



February 2012
Volume 43, Issue No. 6

2008-9, 2009-10, and 2010-11
ARMA International
Newsletter of the Year Award Recipient



For the Record
Newsletter of the Oregon Chapter

ARMA INTERNATIONAL—The Information Management Professionals

EMC (ELECTRONIC CONTENT MANAGEMENT) DIGITAL & BEYOND DISCUSSION

ALAN SMITH AND DWIGHT WALLIS, CRM

Date: Tuesday, February 21, 2012

Time: 12:00—2:00 p.m.

Location: Ernesto's Restaurant
8544 SW Apple Way
Portland, OR
(One block east of Jesuit High School)

NOTE: Because many of our members may have special plans on Valentine's Day, our February chapter meeting will be held on the 21st.

Cost: \$20 members; \$25 non-members

Program Description: This year's topics at Chapter meetings will be based on the G.A.R.P.® (Generally Accepted Recordkeeping Principles).

PROGRAM DESCRIPTION:

Alan Smith, Vice President of Programs, and Dwight Wallis, CRM, Treasurer, will speak on the topic of Electronic Content Management-Digital and Beyond Discussion- Exploring what it takes to move to a digital world.

Alan will briefly discuss programs he has been working on at Oregon PERS, and Dwight will talk about the County's recent project to convert the County's e-mail from an Outlook/

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www.oregonarma.org

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Exchange environment to Google Apps. This involved analyzing the records management capabilities, facilitated agreements between Records Management, Information Technology, and the County Attorney's Office, and developing a migration plan which included "big bucket" retention policies. This is a case study in cloud computing and electronic records management.

There will also be time during the program for questions and discussion by attendees.

SPEAKER BIOS:

Alan Smith joined PERS as the Records Officer for the agency in July 2004. He is responsible for all Document and Record Management activities, public record request processing, desktop technical support, production control, and image capture. The agency is currently going through major changes in the handling and management of information. Alan's responsibility in this new direction is to manage the life-cycle of information from a variety of media sources.

He holds a bachelor degree in Business Management from Marylhurst University in Marylhurst Oregon, just up stream from Portland and is a member of ARMA.

His experience in the field of Information Management span 37 years with 21 year of that in the United States Air Force providing support in Records and Document Management, Publication and Forms Development, and Information Strategic Planning arena's.

After his retirement from the Air Force in 1995, he joined Stream International as part of the Senior Leadership team. The company provided high end technical support solutions to worldwide customers.

Dwight Wallis, CRM, has been a part of the local records management/archival community since 1978. After stints in the City of Portland and Clark County, he has served as the Records Administrator of Multnomah County for the past 23 years. During that time, he has been involved in a wide range of electronic records issues, from the first email policy meeting of the early 90's, through numerous digital conversion projects, to the County's recent move to Google Apps and the cloud.

MENU CHOICES—Please indicate choice of entre when making your registration.

Ravioli - Meat stuffed ravioli with Italian meat sauce

Spaghetti with Italian Meat Sauce - Pasta covered with meat sauce

Vegetarian Lasagna - Pasta layered with fresh vegetables and cheeses covered with marinara

Manicotti - Pasta tube filled with ricotta cheese, covered with marinara sauce and cheese

Ernesto's Restaurant
8544 SW Apple Way
Portland, OR

(Apple Way is one block east of Jesuit High School off Beaverton Hillsdale High-



ARMA ADVENTURES

TYRENE BADA, PRESIDENT

"For every season...there is something happening with ARMA!"

Winter 2012

I love snow days. For me, it means staying at home, watching movies, drinking hot cocoa, and not going to work! While I didn't get any snow days from work during the brief bout of storminess in January, I had to make the difficult decision to cancel the January Chapter meeting. This made me sad. ARMA isn't "work" for me, and I missed seeing my good friends and colleagues. I hope all of you were able to keep warm and safe during those few treacherous days. The topic for the cancelled meeting seemed to be quite popular among those who were going to attend. This is why we have combined the January and February topics together for the February meeting.



The second meeting for the CRM Study group will be on Saturday, February 18, from 10 a.m. to 12 p.m. We will discuss Part One of the CRM Exam. Check out the ICRM website for a bibliography to help you study: <http://www.icrm.org/wp-content/uploads/2011/06/Bibliography-Rev-10-Spring-2010.pdf>.

It's not too late to join us! Email me (president@oregonarma.org), and I will add you to the list.

Spring 2012

The Great Northwest Regional conference will be held in Boise on March 12 and 13. Will you be there? This conference is the perfect opportunity for you to learn the latest trends in Records and Information Management, to network and meet some of the "big fish" of ARMA and the RIM profession, and to study for the CRM examination. If you register before February 29, you can save \$50 off the registration price. The conference hotel is the Marriott, and the group rate is only \$92 a night. For more details, visit armagreatnorthwest.org.

I love ARMA Conferences. I always "geek out" and will literally visit every vendor booth to see what tools are available, and I will listen intently to the keynote speakers and in the educational sessions. But what I love the most is meeting new people. In the few years I've been a part of ARMA, I have met many people who have shared my frustrations, and have given me invaluable tips for my career. If you are new to ARMA, don't be shy. In fact, let me give you a tip for how to meet someone at an ARMA Conference. Approach your soon-to-be-new-ARMA friend and say, "Hello, my name is _____. I work in the _____ industry. Do you know what GARP is?" If the person knows what GARP is, you'll learn more about it! If the person doesn't know what GARP is, you may learn a new way to cook a fish. It's a win/win situation either way, right?

Summer 2012

Last summer, members of our chapter marched in Portland's Starlight Parade. We all had such an extraordinary time that we will make this an annual tradition! (Search "ARMA Starlight Parade" on YouTube and check out a video.) This year's parade will be on Saturday, June 2. Anyone from the chapter is invited to join us, so mark your calendars! *(See picture on next page)*



MEMBERS ONLY

FRANKLIN MILTON AND KIM WOLLENBURG, INTERIM COMEMBERSHIP DIRECTOR

Hello Oregon ARMA Members! Here is the membership update for January 2012:

Congratulations to Oregon ARMA members celebrating membership anniversaries!

20+ Years: Lynn McDermott – Cowlitz County Law Enforcement

15 Years: Linda Buss – Assess Sciences Corp

10 Years: Ellen Domaschofsky – M Financial Group
Susan Warnke – Evergreen School District

5 Years: Erin O'Meara – Knight Library
Mike Francioch – Open Text Corporation

1 Year: Patrick Kelly – Recall Total Information Management
Anne McCallister – Inside the Box Organizing
Trevor Medina – Student – Emporia SLIM



2011 Portland Starlight Parade
Oregon ARMA entry—pirates
ready to attack SS ARMA (filled
with sensitive documents)

*OREGON ARMA won ARMA
International's Special Project
Award in October at Washington,
D.C.*

Newsletter Editor—Jane McGarvin

Tyrene Bada, Chapter President

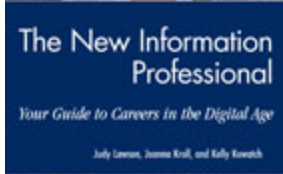
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Printed in the U.S.A.



CHECK IT OUT

KIMBERLY WOLLENBURG DIRECTOR OF EDUCATION



The New Information Professional: Your Guide to Careers in the Digital Age

Judy Lawson, Joanna Kroll, and Kelly Kowatch

ISBN: 978-1555706982

Trade Paper

240 pages

2010

Description: This book's progressive approach, unmatched scope and up-to-date guidance will open the doors to a wide range of exciting information-age careers to undergraduates, high school students, parents, and advisors along with Information students and recent graduates who are interested in exploring emerging career paths.

Written by a team of seasoned career services experts at the University of Michigan, one of the nation's leading schools, this exceedingly comprehensive new resource provides in-depth coverage of career opportunities in eight core information fields, including:

- Archives and preservation management
- Human computer interaction
- Information analysis and retrieval
- Information systems management
- Information policy
- Library and information services
- Records management
- Social computing

Chapters are clearly organized by field, and each one includes a fully-fleshed description, real world profile, education and training programs, example job titles, illustrated career maps, and online resources for additional exploration. There is also an invaluable chapter on career planning that covers self-assessment, career-decision making, networking, and job search strategies.

I'm so excited! We have new books in our library! The one featured this month is just one of 12 new books that have just arrived. I will be adding them soon to the online inventory and will feature each new book in the newsletter each month. You will be able to find the list of new books at <http://www.oregonarma.org/library.php>. Please give me a few days to get them up as I just got them. I hope you'll find our new resources valuable additions to our library.

TENTATIVE SCHEDULE OF CHAPTER MEETINGS, TOPICS

(subject to change)

February 21, 2012	Electronic Content Management (Digital and beyond)
March 12-13, 2012	Great Northwest Region Conference in Boise, Idaho
March 20, 2012	Exploring Careers in Information Management - Open Forum with goal that explores the various opportunities in the Information Management Profession and industry.
April 10, 2012	Frank Milton - Topic to be determined
May 15, 2012	Advancing Oregon ARMA - Year End Round Up - Forum on how to promote Information and Record Management Practices to a wider audience

AIIM Oregon will hold their meeting on February 29, from 2 to 4 p.m. at McMinamins Kennedy School, 5736 NE 33rd Avenue. The Program title is Mobile Computing and Extensions to the Cloud-Based Environment. The ECM world has been vastly redefined by the emergence of the cloud-based paradigm and the ability to upload, stored, search and retrieve documents from strategic cloud-based repositories. Cloud applications have been further enhanced through the use of mobile devices such as the iPad, Droid, and Blackberry to access and store documents in the cloud. AIIM Oregon has prepared a cutting-edge presentation which will explore the boundary between the cloud application environment and the mobile user community and specifically how users can access, search, and retrieve content on a virtual basis regardless of location from any industry leading cloud environment. Cost is \$10 for members and \$15 for non-members.

For more information, contact Alister Ramsay at aramsay123@aol.com, or at 425-681-4689, or to register, go to <http://www.AIIM.org/Chapters/Northwest/>.

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

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Message from the Great Northwest Region

It's Region Conference time! Or very close to it. By now the brochure for the Region Conference should have worked its way to your inbox or mailbox. I hope you will be able to join us in Boise, Idaho, for this fantastic educational opportunity. This is also a great opportunity for networking with fellow RIM professionals. Mingle with peers at the Welcome Party, talk cloud storage at dinner on Monday night or commiserate on your SharePoint implementation during the breaks! For more information, please see the Great Northwest Region website at <http://www.armagreatnorthwest.org/>. And if the conference isn't enough reason to travel to Boise, visit <http://www.boise.org/visitors/> and learn about some of the cool things to see and do in Boise (I adore zoos and aquariums so I think you'll know where to find me during our off-time!)

ARMA has a lot going on right now: there are several webinars available at the webpage as well as whitepapers on Information Governance. If one of your New Year's resolutions was to learn more about a specific RIM topic for use at your workplace, ARMA is a great place to start researching. One of our work plan items for the City Records Management Program is to review GARP and how our program stacks up to the principles. I'm hoping it will help show us where we should concentrate on improving services to City employees and educational opportunities for staff.

This February marks one year since I was diagnosed with breast cancer and started a fight I never thought I would be in. I'm happy to say that all recent blood work came back clear and all seems to be fine, so I'll be around in ARMA for a while more! My ARMA family was a big help and support to me and my family during the past year of chemo and radiation. From notes to support, to your donations to the Overlake Cancer Center, to the three wonderful gentlemen (Marc, Bruce, and Dave) who offered up their heads to be shaved as a fundraiser (at last year's Leadership Conference in Portland, Oregon), it truly meant a lot to me. I'm so glad to be a part of ARMA, and a part of the greatest region: Great Northwest!

Hope to see all of you in Boise in March!

Jennifer Winkler, Manager
Great Northwest Region
ARMA International

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“ASK THE CRM”

BOB DALTON, CRM



Part III – Creating a Database with Access

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 needed to manage a collection of records, both on-site and off-site, using Microsoft Access.

In Part III of this series, we will create examples of simple data entry forms and reports that utilize the query and report wizard function in Microsoft Access. If you are not familiar with Microsoft Access, I recommend that you purchase the books suggested in Part I and Part II. They should provide you with the tools necessary to develop the examples below and other, more complex queries, forms and reports.

While I am currently using Microsoft Access 2007, my clients are using both 2003 and 2007 versions. Once clients upgrade their systems to Microsoft Access 2010, I will upgrade my system.

The book that I often use as a resource for Access is “Microsoft Access 2000 Illustrated Introductory”, by Lisa Friedrichsen, because of the excellent examples shown on the development of Queries. Also, in previous articles I noted that I am a very visual learner. I need to see how the program works to understand it.

Forms

Forms are created to provide an easy-to-use data entry screen for each record being entered into the database. The Figure below is a data entry form developed to manage boxes in a storage facility (on-site or off-site) and created in the design mode based on the attributes of the box table. Note that the form flow is exactly in the same sequence as the box data table shown in Part II.

Once you have created the form, you may also add other tools that will enhance the functionality of the form. Examples are:

- A duplication box that will allow you to quickly duplicate the current entry so you can modify only the information that is changed.
- A print box that will print a copy of the form of the record you have entered into the system.
- A search box that will allow you to search the box database to find specific records within the fields selected.
- An exit box to take you to another menu and/or exit the database.

Continued on next page

Box Storage Data Entry Form

Box_ID	Box_BC	Box_FileCode	Box_Dept
1	11111	704	Planning
Box_DateFr	Box_DateTo	Box_SeqFr	Box_SeqTo
1/1/2001	12/31/2001		
Box_Desc1 Database Planning Project - J2001-01			
Box_Desc2			
Box_TransDate	Box_Status	Box_RvwYr	Box_DestDate
1/1/2004	1	2012	

Figure 1

This form contains the same data used by a commercial vendor for transfer of boxes from your office to their storage facility. You are probably asking yourself: 'why not use the vendor's 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 data in a format acceptable to the vendor.

Queries

A query provides the user with a spreadsheet view of selected fields created in the tables in Part II. The use of queries enables the user the ability to create a listing (datasheet) of specified fields and records from one or more tables. With practice, you should develop the skills to edit, navigate, sort, find and filter a query's datasheet and save the query for future use. You will find it specifically helpful in the development of reports.

Using Microsoft Access query wizard you should be able to 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 of records.
- Create search and print queries for different type of records within the database for clients.
- Extract and print annual projection of storage needs 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 (.doc), Adobe (.PDF), and other formats.
- Creation of Certificates of Destruction for boxes that have been destroyed.
- Advanced user can design macros to send reports via e-mail.

Continued on next page

In the Figures below, we used the Query Wizard and selected 6 fields from the **Box Table** that we developed in Part II of this article.

Field	Box_BC	Box_FileCode	Box_Dept	Box-DateFr	Box_DateTo	Box-RvwYr
Table	<i>Box Table</i>	<i>Box Table</i>	<i>Box Table</i>	<i>Box Table</i>	<i>Box Table</i>	<i>Box Table</i>
Sort						
Show	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Criteria						
or						

Figure 2

When you run the query, a listing of all records in your system would be reflected as shown in Figure 3 below:

Box_BC	Box_FileCode	Box_Dept	Box-DateFr	Box_DateTo	Box-RvwYr
11111	704	Planning	1/1/2001	12/31/2001	2012
11112	101	Actg	1/1/2004	12/31/2004	2011
11113	402	HR	1/1/2004	12/31/2004	2011

Figure 3

By inserting requirements (sort, show and criteria) in the Query in design mode you can select specific information as reflected in Figure 4 below:

Field	Box_BC	Box_FileCode	Box_Dept	Box-DateFr	Box_DateTo	Box-RvwYr
Table	Box Table	Box Table	Box Table	Box Table	Box Table	Box Table
Sort		Sort Ascending				
Show	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria						"2011"
or						

Figure 4

When you run your Query, it will reflect only the fields marked in **X** in Show and boxes with Review Year of 2011 as reflected below:

Continued on next page

Box_BC	Box_FileCode	Box_Dept	Box-RvwYr
11112	101	Actg	2011
11113	402	HR	2011

Figure 5

The Query function in Microsoft Access is a powerful tool for the user in the management of their document management system. Each Query can be saved, re-opened in Design mode and the criteria changed to suit the user. The results can be exported in different formats (Word, PDF, HTML, etc.), printed and/or sent via email. The Queries are also used when creating reports as shown in the next section.

Reports

The report function provides the user with the ability to design professional printouts of selected data that may contain such things as a report title block (headers), page number (footers), calculations, on the records selected from the tables and queries developed earlier. The number of reports that can be designed and published is only limited to the imagination and experience of the system user.

Using the Report Wizard you can select fields in Figure 6 from the **Box Table** to create a simple report on the boxes currently in storage as shown in Figure 7.

Field Name
Box_BC
Rec_FileCode
Box_Dept
Box_DateFr
Box_DateTo
Box_Desc1

Figure 6

Boxes in Storage					
11113	HR	402	Personal Services Contracts	1/1/2004	12/31/2004
11112	Actg	101	Accounts Payable	1/1/2004	12/31/2004
11111	Planning	704	Database Planning Project -	1/1/2001	12/31/2001

Figure 7

Continued on next page

Some of the reports that can be created are:

- Listing of all boxes in storage by department, barcode, file code, and destruction year.
- End of year reports to departments with listing of boxes that are due for destruction review in accordance with the organization's retention schedule.
- End of year report to departments of all boxes currently in storage for their unit.
- End of year report on boxes in storage for budgeting purposes.
- Design and creation of destruction notices when joined as a query with the **Retention** and **Box** tables reflected in Part II.

- Creation of listing of boxes approved for destruction by the owner that is provided to the outside commercial storage vendor for the destruction of the boxes. The cover sheet also requests that the vendor provide a certificate of destruction of all boxes on the listing. The listing is then matched against the destruction certificate to insure all the boxes are destroyed. The **Box** table in your database is then updated to reflect the destruction date provided on the certificate of destruction using a global update in the query design mode.

Other Fields that could be added to the Retention Table are:

- A Field to denote secondary titles being used by the organization within the record series. Remember, there could more than one type of record within the primary title with different retention periods. Example: More than one type of Contracts and Agreements.
- Add a functional field to denote the primary user/owner of the record series. For example: Accounting/Finance, Human Resources, Parks & Recreation, Marketing
- Add Field for a retention period for secondary record copies. Remember other departments may have a copy of the record that can be destroyed when it is obsolete or superseded.

Note: For the purpose of this article, the examples (figures) are all created in Portrait view, while I prefer to use Landscape to permit additional information.

The following report is an example of a simple File Classification and Retention Report extracted directly from the Retention Table using the Report Wizard.

Continued on next page

File Classification and Retention Report					
101	Accounts Payable	GS50-03A-02	ACCOUNTS PAYABLE AND RECEIVABLE SUPPORTING DOCUMENTS AND REPORTS	3 years	WA
402	Contracts & Agreements	GS50-01-11 Rev. 1	CONTRACTS & AGREEMENTS	Retain for 6 years after termination or expiration of instrument	WA
704	Engineering Project Documentation	GS50-13C-02	CONSTRUCTION & PLANNING PROJECT FILES PARKS AND RECREATION	Completion of project plus 6 years	WA

Figure 8

Reports, like the queries, can be exported in different formats (word, PDF, HTML, etc.), printed and/or sent via email.

It must be noted that the tables established in Part II were created to work independently. To have the ability to join two different tables to create destruction notices, one field in each of the tables (**Rec_FileCode**, **Box_FileCode** and **Ret_FileCode**) have to be changed to read **File-Code**. This will then provide the ability to join two different tables to create additional reports.

As an alternative to the development of the box database, your commercial record center vendor may provide clients access to data enter the box information directly into their system. I would check to see if they offer the service and costs associated for the user. In addition, their system may have the ability to do searches and provide reports such as:

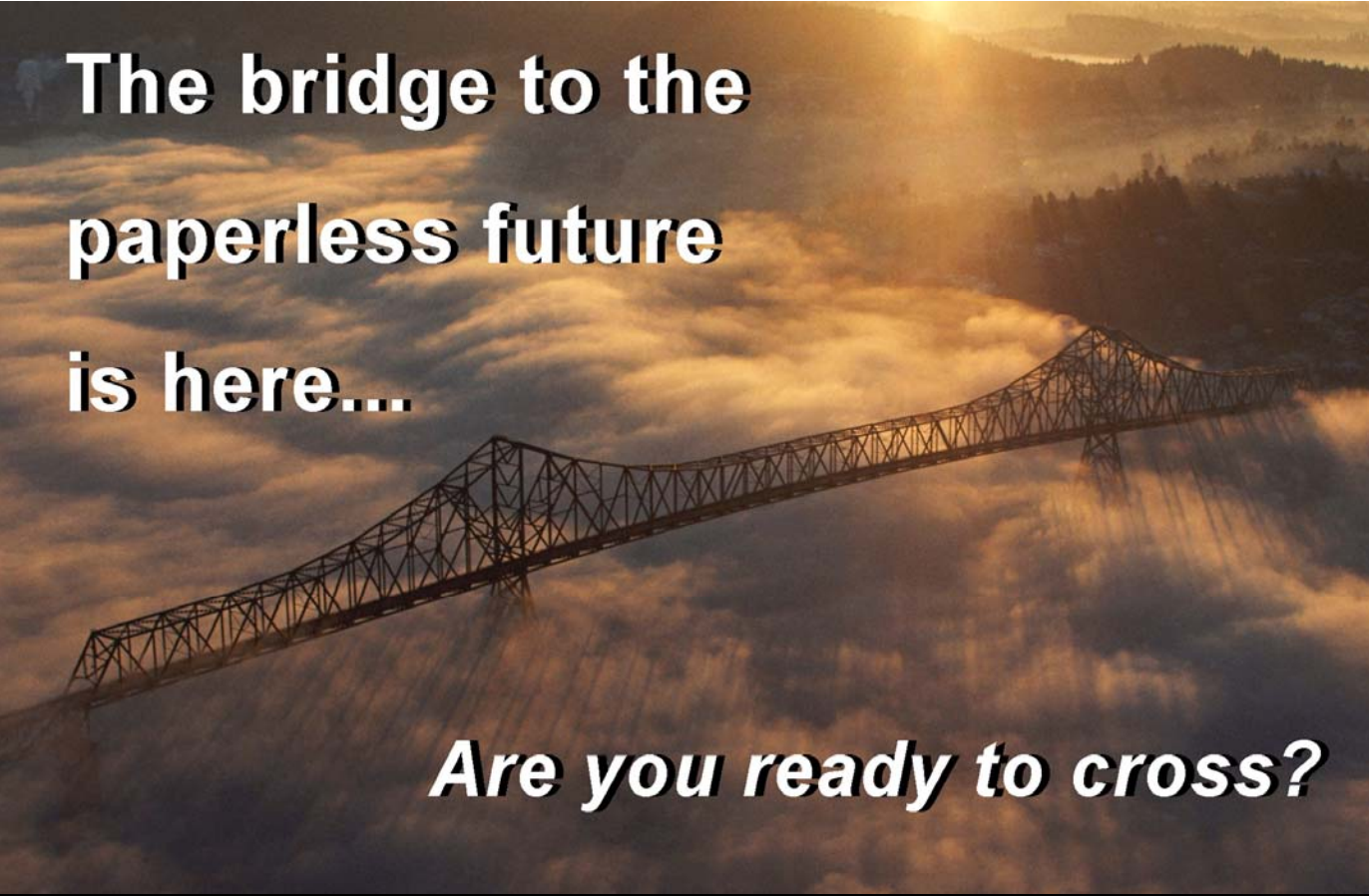
- Total listing of boxes in their system by barcode number, titles, file codes
- Reports for use in your review for destruction by department.
- Reports of searches conducted for clients.

In closing, for organizations that may have the need for a system to manage their records and cannot secure funding for a professionally developed document management system, I recommend evaluating Microsoft Access.

I hope the resources contained in this three part article are useful in your development of a system to manage your business or agency records.

Bob Dalton, CRM of Dalton Consulting

Note: My thanks to editor, Barbara Werelius, Records Manager and Guru at the Tacoma Public Utilities for her assistance in the development of this article. Other articles by Mr. Dalton can be reviewed and copied at his BLOG site: askthecrm.blogspot.com.

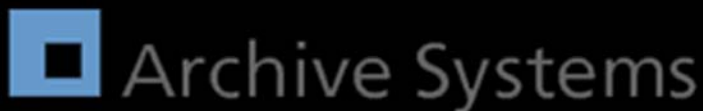


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OREGON CHAPTER OF ARMA INTERNATIONAL

Meeting/Seminar Registration Form

**EMC (Electronic Content Management)
Digital & Beyond Discussion
ALAN SMITH AND DWIGHT WALLIS, CRM**

**Tuesday, February 21, 2012
12:00 to 2:00 p.m.**

LOCATION:

**ERNESTO's
8544 SW Apple Way
Portland, OR**

Click on <http://www.oregonarma.org/meeting.php?ID=156>

**Cost: \$20 Members; \$25 Non-Members
*INCLUDE MENU SELECTION WHEN REGISTERING***

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Email: president@oregonarma.org**

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

Name: _____

Phone: _____

Company Name: _____

Name(s) of Guests(s) _____

REGISTRATION DEADLINE:

Reservations required by February 17, 2012

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