



April 2011
Volume 42, Issue No. 8

2008-9 and 2009-10 ARMA International
Newsletter of the Year Award Recipient



For the Record
Newsletter of the Oregon Chapter

ARMA INTERNATIONAL—The Information Management Professionals

***“ONE SIZE DOES NOT FIT ALL -
SMALL AND MID SIZE LAW FIRM
RECORDS MANAGEMENT”
SUE LORD AND ANDREW SANAGUSTIN***

Date: Tuesday, April 12, 2011
Time: 12:00 to 2:00 p.m.
Location: Ernesto’s Italian Restaurant
8544 SW Apple Way
Portland, OR
(See Map on Page 3)

Cost: \$20 per ARMA member with meal
\$15 for Members without meal
\$25 for Non-Members with meal
\$20 for Non-Members without meal

Meal Choices: Meat or Veggie Lasagna
Chicken Picata
Fettuccini Primavera
Cannelloni
(Includes beverage and small dessert bars)

Program Description: A successful Records Asset Management plan is a plan that works best in your culture and in your organization. The road to non-compliance is littered with good intentions and failed RIM plans that were theoretically sound, but weren't designed for the environment it was intended (we refer to this as the "square peg in a round hole" syndrome). It's not the size of the corporation but how solid the strategy is - and how you are able to properly incorporate the GARP principles into your practice. In this presentation, we'll demonstrate the different RIM methodolo-

Continued on next page

Oregon ARMA
P. O. Box 40004
Portland, OR 97240-0004

www.oregonarma.org

Inside This Issue

Chapter Meeting Program— Law Firm Records Management— Sue Lord and Andrew SanAgustin • Map—Page 3	1
From the Square Office—Cheryl Dorman, Chapter President	4
Members Only—Kimberlee Akimoto, Membership Director	5
Check It Out—Kimberlee Wollenburg, Education Director	6
March Chapter Meeting Recap—Tyrene Bada, Webmaster	7
Advertising Rates	7
Digital Records Management—A Successful Seminar—Cheryl Dorman	9
Message from the Great Northwest Region—Marc Simpson, GNW Region Manager	11
Ask the CRM—Bob Dalton, CRM	13
Registration	18
Officer Page	19



APRIL IS RIM MONTH— CHECK OUT
EXCERPTS FROM
ARMA INTERNATIONAL WEBSITE
WHERE THIS SYMBOL APPEARS

gies implemented in two separate law firms. One is a larger operation than the other. Nevertheless, it's evident that the same accepted practices are exhibited in each. You'll notice the obvious differences, and find both may not necessarily be on the same road to the RIM utopia - but are certainly traveling in the same direction.

Attendees will walk away with a better understanding of how work styles vary from one sized law firm culture to another. They will gain insight on how flexibility is the key to success in any RIM plan, so long as the principles remain the focus and primary objective. We'll reach out to the audience and urge their feedback and participation to help share other successful (and not so successful) ideas and implementations. Finally, we'll identify the pitfalls of implementing the wrong plan in the wrong environment - and how best to avoid the "one size fits all" caveat.

Speaker Bios: Susan M. Lord is the Records and Information Manager for the law firm of Vandenberg Johnson & Gandara, LLP in Tacoma, WA. Her primary duties include supervising the firm library; managing the firm's business and client records, both active and closed; supervising the firm's computer network and acts as the "on-site" "help-desk" person for 38 computer users in the firm. She is the Conflicts Manager and Docketing Clerk for the firm. In addition, she serves as Chair of the Technology Committee for the firm. She has been with VJ&G for over 21 years.

Sue has been a member of the Puget Sound Chapter of ARMA, International for 14 years. She served the chapter as Treasurer (two terms), President (two terms – receiving Chapter of the Year

Continued on next page



LESS MORE
PAPER WORK

Contact us today so we can
help with your paperLESS needs!

14780 S.W. Osprey Dr. Ste 240
Beaverton, OR 97007
503-641-0800 ~ 800-444-8688

INTEGRA
PAPERLESS BUSINESS SOLUTIONS

www.IntegraECM.com

GO PAPERLESS. GO DIGITAL!

Awards during each year), and Chairman of the Board (two terms). She was co-editor of *Soundings*, the Puget Sound Chapter's award-winning newsletter, for four years.

Sue served ARMA International as the Great Northwest Region Manager from March, 2004 through June, 2008. She was elected to serve as Association Director on ARMA International's Board commencing in July, 2008. In addition, Sue is currently serving as Chair of the Association Infrastructure Committee for the Board. She is concluding her third and final year of service as Director.

Andrew SanAgustin is records and conflicts manager for Foster Pepper and has been a records and information management professional for 20 years. His career spans various industries with a specialty in law firm records and conflicts management. SanAgustin's area of expertise includes back-end system development and front-end user interaction, policy creation, standardization, change management, and electronic data management. He has implemented new records management systems, document management systems, and e-mail management systems into various industry cultures. SanAgustin has authored several articles and regularly speaks on the topic of records and conflicts management.

Copied from the ARMA website for LitCon 2010

DIRECTIONS TO ERNESTO'S ITALIAN RESTAURANT

8544 SW Apple Way
Portland, OR
(One block east of Jesuit High School)



RIM Self Assessment



Achieve your professional goals. Take the ARMA International RIM Competencies Self Assessment to find out where you are and where you need to be. (www.arma.org/competencies/index.cfm).

FROM THE SQUARE OFFICE

CHERYL DORMAN, PRESIDENT

Celebrate!



We all like to celebrate, whether it's a birthday, achievement of a goal, or even something like watching your child kick the winning goal in a game of soccer. Did you ever stop to celebrate something at work? No, I'm not talking about celebrating your co-workers retirement but about your profession.



April is National RIM (Records & Information Management) Month. Not many professions get to celebrate what they do and who they are for an entire month.



Many people we work with don't have a clue what Records Management is all about. One of the first things they tell you in Basic Records Management is to find yourself a Champion. Usually this Champion is someone high enough in the company to make company choices or influence those who do. If you don't yet have a person like that backing you up, then find that person and educate them using the ARMA RIM materials. ARMA has many publications – a lot of them free – that you can download and share with your companies to give them the basics. They also offer online courses and webinars at discounted prices to all ARMA members. Take advantage of RIM Month and use this time to educate them and show them how we can help make their lives much easier, whether they think so or not. You just never know where it might lead. I can only think of that old commercial for Breck shampoo, where they told two friends, and they told two friends, and they told two friends . . . well, you get the idea.

Now – go out and celebrate!

PROMOTE RIM WITHIN YOUR ORGANIZATION!



Managing records and information is an essential element to the competitiveness and accountability of an organization. Too often, RIM professionals are the unsung heroes of the organization. It's time to promote the value of RIM!

These materials have been developed to help you promote the value of proper records and information management practices within your organization. The following tools have been created to help promote the importance of RIM in any organization.

Want to show the world how great your RIM program is?

Apply today for the 2011 ARMA International Cobalt Award!!

More information about RIM promotion, go to <https://www.arma.org/rim/promotion/index.cfm#campaign>



MEMBERS ONLY

Your exclusive pass to RIM resources and membership benefits
Kimberlee Akimoto, Director of Membership

Hello Oregon ARMA members! Here is the membership update for April 2011:

Welcome Hussein Nagji, Eric A Pono, and Kristen Sanders, our newest members!

The following Oregon ARMA members are celebrating their anniversaries in April:

Melanie George	14 years
Jane McGarvin	13 years
Melinda Murray	9 years
Joseph Morris	7 years
David Hildebrandt	6 years
Sherrie Reid	6 years
Brenda Grigsby	1 year
Mark Warnock	1 year

Congratulations to all of you!

TAB isn't just folders and shelving.

Contact your TAB Representative to learn more about our Professional Services:

- Consulting in Records & Information Management
- Outsourcing
- File Conversions/Inventory
- Records Design & Storage Solutions
- File Product Solutions
- File Room Design & Storage Planning

ARMA Educational Opportunities

Online Courses are your gateway to convenient and flexible online training

Facilitator Resources is designed to assist our facilitators with the development of their educational programs

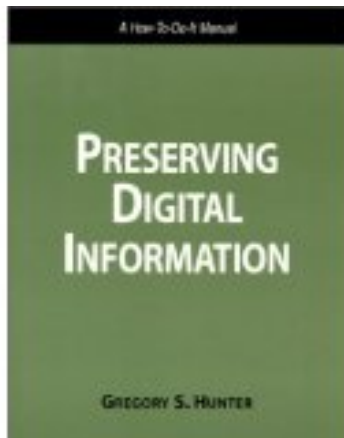
Web Seminars provide flexibility to attend professional training when it is most convenient.

RIM—Learn more about certification in the records & information management field.

TAB Products • Phone: 503.223.4437 • Toll Free: 800.333.9098
 www.tab.com

CHECK IT OUT

KIMBERLY WOLLENBURG
DIRECTOR OF EDUCATION



Preserving Digital Information – A How-To-Do-It Manual

Gregory S. Hunter

ISBN: 1-55570-353-4

Preserving electronic information presents a new challenge for librarians, archivists, and others. Both large and small organizations are now responsible not only for preserving print resources but for preserving digital information on disks, networks, CD-ROMs, and other electronic media as well.

This unique manual shows how to apply the "best practices" recommended by professional associations and experts for preserving information in electronic formats. You'll find specific guidance in all aspects of preserving digital information including recommended storage considerations, file format issues, preserving e-mail messages and Web pages, and technical aspects of digital imaging. The author, one of the nation's most respected preservation professionals, outlines a seven-step approach to implementing a system for preserving digital records. The nature of digital information, media fragility, technical obsolescence, system integrity, and "the digital record" are covered. Get practical expert advice for managing the process— and ensuring that today's digital libraries will be preserved and useable by future generations.

This manual is the winner of the Society of American Archivists' (SAA) 2001 Preservation Publications Award. It was described by its nominator as "a thorough and systematic review of the issues, best practices, and challenges associated with the preservation of digital objects."

Library materials are available for loan to ARMA Oregon members. Take advantage of this valuable resource at: <http://www.oregonarma.org/library.php>.

I'm still shopping! If there are any resources you'd like to see added to the library, please feel free to email me at kwollenburg@co.clackamas.or.us



Welcome to ARMA ICONFERENCE

This is the place for all ARMA International Conference & Expo participants to gather—before, during and after—and create a virtual community to discuss issues, trade insights, and network around topics of relevance to the information management profession. It just takes a minute or two to set up a profile. So join now and get in on all the action!

Once you have set up a profile, join the discussion. You can also chat, share links, post comments, add events, or upload photos and videos to share with your peers. As an information management professional, this is your online space, so make yourself at home....or work. Please submit all interest and industry group suggestions to the site administrator.

MARCH CHAPTER MEETING RECAP DIGITAL RECORDS MANAGEMENT

TYRENE BADA, CHAPTER WEBMISTRESS



*Al Smith
PERS*

The full-day event was kicked off with an entertaining presentation from Al Smith and Genifer Graff. Al has most recently presented the topic of Digital Records at the ARMA International conference in San Francisco last November. His great sense of humor kept the room laughing. He also shared some great tips about how to work with Subject Matter Experts to create the best records management solution that works for everyone. Genifer talked about the reasons why going digital may be beneficial in the event of a disaster. She explained why the huge cost of going digital may be high, but may actually reduce costs in the long run.



Genifer Graff

After a short break, Connor Edmonds from the Oregon State Archives, presented information about the State's new pilot program to offer HP TRIM as a Software as a Service (Saas) in partnership with local government. The HP TRIM software program has been around for over 30 years, and the State of Oregon has chosen it to have as the state-wide Electronic Records Management System (ERMS).



Connor Edmonds

The pilot program is only \$37.02 per month per user. As more organizations join, the price could become as low as \$10.54. Rebates will be issued once 20,000 users are signed up. Organizations who wish to join would need to sign an Intergovernmental Agreement (IGA) with the State. Connor will announce when there will be more

Continued on next page

Advertising Rates

Effective September 1, 2008, the advertising rates for 9 issues are as follows:

Full Page.....\$315 Half Page \$255

Quarter Page.....\$215 Third Page\$230

One Month Ad, Any Size \$55

All copy must be submitted in either .tif or .pdf format by the 10th of the month to Newsletter Director Jane McGarvin.

Phone: 503-635-0236

Fax: 503-697-6594

Email: jmgarvin@ci.oswego.or.us

informational meetings about this service.



*Autumn Tysko
HP Representative*

HP was generous enough to not only provide a tasty breakfast, but also a box lunch for everyone. During lunch, Autumn Tysko, a representative from HP spoke more about the TRIM program. After lunch, Amy Sowa, the City Recorder from the City of Springfield, presented her experience with going digital and how it affected her office.



*Amy Sowa
Springfield City Recorder*


Almost 70 people attended the meeting, and some traveled many hundreds of miles to get there. Everyone seemed very pleased with the presentations.



*President Cheryl Dorman
Mary Dibble, Albany Deputy
City Recorder*



GARP—The Generally Accepted Recordkeeping Principles ®

 Records and recordkeeping are inextricably linked with any organized activity. It is only through the information an organization records in the normal course of business that it can know what it has done and effectively plan what it will do in the future. A key resource in the operation of any organization, records must be created, organized, secured, maintained, and used in a way that effectively supports the activity of that organization, including:

- Facilitating and sustaining day-to-day operations
- Supporting predictive activities such as budgeting and planning
- Assisting in answering questions about past decisions and activities
- Demonstrating and documenting compliance with applicable laws, regulations, and standards

Principles of Accountability, Principle of Integrity, Principle of Protection, Principle of Availability, Principle of Retention, Principle of Disposition, Principle of Transparency

To download and read further, go to <http://www.arma.org/garp/index.cfm>

DIGITAL RECORDS MANAGEMENT A SUCCESSFUL SEMINAR CHERYL DORMAN, PRESIDENT

As we approached the March Digital Records Management all-day seminar, I couldn't help but be appreciative about it. Did we pull in the right speakers, will we have enough food, will the location be easy to find. Turns out, I didn't have to worry about a thing.

Our speakers for the day were fantastic! Board members chipped in to help introduce each new speaker, some pulling double duty by sitting at the registration table or helping with the food setup. The room was large enough to hold the 55-60 attendees without being too crowded. A lot of those attendees were from the Oregon Association of Municipal Recordors (OAMR) and some were from AIIM, although many of them actually hold "dual citizenship" with OAMR, AIIM, and/or ARMA.

Thank you to all those who made it a success:

Al Smith, Oregon PERS
Genifer Graff, IBM
Connor Edmunds, Oregon State Archives
Mary Beth Herkert, Oregon State Archives
Autumn Tysko, HP, Event Sponsor
Amy Sowa, City Recorder, City of Springfield
Tim Hunt, Immediate Past President
Dwight Wallis, Treasurer
Jane McGarvin, Newsletter Director
Tyrene Bada, Webmaster
Kim Akimoto, Membership Director
Kim Wollenburg, Education Director
Mary Dibble, Deputy City Recorder, City of Albany

THANKS,
FRIENDS!

And thank you to all the attendees, as it would not have been successful had you not shown up!



Fortunately, you can trust one company to protect it.

Information. Created and shared in astonishing quantities and formats. Fortunately, you can partner with Iron Mountain to customize a Compliant Records Management program that meets these complex information challenges. We're the trusted partner of over 90,000 companies around the world, and we'd like to talk with you. Please call 800-899-IRON, or visit www.ironmountain.com/crm.



Records Management | Data Protection and Disaster Recovery Services | Secure Shredding | Digital Archiving
Electronic Discovery Support Services | Health Information Services | Document Management Solutions

© 2007 Iron Mountain Incorporated. All rights reserved. Iron Mountain and the design of the mountain are registered trademarks of Iron Mountain Incorporated.



Message from the Great Northwest Region

Hello GNW Region Members,

We did it! In February, we held our first region-wide webcast program. Did you attend? Or did you listen to the recording at a later time perhaps? Either way, it was great. Members from every one of our chapters from Alaska to Oregon, Bellevue to Boise, were in attendance! The task to produce the whole event was no small undertaking indeed. Spear-headed by Committee Chair Alex Acevedo and GNW Communications Director Denise Simons, the committee, which included representatives from each chapter, put in a good deal of time and talent to making it all possible. And let us not forget Ember Krumwied for her great presentation on GARP. It is amazing what can happen when a talented group of people work together towards a goal.

But webcasts, monthly programs, conferences, even our very chapters don't happen without people who are willing to volunteer. We need you! Why volunteer, you ask? Why not? I have been saying this for years and I will go on saying it. The more you put into your ARMA involvement, the more you will get out of it. I have never been paid either on the chapter or the region level for my sixteen plus years of service to ARMA. But I have been richly rewarded. I have gained knowledge, skills, credentials, and lifelong friends. I urge you to volunteer in your chapter!

Our annual Great Northwest Leadership Conference is only a few months away. This year, we will be in Portland, Oregon, June 3 and 4. More details will be coming soon, but I can assure you, this is one you don't want to miss. Mark your calendars now!

Every year, I open the Leadership Conference with "Good Morning GREATEST Northwest Region!" I truly believe that. We may not be the biggest region. In fact, I think we may be the smallest. But through planning, innovation, and great volunteers and members like you, we really do lead the way. Believe me when I tell you this, Region Managers do like to brag a bit about their regions. You all give me so much to brag about.

Marc Simpson
GNW Region Manager

FREE

WHITE

PAPERS

For Industry Sponsored Content Whitepapers, go to

<http://www.arma.org/publications/whitepapers/industry.cfm>

Access the Right Solutions



The Records and Information Management services of Access are now available in Oregon.

- Records storage & management
- Imaging and web-based electronic document management
- Data protection services & media rotation
- Secure destruction of documents, media, hard drives and products

Learn more about the superior quality and cost-effective solutions Access offers at:

www.accesscorp.com



ASK THE CRM

BOB DALTON, CRM

DEVELOPING AN INDEXING SYSTEM

Question: I would like to develop an indexing system to use as a finding aid for retrieval of my department records. Do you have any suggestions?

Response: This is not an uncommon question from personnel working in small to medium-sized organizations, and in particular within organizations without a formal records management program.

I also remember that this question was asked by students in the File and Database Management class that I taught at a local community college.

One of the first things you need to ask yourself is; “Do I need an index?”. The answer is: “depending on the complexity and/or the type of the records system you have developed”. Some collections may be accessed without the use of an index. A “direct access system” allows one to go directly to the files without the need of an index. Geographical and client records filed in alphabetical order are an example of a “direct access system”. An “indirect filing system” or alphanumeric system is based on a special code. In either case, an index of some sort may be necessary locate and retrieve files. Photograph files and engineering drawing systems are examples of records that may require an index.

Over the years, I have seen a wide variety of indexing schemes using Microsoft Word, Excel, Access and formal records management programs developed by commercial firms to manage corporate records. Each (Word, Excel, Access and their counterparts in Lotus SmartSuite – Lotus 1-2-3, Word Pro, Approach) may be utilized to develop an indexing scheme. It all depends on what you expect of the index; i.e., the amount and/or complexity of detail required and the retrieval needs of the users of the records.

Let’s consider an example: you may easily develop a table in Microsoft Word that has a file code or numbering scheme, titles, authors and dates. You may use the Edit/Find button to locate records within the search parameter. Microsoft Word could be a simple solution for a small collection.

Microsoft Excel may also be used quite effectively in managing collections of files. It also has some other attributes for indexing, sorting, data entry input and printing of indexes that are lacking in Microsoft Word.

For organizations that have a need for a more complex system or multiple systems to manage their records and cannot obtain funding to purchase a full-fledged document management system I recommend evaluating Microsoft Access. In a perfect world, in my opinion, the organization would be using Microsoft Office as their company standard. If Microsoft Office is the standard and the agreement includes Microsoft Access as part of the software package, you may have hit a mini jackpot. The big jackpot; the Information Services Department also has technical staff with experience working with Access and can support your requirements!

If Information Services staff cannot support you by assisting in the development of a filing system, but is willing to administer the software (maintenance, upgrades, backups, etc., the technical stuff, but you still want to pursue the development of a system, ask the following questions:

1. Do I have the computer skills to proceed with this project?
2. Do I have the time to develop a system?

Continued on next page

If the answer is yes to both questions, you are on your way to starting the development of a system.

If the answer to question #1 above was “no”, do you have the time and patience to learn? If yes, proceed. If not, you might want to back off and try using Word or Excel.

If the answer to question #2 above was “no”, could you take the time to develop an indexing system? If not, you might also want to back off and try using Word or Excel.

If you still want to proceed but feel your computer skills may be lacking you might consider attending a course on Microsoft Access at your local college or purchase a textbook on Access at almost any bookstore to improve your skills.

I purchased a copy of a textbook titled “Microsoft Access 2000: Illustrated Series” by Lisa Friedrichsen (is this spelled right?), published by Course Technology, Thomson Learning, which is a Illustrated Introductory course in Microsoft Access. If you are able to complete the first seven chapters of this textbook, you should understand the basics of Access and develop a database.

I also purchased “Microsoft Access 2002; Fast and Easy”, published by Prima Publishing, 2001, at a local bookstore. Although the textbook is for Access 2000, the basics are still the same and I use it this book extensively when I run into a problem.

In my next article, I will discuss the database design and data fields selected for a generic database (to create an indexing system).

Part II

In the previous article, we reviewed some requirements that would be needed to develop a simple indexing system using Microsoft Access. The basic requirements are: (1) computer skills and (2) time to develop a system. In Part II, we will discuss designing a simple database that may be used to manage a collection of records, on-site and off-site.

Again, I highly recommend purchasing document management software if at all possible in lieu of developing one in-house. A professionally designed document management system is a very complex program, developed by experts in developing software who are employed by companies that are in the business of providing this type of service.

The first and most important goal in developing a database/finding aid is identifying the pieces of information you want to capture. It cannot be over-emphasized how critical this phase of the project can be to the successful implementation and use of the database. You need to consider the following:

- What is the purpose of the database?
- Determine the types of reports you want to produce.

Write out the field names and what data type the record will be (date, text, currency, number, memo, etc.). Play particular attention and place the fields in a logical flow for data entry. Example: If your entering information from a form, you want to data entry in the same flow as the form entries.

Remember! Keep it simple and easy to enter data enter and manage the database. Do not be tempted to add additional of fields in your table just in case.

Continued on next page

The database we will develop will be a simple table in Microsoft Access that will allow the user to develop the basic information to:

- Produce reports (listings) of records in the database (by department, function, file code)
- Print file folder labels (some restrictions on this ability)
- Produce destruction notices.
- Produce transfer notices for off-site storage facilities or your state archives by modifying or adding fields to the database
- Searches by keyword

Here's an example of a table in Access design mode with the following fields and data types.

Field Name	Data Type	Description
Rcd_Id	AutoNumber	
Rcd_FileCode	Text	Alpha/Numeric Field
Rcd_Title1	Text	
Rcd_Title2	Text	
Rcd_Title3	Text	
Rcd_DateorSeqFr	Date/Time	Beginning Date/Sequence Range *
Rcd_DateorSeqTo	Date/Time	Ending Date/Sequence Range *
Rcd_Memo	Memo	Memo Field for expanded information
Rcd_Atch	Ole Object	Provide capability to attached pictures, documents, spreadsheets, etc.,
Rcd_Dept	Text	Department/Function Owner
Rcd_SysDt	Date/Time	Date entered into the system. Used for quality control and label creation.
Rcd_Status	Text	Records Status (Active, Inactive, Transferred, State Archives, etc.,
Rcd_TransDt	Date/Time	Date transferred to another location (Archives, Storage, etc.,)
Rcd_TransBC-Box	Text	Barcode Number or Box Number
Rcd_RevDt	Date/Time	Records Review Date of Inactive Records
Rcd_DestDt	Date/Time	Date Record Destroyed

You may want to create a separate field for each field, i.e, one for dates and one for sequence ranges.

Again, I am assuming that you have a basic idea of the definition of a field and data type. Simply stated they are: (1) Field Name: The name assigned to each field in a table, and (2) Data Type: the type of information that will be entered into the field.

If you have completed the table, exit and save the table, then open the table and try entering data into the table to see if you have the needed fields to effectively manage your records. Experiment with some of the capabilities of Microsoft Access and create forms, reports, queries using the Wizard function.

You can also duplicate (copy/paste) and change the field names from Rcd_*** to Box_*** to manage boxes stored in the off-site and on-site storage facilities. . . If you noticed, I start the field name with a specific identifier (Rec_*) to denote the table I am working with, for example; Rec_Status could be changed to Box_Status. At a later time you can learn to create a query to join the two tables to provide information for reports, etc.

Continued on next page

Following the guides of the books suggested in the previous article, you should be able to design a simple database as your document management system and provide you with a finding aid for search and retrieval of your business records.

Part III

In the previous articles, we reviewed some of the requirements needed to develop a simple indexing system and created a table in Access design mode with the fields and data types to manage a collection of records, on-site and off-site using Microsoft Access.

Again, I highly recommend purchasing document management software if at all possible in lieu of developing one in-house. A professionally designed document management system is a very complex program, developed by experts in developing software who are employed by companies that are in the business of providing this type of service.

In this article, we will show an example of simple data entry form and reports that utilized the query programs in Microsoft Access. If you are not a familiar with Microsoft Access, I recommend you use purchase the books suggested in the previous article. They should provide you with the tools necessary to develop the examples below and other more complex queries, forms and reports.

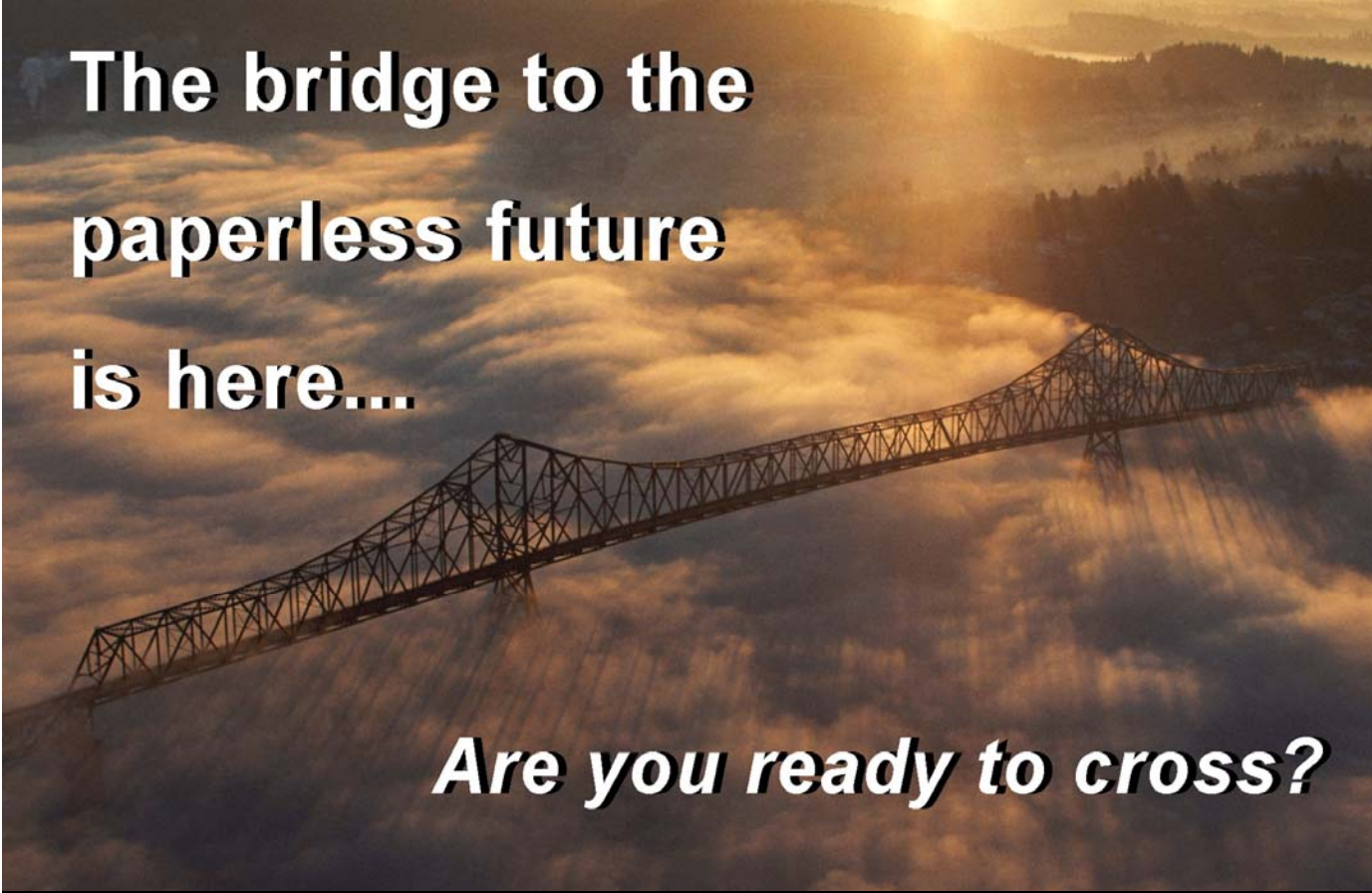
The example below is a data entry form developed to manage stored boxes. It has three additional icons at the bottom for specific functions to enhance the usability of the form. The first icon at the bottom left of the form is a duplication icon that allows the user to add a record, duplicate it, and only change entries that are different. The second icon to the right of the duplication icon is for search, and the STOP icon is used to exit the form.

Example—It contains the same data as used by the client's commercial vendor for transfer of boxes to their storage facility. You are probably asking yourself, why not use the vendors form? There is a simple answer. I hate to have to re-key anything. Once you have entered the box data into your system, you can use the information to create and print the information in a format acceptable to the vendor.

Using Microsoft Access query wizard the user should be able extract specific data that will provide the information necessary for creation of reports for management of the box collection. Some examples are:

- Extract and print the box database in barcode number (shelf location) or alpha order.
- Extract and print the box database information by Department or File Code.
- Extract and print reports for annual reviews for destruction.
- Create search and print queries for different type of records within the database for clients.
- Extract and print annual projection of storage usage based on current box storage requirements.
- Charts can be designed from the data in Access or exported to Microsoft Excel.
- All reports can be exported to Microsoft Word and/or the Microsoft Word merge program.
- Creation of Certificates of Destruction for boxes destroyed.
- Advanced user can design macros to send reports via e-mail.

The number of reports that can be designed and published is limited to the imagination and experience of the system user.

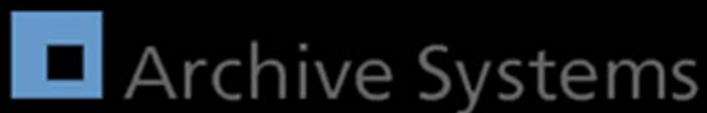


**The bridge to the
paperless future
is here....**

Are you ready to cross?

**Discover how Archive Systems is changing the way
Oregon manages documents.**

Everyone sees a future that is increasingly paperless, but paper continues to play a major role for every company today. Archive Systems delivers a bridge to that future by integrating digital technologies with state-of-the-art records management services. From business records storage and Virtual File Delivery to on-demand document management and accounts payable automation, we offer the services and solutions that will help you make the journey at your own pace.



23070 NE Townsend Way
Fairview, OR 97024
www.archivesystems.com

Business Records Storage | Secure Document Shredding | Offsite Data Storage
Virtual Records Center | On-demand Document Management | Imaging and Workflow Automation

OREGON CHAPTER OF ARMA INTERNATIONAL

Meeting/Seminar Registration Form

Legal Records Management

**Tuesday, April 12, 2011
12:00 p.m.**

**LOCATION:
Ernesto's ITALIAN RESTAURANT**

**8544 SW Apple Way
Portland, OR**

Click on <http://www.oregonarma.org/meeting.php?ID=139>

**Cost: \$20 for members with Meal; \$15 for Members without meal
\$25 for Non-Members with meal; \$20 for Non-Members without meal**

**Register online at OREGONARMA website
Phone: 503-972-2623 - Cheryl Dorman
FAX: 503-274-2908—Attention: Cheryl Dorman
Email: crd@inicigroup.com**

**Or Mail form to:
ARMA Oregon
P O Box 40004
Portland, OR 97240**

Name: _____

Phone: _____

Company Name: _____

Name(s) of Guests(s) _____

REGISTRATION DEADLINE:

Reservations required by April 8, 2011



Oregon ARMA
P. O. Box 40004
Portland, OR 97240-0004

www.oregonarma.org



OREGON ARMA OFFICERS

President	Cheryl Dorman crd@inicigroup.com	inici group, Inc. 3030 SW Moody Ave, Suite 104 Portland, OR 97201	503-972-2623 (O) 503-274-2908 (F)
Vice President Programs	Bruce Schinkelwitz, CRM bruceschinkelwitz@me.com	8868 SW Amicus Terrace Beaverton, OR 97007	888-901-3401 (O)
Vice President Facilities	TracieLyn Rydzewski tracielyn.a.rydzewski@intel.com	Intel 14533 Walnut Grove Way Oregon City, OR 97045	503-680-6974 (O)
Secretary	Debbie Baidenmann dbaidenmann@ci.beaverton.or.us	City of Beaverton P O Box 4755 Beaverton, OR 97005	503-526-2436 (O) 503-526-2479 (F)
Treasurer	Dwight D. Wallis, CRM dwight.d.wallis@co.multnomah.or.us	Multnomah County Records Management 1620 SE 190th Portland, OR 97223	503-988-3741 (O) 503-988-3754 (F)
Webmaster Director	Tyrene Bada tyrene.bada@pcc.edu	Portland Community College 12000 SW 49th Avenue Portland, OR 97219	503-977-8583 (O)
Newsletter Director	Jane McGarvin, MMC jmccgarvin@ci.oswego.or.us	City of Lake Oswego P O Box 369 Lake Oswego, OR 97034	503-635-0236 (O) 503-697-6594 (F)
Education Director	Kim Wollenburg kwollenburg@co.clackamas.or.us	Clackamas Water and Environment Services	503-742-4605 (O)
Membership Director	Kim Akimoto kimberlee.akimoto@gmail.com	TriMet 4012 SE 17th Avenue Portland, OR 97202	503-962-6489 (O) 503-962-3095 (F)
Immediate Past President	Timothy Hunt, CRM tim.hunt@portlandoregon.gov	City of Portland 1221 SW 4th Ave, Room 140 Portland, OR 97204-1987	503-823-4565 (O) 503-823-4571 (F)
2010-11 Great Northwest Region			
Region Manager	Marc Simpson msimpso@co.pierce.wa.us	Pierce County Public Works	253-798-3563
Region Coordinator	Jennifer Winkler jennifer.winkler@seattle.gov	City of Seattle	206-684-8154
Region Treasurer	Timothy Hunt, CRM tim.hunt@portlandoregon.gov	City of Portland	503-823-4565 (O)