paula Sutton

Congratulations to ARMA International's new board members for their commitment to the profession and the association. Their terms will begin July 1.



Secretary's Corner

by Tony Abbate

Chapter Secretary/Historian



The ARMANNJ Board is actively pursuing avenues to generate revenue and to control costs of the ARMANNJ Chapter. Current work underway includes:

The ARMANNJ Board of Directors directed Sam Mowaswes, VP-Marketing and Ed Jassin, Director, to develop an action plan by January 29, 2010 to address what action the Board needs to take in order to promote a higher level of vendor participation to support the generation of revenue for our Chapter.

Achieving one of the ARMANNJ's goals and objectives for 2010:

The ARMANNJ Board of Directors and the Chapter's full membership was able to successfully support the efforts of a Queens College Graduate student, Narita Maraj, in developing and delivering a paper on "Standards in Electronic Records Management: A survey of Records Managers to determine the relevance of, and the guidance provided by ISO 15489:2001 & DoD 5015.02-STD." The paper was successful and was awarded a grade of "A". Narita fully recognized the efforts of the Chapter throughout her paper and expressed a sincere thank you to all who assisted her. This work supports the Chapter's goal and objective to support the



ICRM Notes

Institute of Certified Records Managers

“Knowledge, Experience, Integrity”



By Scott Bowker, CRM

The latest edition of *ProfessionNotes* (the newsletter of the Institute of Certified Records Managers) has some items of interest that I wanted to share. You can obtain the full version of the newsletter at www.icrm.org.

ICRM Logo

Take a good look at the logo at the top of this column since this should be the last time you will see it. At the annual business meeting at the ARMA Conference in Orlando, a newly created logo for the ICRM was revealed. The filing with the US Patents and Trademark Office is being updated to register the new logo and then it can be formally used. However, if you want a preview just go to the current newsletter on the ICRM website (<http://www.icrm.org/newsletter/2009Fall.pdf>).

ICRM Marketing and Branding Survey Results

This survey included general questions to CRMs and CRM candidates regarding the certification and other aspects of the ICRM. Highlights include:

- Certification Awareness: ARMA International is responsible for the clear majority of CRM awareness. A better job needs to be done in pre-qualifying prospects and building more awareness of the ICRM.
- Communications Strategy: The website can be perceived as confusing since it is used by both CRMs and CRM candidates. The segregation of the website (and the newsletter) between the target audiences is being considered.

Demographics: The population of CRMs is aging and efforts need to be made in cultivating younger professionals and addressing changing member needs.

The survey was answered by 411 CRMs (myself included!!) and 175 CRM candidates. Some interesting facts from the survey:

- 28% of CRMs have held the credential at least 10 years but not more than 20
 - 27% of CRMs have held the credential at least 1 year but not more than 5
 - 72% of CRMs and 73% of candidates learned about the CRM credential through ARMA colleagues
 - CRM candidates most want to attend Examination Preparation Workshops at local ARMA chapters (52%), other association or ARMA chapters (40%), webinars (51%) and ARMA Conference general sessions (15%)
 - 67% of CRMs and 58% of candidates do not feel that the original (current) ICRM logo accurately reflects the RIM profession
 - 79% of CRMs and candidates indicate they have never seen or heard an advertisement about the CRM certification
 - 55% of CRMs and candidates state their employer pays or will pay their ICRM annual dues
 - 45% of CRMs and candidates indicate they would recommend the CRM certification to a colleague
 - 37% of CRMs and candidates hold a Master's Degree
 - 45% of CRMS and candidates have 21 or more years of experience in RIM
 - 64.4% of CRMs and candidates are women
 - 44% of CRMs and candidates are between 46 and 55, 26% are between 56 and 65, and 23% are 36 to 45
- 12% of CRMs and candidates are consultants and 25% work in government

If you are interested in sitting for the exam or have questions about the ICRM, please contact me. Email (scott.bowker@sanofi-aventis.com) is the best way since I'm often not at my desk!



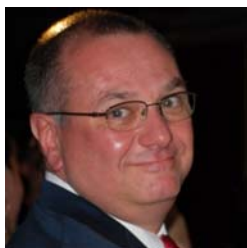
The Value of Applying the Generally Accepted Recordkeeping Principles ^(sm) to Your Organization

Wednesday, February 17, 2010 ARMA NNJ Chapter Meeting

This session provides an overview of the Generally Accepted Recordkeeping Principles SM, (GARP SM) and explores practical implications for an organization's information management program. It is only through the information an organization records that it can know what it has done and effectively plan what it will do in the future. In the world of business today, it is critical for businesses to achieve this level of transparency and accountability through compliant recordkeeping. Understand the value of using Generally Accepted Recordkeeping Principles SM to measure your organization's progress toward a compliant enterprise-wide program

Presented by:

Fred A. Pulzello, MBA, CRM, has 20 years of experience in records and information management (RIM). Fred is currently an executive RIM and technology consultant and was previously executive director and global corporate information manager for Morgan Stanley Inc. and before that was assistant vice president of the corporate records management group for Merrill Lynch & Co. Fred is Chair of the task force developing GARPSM and the current Treasurer of ARMA International. He earned a master's degree in business administration from Seton Hall University and a bachelor's degree in computer information systems from Manhattan College. He may be contacted at FPulzello@aol.com



Welcome, New Members!

Ms. Elizabeth Anne Arnold
Manager, Knowledge Services
Celgene Corporation
Summit, NJ 07901
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Liz Arnold, Manager, Knowledge Services, at Celgene Corporation in Summit, NJ. Liz has held positions in information and content management at Merck & Co., Inc. and i3, a division of UnitedHealth Group. In her current role she is managing global contracts, looking at new technologies to manage information, and managing a team of library professionals. She recently assumed responsibility for managing her department's records management function. Liz has been active in Special Libraries Association, and she is looking forward to networking with colleagues in Records Management functions.

Mrs. Crystal Lynne Simmons
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A Beginners Take on Studying for the CRM Exams

Seth T. Beim, ARMA NNJ Treasurer

I first looked into preparing for the CRM (Certified Records Manager) exams last year. I visited the ICRM website, spent considerable time gathering relevant education and work experience materials and submitted everything for an acceptance review. I breathed a huge sigh of relief when I received a letter in the mail letting me know I was approved to sit for the tests. I began looking into what I would be studying and where I would need to find information that would be on the exams. I quickly became overwhelmed when I saw the broad range of RIM subjects the test covered and even more surprised when I learned the information was found in a suggested listing of books which is 17 pages long including hundreds of books and periodicals.

I used LinkedIn.com and the suggested contacts provided by colleagues and chapter members to find CRM's far and wide. I sent numerous emails asking CRM's across the country for their advice and recommendations. I was looking for details on where to start, which books to use, the best methods to study and numerous other answers to get myself pointed in the right direction. Luckily, it seems like most CRM's are happy to share their experiences and gave me some great pointers. My manager suggested I reach out to the ARMA NNJ chapter librarian and CRM, Scott Bowker. I met with him several times and he has turned out to be a tremendous help. Scott was kind enough to answer my many questions, offered his expert advice and geared me towards some recommended books available from our chapter's wide-ranging library. He provided me with a huge pile of books. I also used books from my local library (which is very limited), ARMA's Information Management Journal and multiple sources on the web.

Now came what I still consider the most difficult part;

getting myself to make time to sit down and study. I spent hours sitting at my dining room table several nights a week surrounded by books, notes and lots of coffee. For me, studying at college turned out to be a lot different than studying after a long day at a full time job. I found out which study methods currently work for me and what didn't. I wasn't retaining info by just reading books so I kept binders set up for each part of the first section and filled in detailed notes found in all of the sources. Some of the books I studied from were old and not even in print anymore but they turned out to be outstanding resources. One of the best resources is available for free from the ICRM website, the study guide. It explains everything that will be on the test, has helpful hints and sample questions. At one point I attended an outstanding CRM study workshop put together by the ARMA NYC chapter. Ultimately, I put in lots and lots of time reading and reviewing when often what I really wanted to be doing was watching TV or going out.

I successfully completed 2 of the 5 multiple-choice exam sections so far and I'm continuing to study for the next section. The exams were actually much more difficult than what I was expecting. Some people suggest taking all of the exams up front without studying first. The idea is to identify your weak points and get a better understanding of what to focus on studying. I decided I'd rather use my own methods and I'm slowly making my way through. I am thankful our chapter has such a wide variety of books available (for free) in our library. I have also greatly appreciated the help and support from my manager and colleagues, CRM's, chapter members and especially the time Scott Bowker provides from his very busy work schedule. If there are any other CRM's reading this, please drop me a line and share your advice. If anyone else is interested in studying, let me know and I'd be glad to help. Wish me luck on the remaining sections!





**NYC METRO, NNJ & CNJ ARMA
MARCH 18, 2010 (THURSDAY)
ALL-DAY EDUCATIONAL EVENT
NEW YORK CITY LIFE – HOST JASON C. STEARNS**

Venue:
New York Life Insurance Company
51 Madison Avenue - Room 1116
New York, NY 10010

PRICING FOR TRACK 1 and 2

\$125 Early-bird registration until Jan. 15, 2009 (for members only MUST be paid in FULL by Jan 15)
 \$145 Early-bird registration until Jan. 15, 2009 (for non-members MUST be paid in FULL by Jan 15)
 \$145 Member (after Jan 15)
 \$170 Non-Members (after Jan 15)
 \$190 Walk-ins on the Day of the Event

Sessions for track 1 and 2 -

Head in the Clouds	Judge Ron Hedges and Judge James C. Francis
Wikis and Blogs	Jason C. Stearns, CRM
Data Mapping for Successful Conversions Part 1 and 2	Melissa Dederer, CRM
Getting Your Organization Going with GARP	Galina Datskovsky, Lenore Greenberg, Fred Puzello Moderator TBA
eDiscovery - Search Success, Financial Impact, RIM Role, and Wishlist for the Future	Maura Grossman, Esq.
Writing for Publication	Susan Goodman CRM
Taxonomy Topic TBA	Seth Earley

End of day wrap-up by John Mancini. New for this year – Choice of Track 3 –

Effective E-mail Management - Jesse Wilkins

\$225 Early-bird registration until Jan. 15, 2009 (for members only. MUST be paid in FULL by Jan 15)
 \$245 Early-bird registration until Jan. 15, 2009 (for non-members MUST be paid in FULL by Jan 15)
 \$245 Member (after Jan 15)
 \$270 Non-Members (after Jan 15)
 \$290 Walk-ins on the Day of the Event
 Lunch Exhibits with Vendors.....Vendor Sponsoship
 Platinum Sponsorship \$1450 Early-bird (Until Dec.15, 2009) \$1305
 Standard Sponsorship \$595 Early-bird (Until Dec. 15, 2009) \$535 If interested please contact Ilana Lutman,
 events@armannj.org.

Information Lifecycle Management

A Novel Approach in Information

Management or Records Management Reinvented?

Karl P. Zoeckler, CRM

Information Lifecycle Management

Morgan Stanley, New York, NY

The concept of Information Lifecycle Management (ILM) has been growing in popularity in recent history in corporate programs, government, and by vendors. But what is ILM and how is it different from Records Management? The concept of lifecycle as applied to records and information management is certainly not a new idea. Although the lifecycle has been a central concept of Records Managers, Archivists, particularly outside of North America, have put credence on the records continuum model that looks at records from a space/time perspective. The lifecycle concept borrows from biology, where the phases of birth, infancy, juvenility, and adulthood eventually lead to reproduction and the creation of new life. Information does not really follow a life cycle, since the maturity of records does not lead to the creation of new records. Rather, it follows a linear path (lifespan) of phases and processes, starting with creation, active use, inactive storage and disposition (transfer, destruction or permanent status). At any time until destruction occurs, a record may be retrieved, so I don't see that as a phase as depicted by some lifecycle diagrams. Records are characterized and treated differently in each phase. Records can also be repurposed, killed in the draft stage, or pulled from inactive storage to become active again, thus requiring backflows and outflows from the cycle. So the lifespan is not just a one way street. Wikipedia defines Information Lifecycle Management as, "a comprehensive approach to managing the flow of an information system's data and associated metadata from creation and initial storage to the time when it becomes obsolete and is deleted."

The Storage Network Industry Association (SNIA) defined ILM in somewhat broader terms as, "Information Lifecycle Management comprises the policies, processes, practices, and tools used to align the business value of information with the most appropriate and cost effective IT infrastructure from the

time information is conceived through its final disposition." While the references to the birth to death coverage are consistent, the SNIA definition introduces an emphasis on policy, tools and cost effectiveness. The emphasis on cost effectiveness is very timely and appealing in the current economy. Wikipedia defines Records Management as, "the practice of maintaining the records of an organization from the time they are created up to their eventual disposal. This may include classifying, storing, securing, and destruction (or in some cases, archival preservation) of records." Again we find a preponderance of the lifecycle concept so how does ILM distinguish itself from Records Management? Before we go any further, you should know that I may have a certain prejudice here, having spent the overwhelming majority of my career working as a records manager and only the last two and a half years working in ILM. I can not help but perceive that ILM is just a sexier repackaging of Records Management. And tell me if this sounds familiar, "ILM is all about six rights: having the right information (data) in the right place at the right time, for the right duration, with the right level of protection, and the right level of accessibility."2 The ILM tag line adds duration, protection and accessibility to this age old records management adage. An ILM program is a tempting remedy for an underperforming RM program, one that just couldn't get out from under the pile of physical records, or one that couldn't get budget or get the attention it needed from upper management. The new strategy promises to aggressively dispose of records and to be more tech savvy. ILM embedded in IT tends to approach records management from the system side, determining what systems are producing the records and building plans to provide disposition capability from the point of creation. Potential timebombs like the long term retention of back-up tapes are more likely to be addressed by a tech-oriented function. Other actions controlled by IT such as decommissioning of user drives of departed employees, and deletion of inactive electronic repositories may come under ILM control. ILM is very focused on storage and in its earliest manifestations seemed to be only concerned with the end-of-life phase of records. Statements such as, "ILM represents a major shift in the approach towards creating and managing a storage infrastructure and the data it maintains"3, underscore this view of ILM.

Vendors have readily adopted the ILM moniker. They are, of course, always looking for a more marketable approach to information management. We've especially seen this around records/document/content

management systems over the years. SUN Microsystems, IBM, EMC2, and Revivio have been working together since 2004 and collaborating with ARMA, to establish standards and terminology for ILM. Oracle, OpenText, Computer Associates and Iron Mountain have also been active in marketing ILM. Storage vendors are promoting ILM as a set of analysis, technologies, and methods that optimize and potentially automate the flow of data through the lifecycle. This includes rules to migrate data to lower cost storage, or compliant storage, e.g., WORM, at the appropriate time; de-duplicate and ultimately purge data⁴. The dependency on backup tapes for storage can be mitigated, so that backups are for recovery only.

Compliance is a major driver for applying ILM (as well as for RM) and vendors are pushing ILM as a part of solutions suites and consulting, especially for SOX and HIPPA. Since ILM is the more IT oriented version of Records Management, it is reasonable to ask if the IT organization can be trusted to get it right. A Cohassett Associates survey in 2002 asked, “Do you believe that IT in your organization really understands the concept of life-cycle regarding the management of electronic records?” It was surprising that 73% said they did *not* believe IT understood the life-cycle concept. Given that, ILM programs really need to include Records Management professions to bring the knowledge of lifecycle management and credibility to the program. It could be argued that most Records Management as well as ILM programs don’t fully leverage the lifecycle concept in that they are primarily focused on end of lifecycle and disposition. Increasing maturity levels of these programs trend towards managing records earlier in the cycle, in the active and creation phases as well. There are many ways that RM and ILM can apply management practices to the creation phase, including forms design, style manuals, and authoring policies. Because so much data, information and records are generated from applications, it makes sense to apply records management principles at the application level. Recently reported statistics from HP indicate that as much as 61% of all new electronic records are being generated from applications, 28% email and 11% from files (Word, Excel, desktop/office software). ILM programs are targeting applications as the starting point for control of records. The assessment of applications can determine what type of information is being generated and appropriate RM functions can then be applied. Information can be tagged for records classification and information security at the beginning of its lifecycle to ensure proper compliance and

retention throughout its lifecycle. A fundamental concept that has separated Records Management from Information Management has been the very definition of records as specific objects of proprietary preservation-worthy information. ILM may be more open to a broader application of concepts that include the management of data and information as well as records. Unfortunately, if an ILM program is using a *records* retention schedule, there are inherent difficulties with data classification. As data are the building blocks of records, data can be combined in different ways under different contexts, and become different records. Information Lifecycle Management may not be a Records Management program on steroids, but it does bring some novel approaches to the business practices Records Managers know and love. It is the fundamentals of Records Management: compliance, policies & procedures, classification, indexing, storage & retrieval, preservation, and disposition that form the basis for ILM. Without these, ILM would be technology without policy.

1. Upward, Frank, Structuring the Records Continuum – Part One: Postcustodial Principles and Properties, Archives and Manuscripts, vol. 24, no. 2, 1996, pp. 268-285
2. Fitzgerald, Jim, Information Lifecycle Management: It’s Logical, Maybe, JJWild
3. Harwood, Mike, Storage Basics: Information Lifecycle Management, internet.com
4. Duplessie, Steve, et al, The New Buzzwords: Information Lifecycle Management, ComputerWorld, March 31, 2003

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Contacting the ARMANNJ Board of Directors

We recognize that our Chapter Membership and Non-Members may have wonderful ideas for an Event, a Chapter Meeting or may desire to reach out to the board on other matters. We encourage your communication.

Each Board Member can be contact directly on any matters relating to their function. All other matters, please, direct all communications to the Chapter's Secretary – Tony Abbate: recordkeeper@armannj.org.

To contact us, [click here](#), to visit our Leadership Page.

Site Visits by Members and Non-Members for December 2008 – December 2009

