iQ / THE R·I·M QUARTERLY

Professionals Australasia

Business + RIM + ICT = Strategic success

See more at www.rimpa.com.au

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DAVID PRYDE, MRIM

Chairman of the Board,
RIM Professionals Australasia

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The role of relationships in strategic success

> I was watching *60 Minutes* last night and the second story was about people being addicted to their Smartphones. The two main concerns were that these people are losing the ability to communicate in anything other than short succinct bursts (txt speak) rather than being able to construct more complex sentence structures.

The second worrying factor is the reliance we have on our phones and the addict's inability to cope with isolation, being 'cut off' from 'the source' or not being able to find basic information without the technology or the supporting apps. In fact some are too afraid to turn the things off at night in case they miss some life-changing issue.

Sociological concern lies with being 'connected' 24/7 – if we are at the beck and call of our customers, employers, friends and telemarketers all the time – when do we get down-time to rest and relax?

DOES 'REAL TIME' IN OUR TIME EQUATE TO ALL THE TIME?

Is the technology that is supposed to make our life easier, which supposedly buys relaxation time back for us, really only contributing to our early demise by making us work longer or rest less? Life is about finding balance between work and relaxation, family and friends, God and voluntary interests – and that balance is different for everyone. Try as we may – we can't function for long when any of these core fundamentals are missing.

Being available 24/7 also limits the time available to consider issues and problems carefully, so that unless we are strict in making time to fully think things through – we can be pushed into poor decision making by not having all the information. Doesn't that go against basic, core information management doctrine?

We are seeing in our own professional community a willingness to develop more internet-based tools as definitive and authorative sources because they are cheaper to provide and can be directed to a wider audience in less time – RIM Professionals Australia is no different and we are constantly striving to provide more resources to members.

There is nothing wrong with giving users the tools to make better decisions, improve efficiency and reduce overheads – but I have this niggle in the back of my mind about what are we giving up or is there a negative side-effect to all this development?

My thoughts turn immediately to two things:

- Are we becoming too reliant on internet tools, the cloud and mobile access?

- What is happening to the people side of the information equation?

People! Organisations like RIM Professionals Australasia are built on the foundation of people sharing their ideas with others. You can do that easily online – get all the help you want but how do you validate what you have found, how do you filter all the text and images to identify what is best for your organisation without looking into someone's eyes and seeing evidence of the passion behind it.

Strategic success will only come to those who throw as much effort into building relationships with partners as they do on technology. Technology is a good thing when it is the 'tail' that wags to its master's tune, not the tail that tries to wag the dog.

People are the most important asset of any organisation; they might not react with the speed of a microprocessor in an iPad but they have contextual and historical knowledge that can add priceless value to every situation and decision. Let me leave you with my model for success.

**Relationships
Business + RIM + ICT
= Strategic Success**

Congratulations to our newly elected Branch Councils and welcome those new Councillors serving for the first time. Being a volunteer and serving the membership is a far more rewarding experience than anything you may be asked to do over the next 12 months.

I appreciate the time, commitment and energy that takes place at Branch level for the benefit of members and the edification of the profession.

Sad as it may be, we need to recognise that some members have not returned to Branch leadership this year and I want to acknowledge them in this forum and say thank you for everything you have done while on a Committee – the Branch and the Company are a better place through your efforts.

Good luck in your future endeavours and we look forward to seeing you at events and in the RIM Community.

David

From the CEO

KATE WALKER
FRIM MAICD AMIM, MBA, BSC (BAdm),
AdvDipBus (Rkg), DipBus (Adm)

Chief Executive Officer,
RIM Professionals Australasia

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Professionals Australasia

Are you getting the most from your RIM Professionals Australasia membership?

Have you ever wondered why some people get more out of professional associations and networking groups than others? I've seen time and again that it's simply not enough to pay your membership fee and hope for the best.

Even going to one or two events a year won't get you very far in most cases. Sure, you may meet some terrific people, but unless your profession is uniquely non-competitive, or you make an overwhelmingly positive first impression, it's unlikely that much will come of it. You make an investment of both time and money when you join a group.

Here are a few tips to easily make the most of your investment of time and money:

- Don't join every association available – maximise your experience by going for depth of involvement.

- Attend meetings and events regularly. Build a base of support with regular members and position yourself with new members as someone in the know.

- Join a Committee (or Branch) – take a leadership role in the Association and interact with members at a more meaningful level. Show them what you can contribute.

- Raise your visibility. Offer to organise an event, round up a speaker or greet people at meetings.

- Invite staff and colleagues. Share the learning and experience. It can be a win-win for you, your staff and the Association.

If you're working in the records and information management profession, RIM Professionals Australasia provides you with a great opportunity to build your skill-set, develop strong networks and demonstrate your commitment to ethical practice.

GET CONNECTED AND GET INVOLVED WITH OUR COMMUNITY

- Come along to our networking events to meet and mingle with industry peers and build contacts.

- Make the most of our affiliation with organisations around the world.

- Discuss industry issues or just say hello through our social networks.

- Join and/or create special interest groups and chapters based on your interests.

DEVELOP YOUR PROFESSIONAL SKILL SET TO ENHANCE YOUR CAREER

- Make the most of professional development opportunities involving national and international speakers.

- Make the most of discounts on training through our Professional Development Program.

- Search for presentations, research, case studies and more in our members' resources.

- Read the latest articles from *iQ* – the RIM Professionals Australasia Quarterly.

- Access iRMA which contains refereed articles and case studies.

- Discounts at our online store, industry events and inForum (our annual convention).

- Earn credibility by sharing your knowledge (offer to present and/or write an article).

BE RECOGNISED AS LEADERS IN THE INDUSTRY

- Become a professional member.

- Participate in the professional CPD program (professional members only).

- Be invited to sit on committees (local, national and international) relating to legislative and standards awareness, education, professional development and more.

DEMONSTRATE YOUR COMMITMENT TO ETHICAL PRACTICE

- Gain industry credibility and confidence in your commitment to ethical practice.

- Use the opportunity to display post nominals *ARIM/ MRIM/FRIM* after your name to demonstrate your professionalism (professional members only).

KEEP UP TO DATE WITH THE LATEST NEWS AND JOBS

- Receive e-communication with the latest industry news and information.

- Become a social media member (Listserv, Forum, Facebook, Blog, Wiki).

- Browse RIM Professionals Australasia's job vacancies.

MAKE THE MOST OF OTHER FANTASTIC MEMBER BENEFITS

- Develop your skill set and career potential through participating in RIM Professionals Australasia's mentor program.

- Gain access to scholarships.

- Save by using member discounts.

- Member marketing materials (posters, pens, etc.).

- Surveys (including benchmarking surveys).

- Have a voice!

The following article provides a practical demonstration of involvement with professional associations:
http://www.greatin8coaching.com/_blog/Great_in_8 Coaching%E2%80%94All_Things_Career/post/There_are_Ways_ and_There_are_Ways_How_to_Get_the_Most_out_of_Working_ with_Professional_Associations_for_Career_Advancement/
JOAN TABB – MONDAY, OCTOBER 03, 2011

How to get the most out of working with professional associations for career advancement

Person A

Person A is a recent college graduate with a degree in engineering. She is advised to get involved with a professional association as a way to make connections to launch her career. She diligently goes online and finds an engineering organisation near her and also finds an upcoming program in her area of interest. She enrols online, pays the $35 event fee and feels good that she is making progress. She drives to the event, signs in and awkwardly heads into the meeting room and, knowing no-one, looks to buy a glass of wine ($5) and get some cheese and crackers. She nods hello to a couple of people standing around, then heads to the presentation area. The talk is somewhat interesting and when it's over she tries to talk to the presenter but there are many people ahead of her, so she calls it a night and goes home. Zero leads. Zero connections. And she has spent $40 on entry and wine and about $10 on gas. Not a profitable or productive strategy for her job hunt!

Person B

Person B has the same new engineering degree and was also advised to get involved with a professional association. But she had been given more comprehensive advice. After she researched to find a relevant and local professional association, she was also advised to identify the leaders of the local group and contact them personally. They are volunteer leaders and are typically very interested in helping prospective members, especially younger entry level professionals, and they also want to boost the group's membership by being helpful and accessible. So when she calls both the membership chair and the Vice President of Programs, both offer to introduce her to other members. She also shared with them what kind of positions she was interested in, some of her top skills and achievements, and a list of her target companies. She explained that she really would like to meet people who worked at those companies. The VP Membership was impressed with all of her preparation and gave her a waiver on payment for the first event and suggested they meet a few minutes before the event to become better acquainted. She has also been coached to offer to volunteer her services to the organisation. She is advised that in the career building process, the best approach is to give and to take; to show that she understands reciprocity and, even though she is a newcomer, there are probably ways she can assist. In fact, the VP Programs appreciates her offer and suggests she work the registration desk to both help the group and as a way to meet other members.

So when she shows up at the event she has two people who are waiting to meet her! They even have a badge prepared with her name on it and she is now an official part of the group as a volunteer. They introduce her to several people and, by the time the program starts, she has collected half a dozen business cards and a couple of job leads as well. She also knows to extend LinkedIn invitations to everyone she meets. In fact, after the second event she attended she made contact with a manager in an engineering firm on her target list.

There was an opening and, by building a relationship with that hiring manager through the bond of the professional association, she was able to get her resume in directly, going around the big black hole of online submission, and she eventually got the job after several interviews!

Do you hold the correct level of membership? Is it time to upgrade your membership?

Being recognised as a 'professional' builds your credibility in the organisation with management, your staff, users and the community. As a producer or service provider, it builds your credibility with the customer and the community. Credibility builds believability and that leads to trust – the most important ingredient whether you are selling an idea or product, want people to follow you or take notice of your advice.

Whatever your current membership status, you may be eligible to upgrade to a higher level or, if currently not a professional member, become one.

In addition to the benefits of membership enjoyed by all members, professional members also benefit from:

- Further discounts to **ALL** RIM Professionals Australasia events (10% for Associates and 15% for Chartered Member and Fellows)

- Discounts on goods and publications in the RIM Professionals Australasia Online Store

- Opportunity to attend local events supported by RIM Professionals Australasia for free

- Ability to hold positions of authority and influence on Branch Council and the Company Board, giving you the ability to shape your Branch and profession

- Ability to vote at the Company AGM, thereby having a direct influence on the Company and the RIM Industry

- Access to limited areas in the Members Only website

- Continuing Professional Development Scheme – ensures you maintain and improve your current skills and knowledge

- Recognition by employers (present and future) and peers that you are acknowledged as a professional by the peak industry association in your field and, as such, have an ongoing commitment to maintain and improve your current skills and knowledge.

To see if you are eligible to apply for a membership upgrade, please view the appropriate quick survey:

- **Associate status:** http://www.surveymonkey.com/s/DB693XB

- **Chartered Member:** http://www.surveymonkey.com/s/DHQY23J

- **Fellow:** http://www.surveymonkey.com/s/DHNWMK8

Remember that your membership is important to you and your profession. Don't sit silently and question your membership – speak up, tell your association what you want, offer to help, get involved – you will be rewarded for ensuring your profession and your professional association continue to grow and become stronger.

Kate

WORLDWIDE NEWS

PROJECT AIMS TO BUILD ONLINE HUB FOR ARCHIVAL MATERIALS

A new project called Social Networks and Archival Context Project (SNAC) aims to develop methods that will help researchers find additional materials relevant to a subject, such as the papers of people who were important.

The result for researchers will be an online "hub" that allows them to search for archival collections by the names that interest them, not just by the name of the collection.

Daniel Pitti, associate director of the Institute for Advanced Technology in the Humanities at U. of Virginia and project director of SNAC, told *The Chronicle* that the effort meets a need in scholarly research by providing broader information about social and cultural environments.

SNAC is a collaboration between researchers and developers at IATH, the University of California at Berkeley's School of Information, and the California Digital Library. The project recently finished its pilot stage with the help of a grant from the National Endowment for the Humanities. Another grant, from the Andrew W. Mellon Foundation, will support the project through another two years as it adds millions more records and begins beta testing with researchers.

The prototype, which is already up and running, allows visitors to search for the names of individuals, corporate entities, or families to find "archival context records" for them.

"So if I'm interested in a particular person," Mr Pitti says, "I can find where all the records are that would be required to understand them." For instance, a search for Robert Oppenheimer turns up a link to a collection of the physicist's papers housed at the Library of Congress, plus links to other collections in which he is referenced, a biographical timeline, and a list of occupations and subjects related to his life and work.

• For more information: http://chronicle.com/article/Building-a-Digital-Map of/131846/

IN THE NEWS: AUDIT FINDS GOVERNMENT RECORDS SYSTEMS LACKING

A nation-wide Australian news website has picked up official criticism of primitive recordkeeping processes in Federal Government agencies highlighted in the Commonweath Auditor General's latest performance audit of records management in the nation's public service.

Headlining "Government agencies wrestle with records systems", the report in the Haymarket Media daily journal *ITNews* points up the Attorney General's dismay that "duplicate records, staff dissatisfaction and procurement woes have halted attempts by Federal Government departments to overcome an increasing sea of paper and electronic records".

The journal's Canberra correspondent, John Hilvert, wrote: "An audit into records management practices at Customs, the Department of Immigration and Citizenship (DIAC), and Treasury found the departments lacked the consolidated systems or business processes to support them.

"Though each agency maintained a core records system, each had a further 130 electronic business systems to create, keep and manage records for email, shared folders and other data repositories key to departmental requirements. Many of these disparate systems failed to satisfy legal requirements surrounding record management, destruction or transfer.

"This created a risk that inaccurate or incomplete information could be accessed and used when making decisions or meeting legal and policy requirements – such as responding to freedom of information requests – according to the audit."

The Australian National Audit Office (ANAO) audit found that all three departments had experienced delays in implementing EDRM processes that both conformed with legal requirements and were easy to use.

At the Immigration Department, the audit found "potential duplicate records in relation to one of the migration processing systems identified there were 653 861 multiple records".

The ANAO report revealed that a *Strategic Review of the Treasury* in December 2011 found "records management processes involving the EDRMS were not considered user friendly, were not efficient in the capture of written documents and impeded knowledge transfer".

Customs was the only department audited that had no EDRMS system despite running 175 electronic business systems, the Audit Office found, with the result that it still required staff to print records to paper for record-keeping purposes.

The Audit-General's three recommendations read like pages from basic records management policy documents: record management functionality in electronic business systems; RM guidelines on business activity and identification of agencies' core records management needs.

• The ANAO audit, published and presented to the Federal Parliament on 24 June, is available at http://www.anao.gov.au/~/media/Uploads/Audit Reports/2011 12/201112 Audit Report No53.pdf

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HEINER AFFAIR TO BE REVIEWED

The Queensland Government has announced an inquiry into Queensland's child protection system that could lead to a further review of the Heiner affair (see *iQ* August 2010 and November 2011).

The Heiner affair centres on the 1990 shredding of documents that had allegedly detailed mismanagement at a youth detenion centre. The Queensland Government's inquiry includes a terms of reference to review the response to 'allegations of criminal conduct associated with government responses into historic child sexual abuse in youth detention centre' – an apparent reference to the Heiner affair.

RECORDS TEAM HELPS CSIRO WIN LEGAL BATTLE OVER WI-FI TECHNOLOGY

CSIRO's Telecommunications & Industrial Physics (CTIP) Records & Information Management team were instrumental in the data gathering exercise required for CSIRO to win a legal case over its 807.11 WLAN technology.

The settlement secured more than $220 million for CSIRO, which invented the technology in the 1990s.

Wi-fi technology is used in more than 3 billion electronic devices worldwide, including personal computers, video games and mobile phones.

The settlement is the second successful litigation to be conducted by the CSIRO, which patented the technology and now has licence agreements with 23 telecommunications companies.

The records team comprised Kerrie Monzo, Harmeet Deol and trainee Grant McLeod, managed by Bruce Kerr Manager, Administration.

Information required to mount the successful 'proof of concept' challenge needed to be brought together from a vast number of sources and in a variety of formats. Thousands of hard copy and electronic documents and emails, numerous reports and laboratory notebooks were gathered with the help of current and retired scientific staff over several years.

The records team had the daunting job of sourcing the information, identifying originals from copies, ensuring copies with handwritten notes appended were included and sorting everything chronologically. Then the collection was sent for digitisation and indexing by Gosford Micrographics, providing a comprehensive, contextual collection of the WLAN journey. The digitised collection was subsequently provided to legal counsel to take up the fight.

The CTIP Records & Information Management team were extremely proud to be part of this work for CSIRO and in the process, reinforce the need for good recordkeeping practices and systems.

GOVHACK 2012 WINNERS BRING ARCHIVES DATA TO LIFE

National Archives data has inspired some excellent and creative digital projects as part of the recent GovHack 2012 conference in Canberra.

GovHack is an event which draws together people from government, industry, academia and the public to mash up, reuse, and remix government data. GovHack is about finding new ways to do things and encouraging open government and open data.

Winning entries included a website that gives users their own personal bus tour exploring Canberra's history using National Archives images. Another team presented a new take on the National Archives' online PhotoSearch facility that aims to make browsing and finding National Archives images more intuitive.

The June conference brought together over 40 teams at the University of Canberra. Projects were produced using datasets from government agencies including the National Archives, Geoscience Australia, Bureau of Meteorology, Australian Bureau of Statistics and CSIRO.

'It was wonderful to see our datasets picked up by so many teams,' Director-General of the National Archives, David Fricker said. 'We hope to contribute more and see our data used in even more imaginative ways for the benefit of Australians.'
• More information: http://www.govhack.org/

ISACA ISSUES SIX PRINCIPLES FOR EFFECTIVE CLOUD COMPUTING

The growing shift to cloud computing can deliver significant value – but most enterprises have little knowledge of the perils of transferring IT decision making away from technology specialists to business unit leaders.

Eliminating oversight and governance from cloud computing decisions can create significant risk to organisations, effectively undermining any benefits of moving to the cloud and, at the same time, potentially creating serious issues for organisations.

Only through proper governance and management can cloud computing achieve its potential for organisations. To help enterprises manage the potential pressure points that begin to surface when cloud computing strategies diverge from internally provided IT services or traditional outsourced arrangements, global nonprofit IT association ISACA has issued *Guiding Principles for Cloud Computing Adoption and Use*, a complimentary guide featuring six key cloud computing principles:

1 **The Enablement Principle:** Plan for cloud computing as a strategic enabler, rather than as an outsourcing arrangement or technical platform.

2 **The Cost/Benefit Principle:** Evaluate the benefits of cloud acquisition based on a full understanding of the costs of cloud compared with the costs of other technology platform business solutions.

3 **The Enterprise Risk Principle:** Take an enterprise risk management (ERM) perspective to manage the adoption and use of cloud.

4 **The Capability Principle:** Integrate the full extent of capabilities that cloud providers offer with internal resources to provide a comprehensive technical support and delivery solution.

5 **The Accountability Principle:** Manage accountabilities by clearly defining internal and provider responsibilities.

6 **The Trust Principle:** Make trust an essential part of cloud solutions, building trust into all business processes that depend on cloud computing.

"Cloud computing presents a unique opportunity for enterprises—and is particularly a game-changer for small and medium enterprises because its availability means that technology infrastructure is not the market differentiator it has been in the past," said Ramsés Gallego, CISM, CGEIT, member of ISACA's Guidance and Practices Committee and security strategist and evangelist for Quest Software. "These principles will enable enterprises to experience the value that cloud can provide and help ensure that internal and external users can trust cloud solutions."

• ISACA's *Guiding Principles for Cloud Computing Adoption and Use* is available as a free download. Additional cloud resources, including *IT Control Objectives for Cloud Computing*, can be found at www.isaca.org/cloud.

RECORDKEEPING FAILURES IDENTIFIED BY VICTORIAN OMBUDSMAN

The Victorian Ombudsman has identified poor record-keeping practices in Corrections Victoria.

In his investigation into the death of prisoner Carl Williams the Ombudsman found that there was a lack of proper recordkeeping procedures relating to prisoner placement decisions involving Mr Williams. The Ombudsman found that the minutes of the Sentence Management Panel decision to place Mr William lacked detail. The Ombudsman found that the minutes were brief, did not record all relevant facts nor document the reasons why the decisions were taken. This failure to properly record decisions and issues taken into account in turn led to a failure of accountability and inability to justifying decision-making.

Corrections Victoria has since reviewed its practices and implemented revised procedures for recording decisions of the Panel.

SIR RUPERT HAMER AWARDS 2012

This year's Sir Rupert Hamer Records Management Awards were announced in May, showcasing a number of projects highlighting the importance of preserving records of Victoria's history for the benefit of future generations.

Named after former Victorian Premier and public records advocate, Sir Rupert Hamer, the awards have been offered by the Public Records Advisory Council (PRAC) and Public Record Office Victoria since 1998.

This year's winners included the Supreme Court of Victoria for its project 'Preserving court records: creating a records storage and disposal regime' and the Greater Shepparton City Council with 'Going Digital with Financial Information'.

• For more information: http://prov.vic.gov.au/government/sir-rupert-hamer-awards

SYMANTEC SURVEY REVEALS DIGITAL INFORMATION COSTS BUSINESSES $1.1 TRILLION

Symantec Corp. has announced that information costs businesses worldwide $1.1 trillion annually, according to its State of Information Survey.

From confidential customer information, to intellectual property, to financial transactions, organisations possess massive amounts of information that not only enable them to be competitive and efficient – but also stay in business. In fact, the survey revealed that digital information makes up 49 per cent of an organisation's total value.

"The vast amount of information that organisations produce today can help them better serve their customers and increase productivity. However, the same information can also become a major liability if it is not properly protected. Companies that effectively use their information will have a major competitive advantage over those who cannot, and in some cases it can be the difference between success and failure," said Francis deSouza, Group President, Enterprise Products and Services, Symantec Corp. "With its increasing value and rising cost, successful companies will find ways to more effectively protect their information and unleash the productivity it can bring."

Information is skyrocketing and it's expensive
Businesses of all sizes are dealing with enormous amounts of data. The total size of information stored today by all businesses is 2.2 zettabytes. Small to medium sized enterprises (SMEs) on average have 563 terabytes of data, compared with the average enterprise that has 100,000 terabytes. The survey also reveals that information is expected to grow 67 per cent over the next year for enterprises and 178 per cent for SMEs.

On average, enterprises spend $38 million annually on information, while SMEs spend $332,000. However, the yearly cost per employee for SMEs is a lot higher at $3,670, versus $3,297 for enterprise. For example, a typical 50-employee small business spends $183,500 on information management, whereas a typical large enterprise with 2,500 employees would spend $8.2 million.

The business impact of lost information
The consequences of losing business information would be disastrous. "We would have to fold our operations for at least a couple of years before we'd come back again," noted an IT manager at a large engineering firm when asked about the consequences of losing the enterprise's information. Respondents highlighted the impact of data loss to their business, including lost customers (49 per cent), damage to reputation and brand (47 per cent), decreased revenue (41 per cent), increased expenses (39 per cent) and a tumbling stock price (20 per cent).

Protection measures are falling short
With so much at stake, protecting information should be a top priority, yet businesses are still struggling. In the last year, 69 percent of businesses experienced some form of information loss for a variety of reasons, such as human error, hardware failure, security breach, or lost and stolen devices. In addition, 69 percent have had confidential information exposed outside of the company, and 31 per cent have experienced compliance failures related to information. Another challenge is the amount of duplicate information businesses are storing – an average of 42 per cent of data is duplicated. Storage utilisation is also low, at only 31 per cent within the firewall and 18 per cent outside.

All these risks and inefficiencies result in businesses spending more than necessary on storing and protecting their information.

A key issue identified by 30 per cent of businesses is information sprawl – the overwhelming growth of information that is unorganised, difficult to access and often duplicated elsewhere.

Businesses need to put the 'I' back in 'IT'
To help businesses more effectively protect their information, Symantec has the following recommendations:

- **Focus on the information, not the device or datacentre:** With BYOD and cloud, information is no longer within the four walls of a company. Protection must focus on the information, not the device or datacentre.

- **Not all information is equal:** Business must be able to separate useless data from valuable business information and protect it accordingly.

- **Be efficient:** Deduplication and archiving help companies protect more, but store less to keep pace with exponential data growth.

- **Consistency is key:** It is important to set consistent policies for information that can be enforced wherever it's located... physical, virtual and cloud environments.

- **Stay agile:** Plan for your future information needs by implementing a flexible infrastructure to support continued growth.

- For more information: http://www.symantec.com/content/en/us/about/media/pdfs/2012-state-of-information-global.en-us.pdf

TOP 25 INFORMATION MANAGERS ANNOUNCED

Information Management, an online service for the information technology and business community, recently unveiled its third annual listing of 25 Top Information Managers. The 2012 list recognises leaders who have designed or deployed information management strategies that make their organisations significantly more competitive, productive and cost-effective.

The 25 Top Information Managers listing is compiled by the editors of *Information Management* and the information technology experts who contribute to the community's website. Throughout the year, these authorities nominate chief information officers, chief technology officers, enterprise architects, and other technology leaders who are transforming their organisations though architectures and applications of traditional and new technologies. These include data management and reporting, analytics, cloud computing and mobile technologies.

"In today's demanding business environment, every person on this list is an exceptional manager with a complex role," says *Information Management* editorial director Jim Ericson. "As leaders, these individuals bring very distinct personal approaches to the various challenges they face."

This year's list of top information managers includes:

- **Adrian Gardner**, CIO and director of the information technology and communications director at NASA's Goddard Space Flight Center. With 13 data centers, 10,000 users and a supercomputer on site, Gardner manages data gathering for the entire civilian satellite program and projects including the Hubble Space Telescope.

- **Gary Lynch**, managing director of supply chain risk management at Marsh, who directs a global consulting practice using data and analytics to help clients prioritize activities based on risk, create return on risk investments and understand potential points of failure in enterprise value chains.

- **Anthony Perez**, director of business strategies for the NBA's Orlando Magic, who is working with comprehensive predictive analytic models to create a strategy for season ticketholder renewals.

- For more information: http://www.information-management.com/gallery/25-top-information-managers-2012-10022676-1.html *iQ*

Congratulations

One of RIM Professional Australia's own has recently married. Wendy Daw married Josh Morris in Brisbane on 5 May 2012, with the reception held at their favourite Persian restaurant mirroring Wendy's unique style. The day went off flawlessly as you would expect from someone who organises events regularly ;-) Wendy has been with RIM Professionals Australasia for 12 years. We wish her and her new husband all the best.
- Wendy's new email is wendy.morris@rimpa.com.au

Next issue:

What's in your strategic toolkit?

iQ is looking for articles on Policies and Procedures, Data and Analysis, Implementation and Delivery, Evaluating Impact, Communicating Effectively, Stakeholder Engagement, Identifying Core Competencies, Undertaking SWOT Analysis (strengths, weaknesses, opportunities, threats), Training and Development.

Closing 1 October 2012

Will records managers be the next technology refugees?

As the transition to digital recordkeeping continues, the challenge records managers face is how to acquire the requisite skill-set when the availability of training is limited. CONNI CHRISTENSEN investigates.

My thoughts:

The Australian government's digital transition policy intends to move all Australian Government agencies to digital recordkeeping over the next few years.

It's not hard to see why. Commonwealth agencies are currently spending $200 million plus a year storing paper records. Most of these records are born digital before being converted into paper for recordkeeping purposes. Most business processes are now totally digital – with originals maintained in a variety of electronic systems, and used as primary documentary sources for business. Wireless devices, smart phones and tablets are making it easy to work digitally almost anywhere in the 'workplace'.

Most industries are experiencing digital transition in some form or another. Digitisation brings process improvement, increased productivity, profitability. Think banking, photo processing, video stores, car repairs, health care, and mining. Jobs are affected, in many cases eliminated. For records management it will mean the end of paper files, boxes, file movements, compactuses and file registries. The digital transition policy means sooner rather than later and the extent to which individuals are affected, depends on their flexibility and adaptability. In any given situation, when change happens, those with the ability to change are the ones who will succeed.

WHAT SKILLS ARE NEEDED FOR DIGITAL TRANSITION?
National Archives of Australia identify the following skills as necessary for information and records managers working for an Australian Government agency:

- understand the business requirements of their agency, including relevant legislation and standards

- be able to analyse their agency's business or businesses

- be very familiar with modern information and records management principles and practice, including creation, capture and storage of information and records

- identify the needs of their agency to develop information and records capability

- communicate effectively with staff at various levels within their agency

- project manage the provision of resources for information and records management

- understand and influence the digital capabilities of business systems used across their agency.

Or put another way – create classification schemes and metadata sets, build information architectures, integrate recordkeeping into business process based systems, integrate business processing into recordkeeping systems, provide consultation services, deliver training etc. To maintain a role within the industry, records managers need to be taxonomists, metadata managers, business analysts, system designers, systems integrators, trainers.

WILL RECORDS MANAGERS BE THE NEXT TECHNOLOGY REFUGEES?
Unfortunately there is little intensive training in these disciplines tailored for records management, even within the degree courses. And so this type of work is usually outsourced to consultants and contractors. The result is a serious skill shortage across the industry and the emerging roles are now being filled by professionals from other disciplines (IT, library etc) many without recordkeeping knowledge.

National Archives of Australia is the first regulator to mandate a digital transition policy in Australia. The other regulators will surely follow. The challenge that many records managers face is that the time left to acquire the requisite skill set before digital transition affects their jobs is very short indeed. **iQ**

- http://www.naa.gov.au/records-management/training-events/qualifications/index.aspx

About the author CONNI CHRISTENSEN has over 20 years' experience in the Australian information management industry. She is the Founding Partner of Synercon Management Consulting and Product Manager of a.k.a.® Information Governance Software. You can find more of Conni's thoughts about B.R.I.C.K.S (*Better Records, Information and Corporate Knowledge Systems*) at www.synerconblog.co

How to rebrand records management to encourage support and collaboration

Far from the stereotype of the filing clerk, recordkeeping professionals are experts at mitigating risks to information, security and privacy.

BY **JANET KNIGHT** AND **KATE CUMMING**

Recordkeeping professionals have skills that should be valued greatly by their organisations. They know the business intimately and promote the capture of information that can support, enhance and protect the business and its employees. They manage that information to meet not only immediate needs for access but to support longer term rights and entitlements and legislative obligations. They deal with complex issues including privacy, security and access, rights management, and administrative change. And they face considerable challenges in building recordkeeping into each new wave of technological innovation adopted by their workplaces.

Yet, despite this challenging role, records management is often subject to chronic underfunding and understaffing and is rarely seen as of strategic importance to business. The stereotype of the filing clerk persists and recordkeeping professionals struggle to gain a place at the table where strategic decisions that impact on them are made.

This paper will examine the battle recordkeeping professionals face in overturning stereotypes and securing strategic influence in their organisations. It will suggest three key strategies that can be adopted by recordkeeping professionals, records and archival authorities and relevant professional associations that may assist recordkeeping professionals to collaborate better with key stakeholders, including ICT, and to gain recognition and support from senior management.

REALITIES AND PERCEPTIONS

The Digital Recordkeeping Team at State Records NSW is responsible for encouraging NSW public offices to create and manage accurate and usable digital records to support Government business and mitigate information risk.

We work with a range of recordkeeping professionals from different organisations so we have firsthand knowledge of the level of knowledge and expertise in the sector and the level of pressure they are under.

Realities

Generally recordkeeping professionals (in the NSW public sector and elsewhere) are a dedicated bunch. In most cases they passionately believe in the importance of recordkeeping to their organisations. They work hard – very hard – to do their very best to ensure it is managed well.

Story snapshot

- Despite playing a key role in business, recordkeeping professionals are often overlooked when it comes to systems design and strategic planning.

- RIM professionals need to offer assistance and support in order to secure collaboration with ICT and other key stakeholders.

- Different audiences require different approaches to communication. Change the language and message to suit the target audience.

- RIM professionals keep up with technological innovations and see them as tools that can help bring about continuous improvement.

FOCUS ON RISK

Recordkeeping professionals are responsible for an extensive range of duties. Their average duties include:

- writing policies and procedures regarding records management

- developing tools such as classification schemes, file plans, thesauri and retention and disposal authorities, and maintaining these over time

- training staff in policy, procedures and tools

- managing storage arrangements for hard copy records

- implementing and managing records and document management systems and their associated storage requirements and upgrading systems when required

- disposing of time-expired records

- facilitating access to organisation records which, in many cases, will include dealing with or assisting with FOI/GIPA enquiries, subpoenas, discovery orders, etc.

- monitoring records and compliance with organisational requirements.

>> THEY FACE CONSIDERABLE CHALLENGES IN BUILDING RECORDKEEPING INTO EACH NEW WAVE OF TECHNOLOGICAL INNOVATION ADOPTED BY THEIR WORKPLACES <<

Many of these responsibilities are complex and challenging. New digital methods of doing business are increasingly adding to their workloads.

Examples:

Social media applications often have no native recordkeeping functionality so it is up to the recordkeeping professional to determine what needs to be captured to support the business and the best way of capturing these into corporate systems.

Recordkeeping professionals are trying to negotiate and fight for contractual clauses in cloud computing arrangements to protect the records and ensure their safe return.

Many business systems are replacing traditional recordkeeping but the requirements to retain records have not changed so recordkeeping professionals are struggling to build recordkeeping into business systems, integrate them with EDRMS or define and export what is required.

Recordkeeping professionals also have to decide the fate of complex legacy systems when they often have had little involvement in their design.

Mobile technologies add additional challenges as records may not be transferred to corporate systems.

These issues are often up to records managers to resolve because they don't even make it to anyone else's radar – until it's too late.

Added to that, recordkeeping professionals often have to struggle with the complexities that come from administrative change. The large scale rearrangement of government departments and realignment of business units impacts significantly on the operation and management of information.

Perceptions

Despite this eye-popping range of complex responsibilities, recordkeeping professionals are often undervalued, poorly remunerated and under-resourced. A recent NARA records management compliance survey showed that in the US NARA Federal public service there is approximately one full-time equivalent person with assigned records management duties for every 1460 Federal employees.[1] While statistics are not at hand on the percentage of recordkeeping staff to organisations in Australia, it is undoubtedly low and the impact of the financial crisis may see it reduced even further.

The range of responsibilities recordkeeping professionals juggle mean that they need to collaborate with key stakeholders. Yet in many organisations recordkeeping professionals face difficulties in obtaining this cooperation. Senior managers and business managers often fail to recognise what recordkeeping professionals can bring to the table and leave them out of strategic decision-making. Many recordkeeping professionals also report difficulties in securing collaboration with information and communications technology (ICT)[2] staff.

The lack of such support jeopardises good digital recordkeeping outcomes and business enhancement.

Example:

Recordkeeping professionals need to be involved in systems design to ensure recordkeeping requirements are built in to meet business obligations, yet new ICT projects are frequently implemented without their knowledge, let alone their consultation or engagement.

Attitudes of senior management in NSW to recordkeeping have been measured in the past.[3] In August 2010 State Records conducted a survey of ICT staff in the NSW public sector to determine their attitudes to records and recordkeeping, to see if it was consistent with perceptions. In October 2010 we conducted a further survey to determine compliance with our *Standard on digital recordkeeping*[4]. ICT and recordkeeping professionals were required to complete the survey together. We published in *Informaa Quarterly* in February 2012 describing our findings and the survey reports are available on our website.[5] The findings of these surveys, along with our experiences inform some of the conclusions in this paper.

TOP 3 POTENTIAL STRATEGIES

Like any complex problem, the solutions are also complex. There are also a number of players and variables that can affect the outcome so it is difficult to generalise. However, in the remainder of this paper, we have isolated what we think are three key strategies that can help recordkeeping professionals, records and archival authorities and relevant professional associations to rebrand records management to bring them enhanced support and better collaboration with key stakeholders.

1 | Understand your business and focus on risk

■ *Recordkeeping professionals*

The key thing that recordkeeping professionals can bring to their organisation, to senior management and to ICT is knowledge of the business. They need to know what new information is being created, its purpose, where it is located, how it is managed, whether there are requirements for its management and what risks it poses including the potential consequences if risks were realised. This requires skills in business analysis from a records perspective[6]. The unprecedented volumes of information mean that they need to focus on areas of highest risk. They also need to pay attention to new proposals for technological innovation and try to secure involvement in key groups.

Examples:

The records team at Sydney University keep informed about just what new technological initiatives are underway at the university through formal and informal networks and offer their services to ICT and the business to build in recordkeeping solutions. When there are new key projects of high risk to the university their team will, at setup, provide advice to the business on the recordkeeping and privacy issues. They also work with relevant ICT personnel to implement the more suitable and user-friendly interface to the university's recordkeeping system.[7]

Endeavour Energy has an Enterprise Architect group which meets to consider all proposals for ICT projects within the organisation. This group uses a tool the IM staff developed (adapted from our *Checklist for assessing systems*[8] for their recordkeeping functionality) and now recordkeeping requirements are built into all technology projects at the requirements and design phases. This 'normalises' recordkeeping requirements. Project managers need to justify any departures they make from the standard requirements to this committee. While there is some cost in meeting these additional requirements, it is seen in balance with the costs associated with implementing ICT solutions that do not meet organisational needs for information.

Professional associations can make members aware of new challenges and emerging risks in the industry.

■ *Records and archival authorities*

Records and archival authorities need to understand Government business from a broader perspective. We also need to keep abreast of new directions in government for both ICT and RIM, what the latest drivers are and who the key players are. We need to be keenly aware of risks arising from changes to government policy and highlight these to senior levels of government and senior managers in departments.

Examples:

Current priorities should include ensuring key players in Government are aware of the information management and recordkeeping issues which occur with administrative change.

In addition, as shared service arrangements are implemented across NSW, we need to highlight to senior management the need to retain some staff with sufficient skills internally to maintain strategic control and supervision so that corporate responsibilities for recordkeeping are met.

Records and archival authorities also need to get involved with new developments in ICT infrastructure and whole-of-government systems at the design phase so recordkeeping is included.

Example:

State Records worked with Department of Premier and Cabinet to determine recordkeeping strategies for the HR data managed created within their new whole-of-government e-Recruitment system. Now there is clear guidance when records can be retained within the system and when long-term records need to be exported to an agency's recordkeeping system for ongoing management.[9]

■ *Professional associations*

Professional associations have an education role – to offer focused professional development to assist practitioners in managing these new challenges and make them aware of emerging risks. Workshops, lectures, case studies and discussions on listservs can all help practitioners to find out about how to align more closely to business, identify and mitigate risk, manage administrative change, etc.

2 Communicate widely

■ *Recordkeeping professionals*

Recordkeeping professionals need to hone their marketing skills and communicate key record-keeping issues and risks to senior managers, relevant business managers, system owners and ICT.

Senior management are vital to target with communication strategies. Opportunities must be seized to present short, sharp bites of information about recordkeeping problems and potential solutions. Drivers and business directions identified as part of your business analysis can be used as leverage. The focus should be on risks, and how they can be mitigated, and on how return on investment can be achieved.

Senior managers need to be made aware that the profession has changed and that any residual stereotypes they harbour about records management (think filing clerk!) are incorrect. They need to understand that recordkeeping professionals need to be aligned with key information stakeholders, including ICT, to make any real difference.

Senior managers need to have more realistic expectations of the complexity of both ICT and records projects in the 21st century. Recent reports in Australia[10] have laid the blame for failures and cost blowouts of technology-based business transformation projects firmly at the feet of ICT professionals. Likewise, recordkeeping professionals are often blamed for ●●●●●●

failed projects they partake in eg, EDRMS rollouts and digitisation projects. While some of these may be the fault of poor planning and management, often the staff become scapegoats for what one writer described as "underfunded, under-resourced projects expected to be delivered in unrealistic timeframes."[11] Senior management need to be aware that projects with chronically poor resourcing will rarely result in business enhancement.

It is also vital that recordkeeping professionals identify the right ICT professionals to help them further their objectives and target these people in communication strategies. While trying to secure collaboration, it is best to offer assistance and support rather than present ICT with further problems.

Example:

If ICT staff are worried about ensuring that systems have appropriate security, recordkeeping professionals can supply information regarding recordkeeping requirements for security and access. State Records' ICT survey results pinpoint some key concerns and shared problems.

Knowing more about ICT projects and the deadline pressures ICT staff face can also help recordkeeping professionals to isolate critical ways to assist their colleagues. Stereotypes will be toppled and then ICT staff may be more willing to reciprocate with assistance and advice. Using plain English rather than jargon can help to maximise collaboration opportunities.

Examples:

The team responsible for recordkeeping at NSW Police are gradually building up relationships with their ICT staff. For their accounts payable records, records staff introduced a digitisation project and successfully integrated SAP and TRIM so that the accounts payable process could be captured and sentenced in TRIM. This project has streamlined a time consuming business process and is likely to save the organisation money and time. Disposal can be applied so that records are not retained longer than necessary and storage space is freed up. One of the intangible benefits of this project is that it has raised the profile of the records team. Now some ICT staff seek them out for further integrations. The records team have also been actively approaching other teams introducing new systems to offer recordkeeping solutions.[12]

RM professionals need to be committed to continuing professional education to cope with new challenges in digital recordkeeping.

WE NEED TO COMMUNICATE MORE WITH SENIOR LEVELS OF GOVERNMENT TO BRING ABOUT WIDESPREAD CHANGE …

Endeavour Energy has successfully secured the support of both their senior management and ICT. As a result ICT and records staff are aligned and highly collaborative and upcoming projects are being well supported. They are now seeking funding to bring about business transformation. They are initiating a specific forum, the IM Design Authority Business Working Group, where stakeholders (including records staff) can collaborate. In this forum information management staff can advise on governance frameworks for information and they can also highlight and seek resolution for information management issues.

■ *Records and archival authorities*

Records and archival authorities have traditionally spent a significant proportion of their time educating recordkeeping professionals to embrace the new challenges that face them: guiding, training and mentoring. While this is important work, our attention can no longer be solely focused at this level. We need to communicate more with senior levels of government to bring about widespread change and the kind of support that recordkeeping professionals need so they can collaborate with key stakeholders in digital recordkeeping effectively.

Examples:

At State Records, we communicate with chief executives once a year through a newsletter, bringing significant issues to their attention. This has had some success in capturing their attention in the past, though often it can result in more work for the recordkeeping professionals!

We are also trying to collaborate more frequently with the Information and Privacy Commission, the Audit Office, the Ombudsman's Office and the team at the Department of Finance and Services who direct ICT policy and strategy.

We are not always reaching the right people and even when do, we may not always succeed, but we are learning along the way and more recently, senior staff in key organisations have been approaching us!

Records and archival authorities also need to embrace strategies to communicate with the ICT profession in better ways.

Example:

The Digital Recordkeeping Team at State Records is engaging with EDRMS and product vendors. We have been advising HP and Objective Corporation (the two major players in EDRMS in NSW) and other vendors. We are happy to provide advice as it can result in better software outcomes that help our clients and bring about better recordkeeping.

We have also been targeting ICT professionals in agencies, with web information to assist them, and forums and workshops on shared issues.

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2 The term Information and communications technology (ICT) professional is being used in this paper to describe people involved in engineering and/or maintaining systems to manage information assets. It is in common use as a term in NSW government. For example, there is a NSW Government *ICT Strategy*. It is important to note, however, that ICT professionals cannot easily be grouped as they can hold varied and unique roles. A business analyst is entirely different to an IT support desk officer and a recordkeeping professional's interaction with each of these roles is likely to be different.

3 State Records NSW commissioned the Taverner Research Company in October 2002 to conduct a survey of NSW Government Chief Executives' attitudes to records and records management and report on the findings. The report was called *View from the top: Qualitative research to investigate chief executives attitudes, opinions and behaviour. Recordkeeping* (not available online).

4 State Records NSW, *Standard on digital recordkeeping*, 2008, available at: http://www.records.nsw.gov.au/recordkeeping/government-recordkeeping-manual/rules/standards/Digital-recordkeeping

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6 The *Manual for Designing and Implementing Recordkeeping Systems* (the DIRKS Manual) provides a workable methodology for business analysis for recordkeeping. It can help you to know what records your organisation creates, which are the critical, vital and high risk records you need to focus your attention on, and what the long term requirements are for records.

7 On State Records *Future Proof* site, there is a podcast of a presentation by May Robertson at the NSW Records Managers' Forum which explains how she aligned with ICT and business managers. See *Delivering recordkeeping projects in collaboration with ICT and business professionals*, 8 Nov 2010, http://futureproof.records.nsw.gov.au/the-future-proof-podcast-series/#episode13

8 State Records NSW, *Checklist for assessing business systems*, 2010, available at: http://www.records.nsw.gov.au/recordkeeping/government-recordkeeping-manual/guidance/recordkeeping-in-brief/recordkeeping-in-brief-42

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10 This includes the Victorian Ombudman's report, 2011, available at: http://www.ombudsman.vic.gov.au/resources/documents/Investigation_into_ICT_enabled_projects_Nov_2011.pdf

11 Dr Steven Hodgkinson, 'Victorian Ombudsman fires an ICT distress fare', *Government Technology review*, Feb/Mar 2012, issue 11, p.36.

12 For more information about the accounts payable project see Case study: *NSW Police Force business process digitisation program for accounts payable*, 2012, available at: http://www.records.nsw.gov.au/recordkeeping/government-recordkeeping-manual/guidance/guidelines/managing-digitisation-programs-and-projects/digitisation-case-studies/case-study-nsw-police-force-business-process-digitisation-program-for-accounts-payable

13 Anthony Wong, the then President of the Australian Computer Society, suggested in his presentation *Are records and information managers becoming ICT professionals?* RIM Professionals Australasia InForum Convention, 11-14 Sep 2011, Darwin, that the Skills Framework for the Information Age might provide a common reference model. Paper available on the members only part of the RIM Professionals Australasia website at www.rimpa.com.au

We also need to adapt our language and our message to specifically target different audiences. Traditionally we have talked about best practice and compliance. However, in times of financial hardship these concepts do not cut it – so we need to talk about the risks and consequences if recordkeeping requirements are ignored.

■ *Professional associations*
Professional associations need to consider carefully how to encourage senior management support for the profession through education and communication.

Examples:
Initiatives like Information Awareness Month may provide an opportunity for RIM Professionals Australasia to target senior management.

RIM Professionals Australasia could develop and distribute high level promotional flyers to CEOs advocating the need for ICT and RIM to align and the benefits of doing so.

Professional associations can also change perceptions of recordkeeping through better communication. There are many missed opportunities to raise the profile of the profession and show its value and relevance to ICT, senior management and the community.

Example:
High-profile recordkeeping and business systems failures reported in the media present an opportunity for the profession to distribute media releases promoting the value of RIM professionals working in conjunction with ICT.

We realise that the professional associations are primarily run by busy volunteers, but more visibility of the issues and risks would help the entire profession and promote collaboration.

3 Reinvent tools, skills, approaches and practices for the digital environment

Our final recommendation is to keep reinventing tools, skills, approaches and practices for the digital environment.

■ *Recordkeeping professionals*
Even some of the highly skilled recordkeeping professionals struggle with new challenges in digital recordkeeping. All need to be committed to continuing professional education and

development. They need to seek out opportunities to learn about technical issues that are relevant to their work.

Example:
Recordkeeping professionals should be able to:

- define digital records required in business systems and assess to see if systems are capable of managing these
- understand how integrations between business systems and EDRMS are achieved
- understand the process of systems migration and know what metadata and records need to be brought across.

Knowledge of these areas will certainly help them to communicate with ICT staff and offer advice of benefit to them.

Recordkeeping professionals need to ensure the tools, approaches and practices they adopt are valid for their business environment and will actually support and enhance the business rather than be an additional burden on staff. They should structure systems so that recordkeeping tools are invisible to the user wherever possible. While such strategies may cause more work for the recordkeeping professional, inevitably they will reduce the effort that has to be put into change management and increase the success of initiatives. Approaches should be monitored regularly and adjusted when needed. Recordkeeping professionals should investigate new technological developments and consider how to incorporate these to bring about continuous improvement.

■ *Records and archival authorities*
Likewise, records and archival authorities need to reinvent their tools, skills, approaches and practices. All departments, records and archival authorities are struggling to work efficiently in the tight financial climate. However, we need to make time to reconsider our approaches. It may mean we have to temporarily stop what we have always done to focus attention on areas where more innovation is needed. In particular we need to reconsider the design of recordkeeping tools for digital systems.

Example:
Retention and disposal authorities can be difficult to apply to business systems and EDRMS environments. This may require a rethink of the approach to digital disposal. Members of the Australasian Digital Recordkeeping Initiative (ADRI) are considering how to innovate in this complex area.

■ *Professional associations*
Professional associations need to keep reinventing the way they are supporting their members.

Examples:
For existing members they could fill gaps in professional knowledge and offer more opportunities for professional collaboration with ICT staff.

Professional associations can also influence professional education in information, records and archives management so that it is more cohesive with what the market needs and ensures the right people with the right skills are attracted to the profession.

Examples:
They can speak to schools and universities on career days to topple stereotypes about the recordkeeping profession.
They can encourage the alignment of ICT competencies with RIM competencies[13].
Perhaps more shared subjects between ICT and RIM can be promoted in universities and TAFE colleges, which can break down stereotypes and barriers, reduce the language difficulties between the professions and open the doors to better communication and understanding.

CONCLUSION
None of the three recommendations made in this paper are easy to achieve. They take time and energy and require us all to rethink our approaches, realign our alliances and reinvent ourselves. However, we hope that our research and experiences will provide some insights into how we move forward, strengthen our alliances with key stakeholders, including the ICT community, and make senior management and others realise how valuable our industry and our practitioners are. **iQ**

About the authors

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Janet has over 20 years' experience as an archivist and records manager. Much of her career has been with State Records NSW where she has worked in all operational areas. She has also worked for the National Archives of Australia and the (then) Australian Broadcasting Authority. She has been involved with RIM Professionals Australasia at a State level, including serving on the organising committee for the 2000 Conference in Sydney and co-editing *Informaa Quarterly*. She is currently the Secretary of the NSW Branch.

KATE CUMMING is a Project Officer in the Government Recordkeeping program at State Records NSW. Her main areas of responsibility concern policy and practice on a range of digital recordkeeping issues. Kate holds a PhD in Information Management and Systems from Monash University.
Kate has a longstanding involvement with the Standards Australia records management committee and has represented Australia at numerous meetings of the International Standards Organization. She is also a co-founder of the Recordkeeping Roundtable, a Sydney-based discussion group fostering discussion and debate on issues relevant to contemporary recordkeeping practice.

Building IM success:
with your users by your side

During her time at Objective Catherine Doran has been involved in a number of projects with customers who are either implementing a new system to manage their information or upgrading an existing one. A range of techniques can be used to ensure successful implementations and ongoing buy-in from all levels of the organisation. Here, she proposes some ways to approach projects that can benefit an organisation, while also keeping the needs of end users in mind.

BY **CATHERINE DORAN**

An important question to think about when starting a project is: why are we doing this? In many cases, reasons like compliance with legislation are no longer enough. Compelling problems are often those which affect the day-to-day work of a large number of staff across the organisation.

In a large project there might be a number of issues that you are attempting to solve or benefits that you are wanting to achieve. One of the first project tasks should be to identify the problems before you begin crafting a solution. It is important not to underestimate the effort required in this stage and it may be a project in itself. Good problem definition provides a clear direction for system and user testing later in the project. Strong user adoption is also more likely if the solution meets identified needs.

The following steps can be used for problem identification:

1 **Narrow it down.** You can't fix everything all at once, so focus on a recurring, widespread issue or maybe something that is easy to fix but would make a big difference for the end users. Ideally you would want to be able to measure the issues this problem is causing – for example, how much time is being wasted because you can't find things on the network drives. If possible, identify a specific business process where this problem is visible and creates unwanted risks or issues.

2 **Watch it happen.** Find some people who are experiencing the problem and observe them in their work. Context is vital in being able to describe a problem and also start planning for a solution. If you know what people are searching for then you can more clearly describe the path to a solution.

3 **Identify the cause.** Finding out what is causing the problem will give you a place to focus your attentions. There is no point upgrading the user interface if the issue is actually that your data is missing key fields. Projects involving IT software are often costly and it is important that you are focusing on the right elements.

4 **Create some baseline measurements.** Let's say the problem is that data for regular reporting is hard to find. How often do people search for this data? How long does it take them to find it? How highly do they rate their ability to find the correct data? Creating good baseline measurements means that you can refer back to them later on to demonstrate the

Story snapshot

- Focus on recurring or widespread issues that have measurable characteristics.
- Set realistic goals, starting small and building up success.
- Solve problems within their context for a viable solution.

≫ MAKE SURE YOU HAVE SOMETHING THAT IS THE BEST THING SINCE SLICED BREAD IN YOUR BAG OF TRICKS ≪

improvements you have made. While it can be difficult to demonstrate a direct link between saving time and saving money, efficiency is a good measure to demonstrate a high-performing team or process.

5 **Find value in solving the problem.** The problems which are of most pressing concern are those which present high risk to the organisation, or which are costing more money than they ought. If your problem analysis can point to a particular business process which magnifies organisational risk or if you are spending more money on something than you need, then these are more likely to be problems that management wants to solve.

These steps should provide you with enough information to start working towards solving the problem. Identifying and understanding specific problems provides you with the means to explicitly state the benefit that will be provided by solving the problem – and if you can't articulate the benefit to the end users, then maybe it's not that important after all.

BE REALISTIC

The steps outlined in this article make a number of assumptions. They assume you are adequately resourced to be involved, that you have access to your end users and that your organisational culture provides mechanisms for back-and-forth feedback. These statements may not always be true in your organisation.

It is important to be realistic about what is possible and not set yourself up for disappointment. If possible, build this realism into project goals. If you have an organisation with 1,000 staff, and historically the organisation operates in distinct information silos, it is unlikely that a project to implement an EDRMS will magically dissolve these silos and have everyone working together happily straight away.

Start small and build up your success. Ideally find a group that is open to working collaboratively (if that is your aim) and work with them to find the best working options. Then apply those to the next group and so on.

UNDERSTAND THE CONTEXT

Problems don't exist in a vacuum. Earlier we looked at the need to watch people experience the problems you are trying to solve. Once you have identified a specific problem you need to understand its context. Solving problems within their context makes for a more viable solution and one which is less likely to be vulnerable to a change in process. Being able to clearly articulate how a given process works means that you can more easily focus on the problem areas.

You don't need to be a business analyst to understand business process. As with problem definition, the important factor is to talk to the people who best understand the process. A common question when having this conversation is "what happens next?" So, you can build a picture of the 'end to end' process rather than just isolated parts. If possible, find people who can articulate the purpose – what are they actually trying to achieve?

Suggested steps for understanding business process include:

1 **Find the people who work within the process.** Ask them to show you 'their bits' – remembering that a process will often involve a number of people who might have different ideas about what happens and in what order.

2 **Read any existing documentation for the process and compare it with what the people described to you.** Documentation sometimes differs from 'reality' and it is important to determine the size of any gap.

3 **Document the process in your own words – or pictures.** Diagrams can be useful for understanding how a process works. Some organisations will already have process diagrams available, but make sure that they are accurate as processes are often subject to changes over time.

Once you understand the business process then you can analyse the impact of solving the business problems you have identified. Will it change the process? Will solving the problems contribute measurably to the stated outcome of the process? If you discover that a process needs significant change to provide the stated benefits then make sure you think about what change management options are available to ease the transition.

Again, measurements are invaluable. There may be metrics available on how often a process is carried out, how long it takes to run, how many people are involved, etc. These all impact on the cost to the organisation, and it may be that solving the problem you have identified will reduce this cost.

Paula Burke, Principal, Records Systems & Office Support at Environment Southland, outlines the collaborative approach they took to set up a new file plan in Objective:

"Divisional meetings were held to nut out the file plan – we looked at what existed and what we really needed going into the future. We looked hard and long at existing processes within divisions and how these could be improved working with the staff in each division – we definitely took a collaborative approach in this regard. A base structure was built and then taken to the super users for them to compile feedback from their divisional users."

FIND A SOLUTION

Once you understand the business problem and its context, and have measured the current state, it's time to move on to solving the problem. There are plenty of project methodologies around with ways to run the project, but again it is vital to continue involving and communicating with your business users. At this stage it is useful to have a joint understanding between management and staff about the scope of the problem and how the solution is going to be approached. A collaborative approach will get a better outcome, particularly as buy-in from senior management can lead to greater acceptance across the organisation.

Many projects related to introducing new software use phased rollouts. This may include a pilot stage where a small group is used to make sure the new software meets business requirements, and then it can be rolled out in groups across the organisation. In this case, communication becomes even more important to keep the later groups aware of current progress.

Bruce Balfour, Manager Information Services at Tauranga City Council, suggests an approach for introducing solutions to users:

"Identify the pain points and have a strategy to solve them before showing the end users anything about the application. Give demonstrations to similar groups of people ie, same team or activity. That way, when the inevitable questions are posed, you are prepared and either have a concrete example of a solution or a good description that has been thought through."

Particularly in large organisations it will not be possible to personally talk with everyone who has a stake in fixing the identified problems. However, there are a number of tactics for keeping up the communication. Common examples include:

1 **Directly involve the end users in your project.** Your ability to do this will be influenced by factors such as staff availability, time requirements, budget and the relative importance of your project. The best way to do this may be through a secondment for the length of the project, but this will depend on the organisation.

2 **Have a reference group who provide feedback on progress.** This has a number of benefits. Not only are you keeping people informed about what is happening, but you can also feed through information at relevant stages and get feedback about whether you are headed in the right direction. Ideally your reference group will be able to communicate back to their teams.

3 **Tell everyone what you're doing.** Different organisations have different ways of communicating, but common methods include a page on the intranet or wiki, posters around the building(s), presentations at staff meetings and newsletters which can be emailed to staff. Communications staff are usually happy to be asked for their advice on which methods work best in your organisation. And of course, you can ask the users which methods they prefer.

Bruce also suggests ways to engage people and keep them interested:

"Make sure you have something that is the best thing since sliced bread in your bag of tricks. Knowing what people need will allow you to have a few examples of the 'good stuff' to pull out at the appropriate time. This might be strong security for HR, image handling for Communications or whizzy integration to other systems. Don't fire all your guns at once though, build up to the highlights."

WHEN DOES IT END?

Projects usually have a prescribed start and end date. The project sets out to achieve a stated aim and at the end of the project some version of that aim will have (or have not) been achieved. This doesn't mean that your engagement with the end user stops!

If you have some level of responsibility for managing an information system, it is almost certain that there are people in your organisation who need to use it on a regular basis. It might

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be purely as a consumer of information, or your end users may be using the system to add, find and edit information.

Particularly if the latter is the case, then it is crucial that you stay in touch with the users and are constantly seeking feedback. Ways to continue talking include:

1 **Keep the reference group going.** They might have feedback about issues left over from the project, could come up with new ideas for using the systems you have in place and are generally a good way to hear what the users are really thinking – sometimes they won't tell you directly.

2 **Communicate with the users and keep yourself (and your systems) visible.** The communication methods mentioned above are all still valid once the project finishes, but the emphasis might change. Reminders, tips and requests for feedback are all great, and you are more likely to get a response if people already know who you are and what you (and your systems) do.

3 **Tell people about your success.** Reward staff who engage in a positive manner and encourage creativity and innovation. Regular reporting on system usage to both management and end users can provide a useful reminder of the system's purpose and encourage staff to use it.

4 **Be responsive.** If someone provides feedback then let them know you've got it and what you are going to do about it. If there is a system outage or other problem, use the existing channels to let people know. This might be through a service desk notification or you might let people know in another way.

Paula also puts value on continuous improvement and engagement with end users:

"After initially going live with Objective, the users now understand that the system will be ever evolving and ever improving. I really don't see how you could successfully implement a system like this without your end users – at the end of the day, they are the people that use the system, they should have input from the beginning so they feel like they own it too."

The days of information management being hidden away amongst the filing cabinets are long gone. An important part of success is making yourself someone who is known and who knows what's happening. Find the problems you can help solve, talk to the people who you can help and continue the conversation. **iQ**

A powerful nexus

Recordkeeping is fast becoming a shared responsibility for the Records Management, Business and IT divisions in agencies, bringing with it the challenges of managing information from various sources. Critically, this nexus of functions plays a powerful role in valuing expertise and collaboration in the preservation of our state and archival records.

BY **SUPARNA CHATTERJEE**

As we move towards a new era of information technology where we query and add to multiple data sources, we have become both creators and consumers of information. Our attitude towards recordkeeping oscillates between the extremes of compulsive hoarding and a minimalist approach to managing digital information. There is increasing pressure on live recordkeeping databases to manage business knowledge that has been categorised as archival. The desire to hoard all information is based upon a vague belief that some of it will be required in the future. However, the future of recordkeeping lies in a balanced approach which involves and supports all stakeholders in managing different forms of records effectively.

RECORDKEEPING IS THE SHARED RESPONSIBILITY OF ALL

When records are created, considering how that knowledge will be managed as a corporate record is often not given a high priority. Parallel Information bases are gradually building in agencies. The current trend suggests we use and hold large quantities of information as our knowledge source and use this in the workplace, yet we are reluctant to manage the same as records. Some of this reluctance could be attributed to a concept that knowledge is associated with electronic formats whereas records are a physical manifestation. Many still hold the belief that until a matter is completed it doesn't transcend to the form of record, and when it does become a record then it gets captured in print to be sent to off-site storage, never to be seen again.

Unlike in the past when business knowledge could undergo a gradual transformation in format prior to being declared an official record, the current context of recordkeeping encourages a wholly electronic life cycle when it comes to knowledge management. This makes it increasingly difficult for businesses to decide when and how to capture information as part of the agency's corporate records.

With the trend changing towards records being created in electronic form and managed electronically, it has also become a shared responsibility between Records Management, Business and Information Technology (IT). Increasingly, records for all practical purposes exist in various formats and media, and recordkeeping is the shared responsibility of all within an agency.

When agencies can determine which records are of ongoing archival value, they avoid filling their archives with superfluous items and unnecessary paperwork. This issue multiplies exponentially in the electronic world! Storing archival data in the live database may provide an interim solution but creates a need to store archival records outside the live database.

Story snapshot

- Best practice recordkeeping is critical to an agency's decision-making capability.

- Users value coordinated management of information from creation through to preservation.

- Recordkeeping is a shared responsibility for an agency.

Over the years, the practice of Information Technology (IT) has required storage of business information outside the live environment, usually as back-up tapes capturing periodical data on a daily, weekly and monthly basis to respond to disasters. The manner in which these back-up tapes are maintained helps the agency to respond to a disaster and continue with its business. These information tapes are stored in date order, with little or no reference metadata to give context to the data captured. Obtaining IT support for archival information management has become an increasingly challenging task.

The above issue extends to the professional worlds of RIM and IT in general. Agencies respond to this challenge by exploring key trends and associated issues regarding the preservation of digital data: what needs to be kept, managed, accessed and made available with appropriate security? An information session was held on 21 May 2012 at the Atrium Theatrette. This agency had an ideal opportunity to integrate the theme for Information Awareness Month, 'Connecting People and Information' with the challenges facing Government Departments which manage electronic information in a compliant manner.

Speakers for the day included the WA Information Commissioner, Sven Bluemmel, who highlighted 'The growing importance of information in government – there's no going back to the good old days'. He talked about the benefits of electronic information, the business enhancements that it has led to, along with the rising awareness of 'information openness' and the increased responsibility of a department to ensure that the captured information is stored and managed adequately so that it can be easily retrieved when needed.

Invited speakers from the State Records Office discussed 'Future Challenges: archives on demand'. Their presentation outlined the scale and complexity of the industry's challenge in preserving data – both in paper and electronic form – over an extended period of time for compliance and historical purposes. A relationship where seemingly separate fields of Business, IT and Records intersect was suggested. This interface incorporates the business requirements for data longevity and long-term accessibility, choosing technology that suits the business requirements and to lock up data with the perfect

retrieval keys. The cautionary message was: "As technology moves forward, do not forget to migrate your storage media into readable formats".

The session was facilitated by the Director Shared Information Services from DotAG, along with an interactive opening and closing address from the Executive Director Corporate Services of DotAG. The session highlighted the importance of managing business records, irrespective of format, and that it is the responsibility of each information user to manage corporate information in a compliant manner. A spirited and thought-provoking Q&A-style panel discussion followed, with the speakers responding to questions from the audience. It was acknowledged that users want a coordinated environment that manages information from creation to preservation, accommodating various sources with multiple tools and data storage. They want to access it effectively when making a decision.

An important message on the day was 'Knowledge Today Records Tomorrow' to raise staff awareness for managing business information within the best practices of recordkeeping. The significance of this theme reflects a belief that the effective management of records is a critical factor in the decision-making of an agency in the long term.

The information session emphasised that a compliant environment grows from fostering expertise in individual employees to manage business information with a records management perspective. This new perspective, which emphasises collaboration rather than delineation, represents a new paradigm of participation between Business, IT and Records with the common aim of preserving records with 'state value'. While it is true that the information session was not a silver bullet, it signified the beginning of an understanding of the 'intersecting' relationship of Business, IT and Records. **iQ**

About the author

SUPARNA CHATTERJEE ARIM is Manager Records & Compliance Branch at the WA Department of the Attorney-General. She has been working in Information Management for over 17 years and with six government departments. Roles have varied between coordinator to branch manager along with extensive project experience in electronic document and records management (EDRMS).

Su has a BA (Hons) in English Literature from India, and she has completed a Postgraduate Diploma in English from Curtin University; a Diploma of Business (Recordkeeping) from Central TAFE; and a Graduate Diploma in Public Sector Management (PSM) from Curtin University.

Managing 'tweets' as records

Should tweets be managed as corporate records? Will the risk of not saving tweets because of the challenge this presents for organisations outweigh the benefits of being in control of your recorded information? Having recently trialled a way of capturing tweets as records within her organisation's EDRMS, Katharine Stevenson shares her thoughts and experience on the 'Twitterverse' and RIM

BY **KATHARINE STEVENSON**

Some of you may have recently heard James Lappin's excellent Podcast with Christian Walker where they discussed whether records management is compatible with Enterprise 2.0.[1] Part of the conversation discussed the micro-blogging site Twitter and whether we should be managing tweets as corporate records, and if so, how. While they were both in agreement that some tweets should be regarded as corporate records, the big challenges were how to capture them in an organisation's records management system, without capturing the 'noise' that sometimes goes along with using Twitter corporately.

WHAT ARE TWEETS?

For those of you yet to venture out into the 'Twitterverse', Twitter is commonly described as a 'micro-blogging' site. It is essentially a website where you can write what you like, within a limited number of characters…140 to be exact. These short messages are called 'tweets'. Some people choose to type these tweets using the main Twitter.com website, others like myself, prefer to tweet 'on the go' with an iPhone using an 'app'. Using the website or an 'app' you can send or read these tweets; you can send messages directly to other people on Twitter either as an '@' reply, or as a Direct Message (DM); you can 'follow' people or have 'followers'. You might also set up a '#tag' which people can search for.

It is a great source of fun, but also a great source for information. Most of the people/organisations I 'follow' are in the Information and Records Management field so it is a good way of keeping up to date with my profession. There are many organisations on Twitter, including my own, who use it as a tool to help them carry out their work, so this raises the question of whether these organisations view their tweets as 'records'.

ARE TWEETS CORPORATE RECORDS?

The Lord Chancellor's code of practice on the management of records states that all forms of corporate records should be captured into a records management system, regardless of format (section 9). But how many organisations are complying with this recommendation?

I have twice 'tweeted' asking if any organisations are capturing their tweets as their corporate records. I had very little response, even with my question 're-tweeted' by others sharing it with their 'followers'. Most of the responses were along the lines of: 'No, but I'd be interested in your results'. This response suggested that we are still in limbo over whether we need to capture tweets as records.

The question of whether tweets should be treated as corporate records is an important one. While I could not find much being discussed in the UK (until James Lappin's recent Podcast), there is plenty of discussion and guidance elsewhere. In October 2010, NARA (National Archives and Records Administration) put out a bulletin providing guidance on managing records in Web 2.0/Social Media Platforms. The bulletin answers the question of whether federal records are created when agencies use social media platforms, and the answer is pretty clear:

'The principles for analyzing, scheduling, and managing records are based on content and are independent of the medium; where and how an agency creates, uses, or stores information does not affect how agencies identify Federal records'[2]

While this statement is clearly aimed at America, its message should be seen as suitable for any country, any organisation, public or private. As records managers we are constantly reminding people that records are records regardless of format, but it appears to be very easy to forget this when it comes to records created and held in social media platforms such as Twitter.

Queensland State Archives have also issued guidance on 'Capturing Short Messages' specifically focusing on Twitter.[3] This is an excellent piece of guidance with an explanation of a micro-blog, and the recognition that 'a record is information in any format, either created or received, required as evidence of the business activities of a public authority'. It then gives some helpful examples of the different types of short messages that should be captured as records.

There was also an interesting paper from America which considered 'Records Management issues and Corporate Social Media and Cloud Computing'.[4] Written on the back of the NARA bulletin, the author of this paper, Robert F. Smallwood lists the questions which should be used to determine whether information created in a social media platform should be captured as a record:

- Is the information unique and not available anywhere else?
- Does it contain evidence of an agency's policies, business, mission, etc?
- Is this tool being used in relation to the agency's work?
- Is use of the tool authorized by the agency?
- Is there a business need for the information?

Although the wording in the questions is written for American federal records, the same questions should be applied here too, to any business or organisation, whenever you are trying to determine if a tweet, a status update (Facebook) or a Wiki, forms part of the corporate record.

Christian Walker, during the Podcast with James Lappin, also argued that if a tweet demonstrates a business decision or leads to a business outcome then those things 'absolutely have to be captured' as a corporate record. He gave the analogy of telephone calls, which are now often recorded as records for the company to use, and asked whether tweets should not be treated in the same way? James Lappin also suggested another example of a tweet that could be considered as a record: advice given by an airline to a passenger who has tweeted them. This is surely evidence that an employee has carried out their job, and the specific advice that they have given, and should therefore save the tweet as a record of a business activity.

Story snapshot

- If a tweet demonstrates a business decision or leads to a business outcome then those things 'absolutely have to be captured' as a corporate record.

- How can an organisation's records management system capture tweets that are considered to be corporate records, without capturing the 'noise'?

- Is there really a need to save tweets into our own records management systems when Twitter saves them for us?

DO WE NEED TO SAVE TWEETS IN OUR OWN RECORDS MANAGEMENT SYSTEMS?

So now that we have established that tweets *should* be treated as corporate records, is there really a need to save our tweets into our own records management systems? Twitter does save all your tweets on their website (my first one @k4tys was 9 March 2009 and I can still access it). However they are saved in chronological order meaning you need to keep scrolling and waiting for the tweets to load. This is not, in my opinion, a very good example of a search and retrieval system. While there is a search tool on Twitter, there are just so many tweets created throughout the world that the results will create 'information overload' (and again listed in chronological order so you still have to look down the list).

Another consideration is what guarantee do we have that Twitter will always preserve our tweets? What happens if Twitter shuts down? Yes, the US Congress Library has announced that it will be saving every tweet ever sent, but as James Lappin rightly pointed out during his Podcast, we are no closer to being able to access those tweets ourselves, as the Library has not revealed how they are storing them.

Another argument why tweets should be saved into record keeping systems is that corporate records should be made accessible to those who require them, i.e. your staff. If your organisation restricts access to social media sites such as Twitter, then staff cannot access those tweets at work (other than those in your Communication department who are granted that special privilege of course!).

One final reason for finding a method of saving tweets into your own corporate records management systems is compliance with the FOI Act (where applicable). In September 2011 the Information Commissioner made it clear that if government departments are using Twitter and Facebook to engage with citizens they must also apply the same principle when citizens use those mediums to make FOI requests.[6] Taking this advice, organisations must therefore find a way of recording FOI requests within their own systems – as they would an email or letter.

HOW CAN TWEETS BE SAVED AS CORPORATE RECORDS?

So, convinced that I was going down the right path, determined that tweets should be treated as corporate records, I began to think about whether we need to capture them in our own EDRMS, or whether we could rely on the 'Twitter corporation' to save our tweets, in a way that would allow us to look back and see what we had tweeted.

Returning to the example of an FOI request being received via Twitter, one way of saving the information request could be to simply retype the tweet as a 'file note' – perhaps as we would a telephone call requesting information under the *Environmental Information Regulations*. There is absolutely nothing wrong with that, although we would have to accept that it does not capture the required metadata which helps to make a record authentic. But is it not a little old fashioned to be working in this way still? Would it not be far more 21st Century and authentic to simply 'download' the tweet into our records management systems?

Finding a tool that will allow us to download our tweets from Twitter, whilst capturing the required metadata (ie, the exact time and date sent, the account name, the words) was not that difficult. There is plenty of information out there in the form of blogs and articles – mostly based in America and Australia. One particular webpage was this one:

– http://m.readwriteweb.com/archives/10_ways_to_archive_ your_tweets.php

Out of the 10 suggestions, which included the use of 'Wordpress', 'Twapper Keeper' and 'RSS feeds' I selected 'TwInbox' as the most appropriate for my organisation because it integrated with Microsoft Outlook. TwInbox automatically downloads all tweets sent and received, making it simple and easy to use. This sounded ideal for my organisation's EDRMS, which also happens to be integrated with Outlook and allows us to simply 'drag and drop' emails into the fileplan. The downloaded tweets are not in the form of emails but as 'conversation' outlook documents. Having got the green light from my IT department to download the software onto my computer (and grant me special access to Twitter of course!) TwInbox was easy to set up, creating a set of subfolders in my personal email account. The tweets that had been sent since the account first opened began to trickle in and so I tentatively dragged and dropped one into the Twitter folder I'd set up in our file plan under our 'communications' class. It worked!

The subject line of the downloaded tweet uses the 140-character tweet you sent or received. As this is already featured in the content of the tweet (and therefore searchable using our EDRMS search feature) I decided that it was appropriate to develop a naming convention for tweets so that we can easily search or sort them according to date or subject matter. This provides a much better search and retrieval facility than Twitter does. I then even 'declared' it in our EDRMS so that no one can tamper with the record. Perfect!

MANAGING THE 'NOISE'

As Christian Walker rightly pointed out, we do not want to capture every tweet, as not all of the tweets will form the corporate record. To ensure we were only capturing the tweets we needed, I discussed the purpose of my organisation's tweets with our Communications manager. She said the main purpose is to promote the organisation's work and that it was not intended to be a means of corresponding with people about their complaints (my organisation's main purpose is to provide a complaints service).

This discussion took place shortly after the Information Commissioner hinted that tweets can be used to submit FOI requests, so we discussed how that could work in practice. We agreed that the tweet would be passed onto our FOI team and we would respond to the requester telling them this. These FOI requests will need to be recorded in our Case Management System where we hold our FOI records (something else to be tested!).

I also discussed whether Tweets which reference our Twitter name (but were not directly a question to us) should be captured as records. We agreed that they should not because someone else referencing us is not evidence of a business activity.

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So with it agreed that the main purpose of our Tweets was promotion of our work it was felt that these tweets fall under the category of 'External Communications' in our fileplan. Records created under this classification have a retention schedule of three years.

IS IT WORTH IT?

Some might argue 'what is the point', especially if the tweets are going to be deleted after three years? Well, as most records end up being deleted at some point, to me it does not sound unreasonable to save tweets as records too. We need records to help us with our work, to prove what we have done, to record key decisions and actions. If we want to know what we wrote in a tweet two years ago, we can simply go to our EDRMS to find out. And with automated retention and disposal now applied to our EDRMS the hassle of remembering to delete those tweets in three year's time is removed.

But with most things in records management, understanding the 'risk' element of not saving tweets should also be considered when deciding whether to save tweets. Organisations may decide that the risk of not saving tweets (staff not able to access tweets, staff time wasted searching for tweets, FOI requests lost) outweighs the benefits of being in control of your recorded information (better search and retrieval, staff can access tweets, FOI requests easily recorded). Each organisation will be different, and will view the importance of their records differently. But my argument is that if it is easy and cost effective (TwInbox is free, and takes a member of staff seconds to 'drag and drop' the tweet into the file plan) then why not try to do something, in my opinion, correctly? **iQ**

• **Post script:** On submission of this paper, the Public Record Office Victoria has also just released a paper on the Recordkeeping Implications of Social Media. It can be found here: http://prov.vic.gov.au/wp-content/uploads/2012/03/PROV-Social-Media-Policy-Issues-Paper-2012.pdf

• **Note:** This paper first appeared in the *Bulletin* (the journal of the Information and Records Management Society, UK).

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Digital asset management and virtual resource libraries

With the drive towards digitisation comes the need for a virtual resource library – and new 'hybrid librarians'.

The term 'digitisation' is commonplace today and organisations which aren't already creating electronic resources from their physical assets are certainly considering doing so. For some this is a way of generating income from their assets; in its simplest form this could include selling posters or prints of rare illustrations. Other organisations are turning to digitisation to create efficiencies, so that, in future, they won't have warehouses full of archived documents which are difficult to retrieve. Instead, they'll be able to access electronic documents with just a few clicks. For yet others, making their assets available to a wider audience of visitors or researchers is the main driver.

To create a virtual resource library, an organisation may wish to digitise all or some of the items to which they hold the intellectual property rights, which may include: books, manuals, whitepapers, documents, photographs, microfiche or other film stock, three-dimensional works, artworks, rare and precious specimens… The BBC, for example, is currently digitising its content – one million hours of video and audio – and considering making this available for a small charge[1].

Scanning and storing documents electronically, however, is just one part of the process. Information managers and informed users will also be keen to ensure that electronic assets are properly meta-tagged (which often involves setting up many new metadata categories and tags), organised, catalogued, captioned, and subject to the appropriate digital asset management (DAM) system.

Drivers for digitisation include improved preservation of assets; making assets more accessible and attainable to staff and users; more effective communications within and without the organisation; and ecological considerations e.g. reducing hard copies and the natural resources required to produce them… Digitisation does require an investment in technology, staff and time but these costs are quantifiable, allowing companies to measure their return on investment. One measurable return, depending on the nature of the organisation, is increase in virtual and physical visitor numbers.

About the author

IAIN DUNBAR is General Manager, UK Operations, LAC Group. LAC was established in the USA over 25 years ago and the information management consultancy and services specialist launched its UK operation in 2011. Iain is a seasoned expert in strategic information and asset management and previously held director posts in the library and collections management technology fields.
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THEY ARE ESSENTIALLY THE NEW HYBRID LIBRARIANS OF THE 21ST CENTURY

A leading US and UK news service sought advice on workflow and process improvements from information management specialist LAC Group. In order to reduce overall library and archive operating costs and to gain efficiencies and enhanced service levels they chose to outsource their complete information management process in the UK and US to LAC Group. An internationally renowned news service, the company provides news and publicity services from heavy-hitting topics to entertainment and local news. The outsourcing has resulted in the creation of a digital library and of a group focusing on video resources.

Initial discussions encompassed specifics such as business process consultancy for the library and archives-related services, as well as recommendations to reduce overall library and archive operating costs and ways to manage the archives more efficiently. Work for the film and videotape side included reducing the overall library footprint as well as increasing internal use of digital assets and expanding content monetisation opportunities from within the collection. In the first year of operation with LAC Group, the costs of operating the services were reduced by almost 50 percent whilst improving services and support.

TRANSFORMING TO A DIGITAL LIBRARY AND RESEARCH CENTRE

The first step was entrusting LAC with the management of the research library and its transformation to a digital library and research centre – creating an internal resource for expert research and news information support for mission-critical news functions. The decision was made to move to a digital research facility from an existing research library, the decision reflecting the changing nature of research tools and the opportunities prevalent in the digital age such as the option for anyone in the organisation to conduct searches and obtain information direct from their own computer.

The library archives comprise around 90,000 linear feet of onsite, environmentally controlled physical storage and an additional 106,000 cubic feet of holdings at offsite archive storage facilities. As part of the work on the digital library & research centre, LAC demonstrated how the organisation could achieve ongoing competitive advantage and more efficient management of their archive assets. Managing the digital resources, prioritising content, mining content and monetising the archive material was also important and so LAC presented strategies for these and demonstrated how to apply the recommendations. As a result, the company decided to completely outsource the library and archive operation and to use LAC Group's Managed Services operation for its expertise and proven track record. This meant that the news giant was able to focus on its core business of getting the news on air.

Millions of dollars have already been saved by executing these plans whilst also improving storage efficiencies and addressing environmental concerns.

One of the latest projects has involved creating a new Digital Research Sharepoint portal across the entire organisation. The portal provides help tips, search suggestions, and direct links to over 30 third-party research providers such as Factiva, Proquest, Facts on File, Gale and Jane's. LAC Group has also expanded digital delivery of research and content to a variety of mobile devices including the iPad and Blackberry.

The managers of virtual libraries are typically known as digital archivists, digital preservation officers or digital asset managers. As Rob Corrao, Chief Operating Officer of LAC Group, comments, "They are essentially the new hybrid librarians of the 21st century. They still possess exceptional organisational dexterity, and an unrivalled commitment to the preservation of our history, now coupled with technical expertise and proficiency, necessary to properly organise and manage our virtual resources. In addition to the time and effort required for organising and protecting material in digital form, virtual librarians or DAMs also: handle copyright issues; license technology; serve as database administrators for our virtual-reality-networks (VRNs); and, they evaluate, purchase and manage digital and on-line content from vendors, including web content and online marketing tools. They assign identification markers within the electronic data, known as metatags, to properly catalogue electronic material for high-demand access, and even manage our numerous iterations of our software and hardware, often referred to as new releases, versions and updates."

According to *The New York Times*[2], there were over 20,000 people working as digital asset managers in 2009, in a rapidly evolving digital market, where the demand for these new skills is expected to triple over the next decade. The LinkedIn Digital Asset Management Group already had over 8,000 members as at January 2012. **iQ**

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BigData.
So what?

RODNEY HAYWOOD takes a
bus trip and muses on BigData.

Sometimes it takes a bus trip to connect the dots. In my case today these were BigData and a *Wired* magazine article.

We have all been hearing a lot about big data lately. If a vendor has little to say, or possibly said everything they can, about Cloud then they just search and replace the marketing materials with the phrase 'Big Data'. We are not at the stage where McDonalds has decided to replace the BigMac with the BigData burger so the consumer world is safe for the moment, but most CIOs are probably getting their in-tray full of promotions and case studies.

Whilst I get big data and see its value, I have personally struggled with the realities of execution. We have been reading about the increasing demand of developers skilled in Hadoop and I have a friend who is a CCIE [Cisco Certified Internetwork Expert], got into Cloud and is now chasing the Hadoop angle. But to me BigData itself brought no real shift in ability to execute here. It might be cheaper and easier to store and process big data these days, but the insights have always been a human effort, and the human effort to develop the analytics takes intellect and scale.

There was the rub – not all humans have the same intellect and humans don't scale in the specialist areas. I have another friend who works for Oracle in demand planning. He's real smart at building data mining for global companies that need to forecast all sorts of whacky things. Yet he is very specialised and uses some real high end software. The gap between those people with big data and those who can do something with it has always irked me.

So here I am on the bus reading *Wired* on my iPad, as you do – an article entitled 'Can an algorithm write a better news story than a human reporter?'. The premise is that given large amounts of statistical data companies such as Narrative Science can turn it into a news story that is very insightful. They started out doing this with children's baseball games. Feed in the play-by-play data and it generates a story such as this:

Friona fell 10-8 to Boys Ranch in five innings on Monday at Friona despite racking up seven hits and eight runs. Friona was led by a flawless day at the dish by Hunter Sundre, who went 2-2 against Boys Ranch pitching. Sundre singled in the third inning and tripled in the fourth inning … Friona piled up the steals, swiping eight bags in all …

Baseball, financial markets, they can do some amazing stuff. Many companies are actually using machines to find insights and produce prose.

Once Narrative Science had mastered the art of telling sports and finance stories, the company realised that it could produce much more than journalism. Indeed, anyone who needed to translate and explain large sets of data could benefit from its services. Requests poured in from people who were buried in spreadsheets and charts. It turned out that those people would pay to convert all that confusing information into a couple of readable paragraphs that hit the key points.

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And the subject matter keeps getting more diverse. Narrative Science was hired by a fast-food company to write a monthly report for its franchise operators that analyses sales figures, compares them to regional peers, and suggests particular menu items to push. What's more, the low cost of transforming data into stories makes it practical to write even for an audience of one. Narrative Science is looking into producing personalised 401(k) financial reports and synopses of World of Warcraft sessions – players could get a recap after a big raid that would read as if an embedded journalist had accompanied their guild.

"The Internet generates more numbers than anything that we've ever seen. And this is a company that turns numbers into words," says former DoubleClick CEO David Rosenblatt, who sits on Narrative Science's board. "Narrative Science needs to exist. The journalism might be only the sizzle – the steak might be management reports."

This is where the dots connected and I became a lot more relaxed about big data. Here we have the birth of what can start to give reality to big data capture and processing. Whether you view it as AI, clever algorithms or plain ole automation does not matter. Looking forward you can see how companies can cheaply and easily generate business insights from the data they collect.

Until these analytic services mature you might want to brush up on your hadoop skills, but in the future you might just start getting more emails from an automated account like the following.

"Rodos, yesterday there was a flood of traffic on the fibre channel network that was generated from workloads in the Melbourne IaaS availability zone. Looks like this was mostly from a specific customer and I also picked up that their Unified Communications workloads in the UCaaS nodes in Singapore peaked. The company in question just listed on the stock exchange in Hong Kong and forecast interest in their services, if it continues at the rate, will cause increased workload that will take the Melbourne availability zone B to 90% capacity. Last time zone B hit 88% capacity (Sept 2014) SLAs for 2 customers were broken. Just a heads up, regards Siri". iQ

• This article reflects the author's personal opinion and does not represent the views of his employer.

About the author

RODNEY HAYWOOD has participated in the IT industry for more than 20 years with a strong background in data centre, storage and virtualisation technologies. In 2010 Rodney was awarded winner for 'Personal Innovation – Technical Excellence' for his work on development of Australian cloud services at the ARN IT Industry Awards. Furthermore, he is also an Executive board member of the Storage Networking Industry Association (SNIA) of Australia and New Zealand. Today Rodney works at Optus as Manager for Cloud Architecture & Development where he continues to develop Cloud based services for one of Australia's largest telcos.
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Digital data hoarding
and the implications for RIM professionals

Now is a critical time for RIM professionals. We are confronting a range of information risks and many of these risks stem from misunderstandings about the true costs of digital storage. This article will explore how trends in digital data storage impact on the work of RIM professionals.

BY **JANET KNIGHT** AND **KATE CUMMING**

CHEAP STORAGE + EXPONENTIAL DATA GROWTH = NO PROBLEM?

It is true that digital storage containers are genuinely cheap and that their cost has drastically reduced in recent years. In the year 2000, the disk cost per gigabyte of storage was $9.14. In 2010 the price was a mere $0.08.[1]

In recent years, with the rapid expansion in digital business environments, increases in computing power and decreases in perceived storage costs, there has been a corresponding exponential growth in volumes of digital information. The IDC *2010 Digital Universe Study* estimates that, globally, digital data will grow by 44 times over the next decade, from 0.8 zetabytes to 35 zetabytes.[2] This translates to an annual information growth rate of 57 per cent.[3] Considering the reduction in data storage costs, these drastic rates of information growth appear sustainable. However, the time has come to confront the reality of what these increased storage rates actually mean.

MORE DATA MEANS MORE WORK

Uncontrolled storage volumes will drastically increase the volume of daily work for RIM professionals. Information governance consultant Barclay Blair has quantified this increase, calculating that by 2020, "the amount of data requiring some type of information governance (ie, for privacy, compliance, custodial protection, confidentiality or absolute lock down purposes) will nearly double". He estimates that within all the vast volumes of data our organisations will create

in this time, "the number of files requiring some kind of information governance will be over 90 per cent".[2]

2 STORAGE MAY BE CHEAP, BUT THE SYSTEMS THAT ENABLE US TO USE STORED INFORMATION ARE NOT

The expenditure on technology to make use of stored data volumes is rising rapidly. Blair has compared the total expenditure on digital storage in 2000 and 2010 and concludes that in 2010 "we are spending as much on storage… when the price of raw materials – disk drives – has dropped to 1 per cent of what it was".[1]

Today, instead of spending money on storage containers, we are spending money on the management of the information inside the containers. Due to the volumes of data we have under management, we are spending vast amounts of money on software to access and utilise the information we have stored.

This is because in business, we don't just need to store information, we need to use it. There is no business benefit to the Indiana Jones-style scenario of the limitless warehouse filled with boxes. To use the volume of information we store, to manage it, to repurpose it, value it, authenticate it and leverage its business value, we are having to scale up our software spends to completely unsustainable levels.

3 PROCESS COSTS ARE RISING IN ALL OTHER ASPECTS OF INFORMATION MANAGEMENT TOO

The "keep everything because storage is cheap' attitude is escalating costs in many other areas of information management practice. In 2010, Symantec surveyed thousands of its international customers and con-

Story snapshot

- This article will challenge two key and related digital storage myths: that storage is cheap; and that it is economically viable and sustainable to continue to store all the digital data our organisations create.

- It will also explore what RIM professionals can do to start re-establishing some control over the digital information environment.

cluded that "infinite retention results in infinite waste". They found that less than half the organisations they surveyed had an information retention plan to flag which corporate information should be kept and which could be thrown away. Symantec concluded that the indefinite data retention that results from this practice "leads to rampant storage growth, unsustainable backup windows, increased litigation risk and expensive and inefficient discovery processes".[4]

We would argue that these are only the short-term costs. There are other significant ongoing and long-term management costs that also need to be considered.

These costs arise because digital information is hard to sustain. It is costly to carry through system change and to export into new business applications. Proprietary software, hardware, formats and configuration documentation make it very challenging for information to remain robust and useable in an era where system migration windows are shrinking to 18 month timeframes.

Attempting to remove key digital records from these complex environments is becoming a less and less valid option. Digital storage media are fragile and unlikely to be useable for more than a 10-year period, and too much
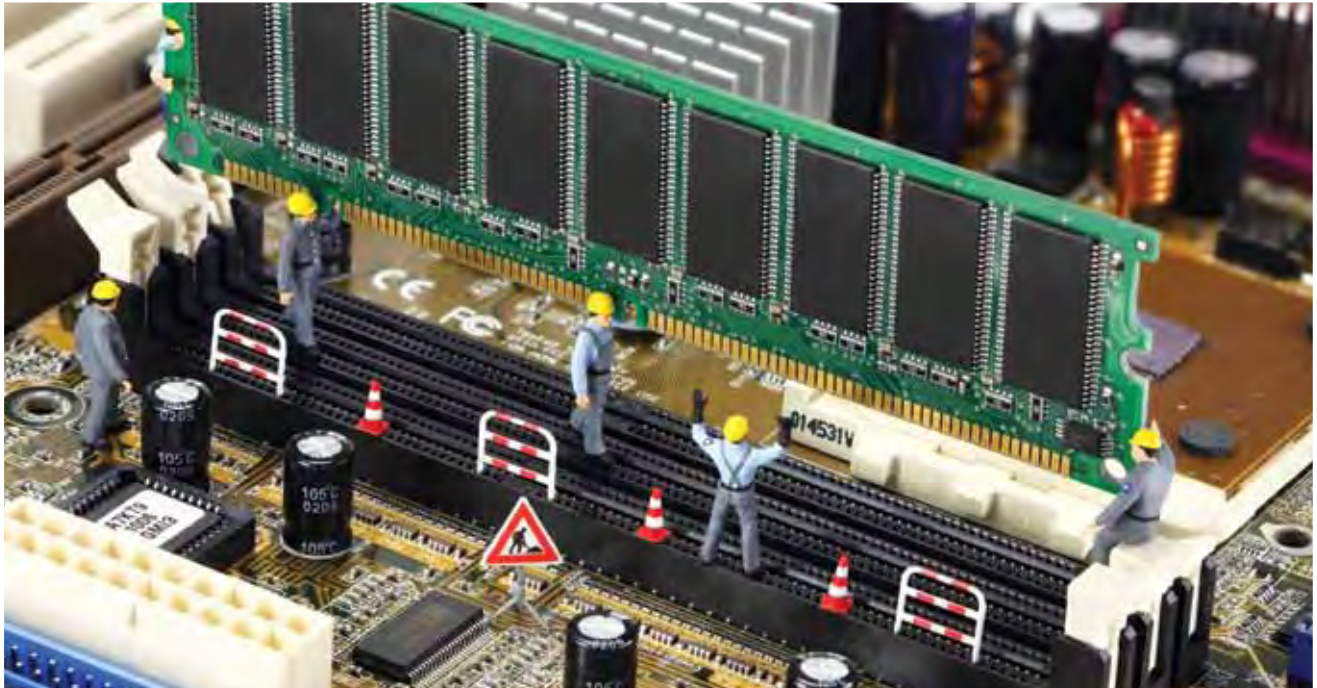
data already has been lost through undocumented moves to offline storage environments.

Carrying information forward is therefore a complex, time consuming and expensive process. We cannot do it for all information, particularly if the volume of that information is growing each year. We have to be strategic. We have to recognise that while storage is cheap, managing information for even the short to medium term is not. Focussing on the low costs of storage containers has distracted us from the increasingly unsustainable costs of genuine digital information management.

The idea that we can simply keep all our digital information, run Google over the top and have reasonably good ongoing access to corporate data is not an information management solution, it is a delaying tactic. Within a very short time frame, systems will require migration and real decisions will have to be made about what is to be carried forward and what is not. With the data volumes and ICT management pressures in modern organisations, the genuine risk is that strategic retention decisions will not be made at this point and information of real and ongoing business value will be lost in amongst the vast and unimportant data stores that cannot be carried forward.

As a profession, we need to be honest about the increasing complexity of RIM work. There are no simple solutions to the challenges we face, but there are strategic ones. These solutions are multi-faceted, require cross-profession collaboration, planning and staffing, and need to be tightly aligned to risk and business outcomes. Storage may be cheap, but the solutions to our storage dilemmas are not. As difficult and as costly as they are, however, it is critical that we start developing these complex solutions now.

To keep creating these vast data stores without any real management structure behind them is to continue to create either one of two critical business risks. Either:

• the ongoing creation of immense legacy data problems that will need to be dealt with in the not too distant future, or

• the ad hoc, uncontrolled destruction of key long-term business information assets that cannot be proactively identified and managed in amongst vast organisational data pools.

Both of these scenarios are untenable, organisationally and professionally.

Our concerns are not idle speculation. Gartner has predicted that by 2016, 20 per cent of CIOs in regulated industries will lose their jobs for failing to implement information governance effectively across their business systems.[5] Poor data management practices and associated business information loss are already starting to impact on organisations. As RIM professionals we must start to stem these losses and protect key business information assets.

THE SOLUTIONS

The problems of digital data retention are significant but not insurmountable. Here are some strategies to consider.

■ Implement strategic digital disposal

We need to stop seeing disposal as a retrospective, compliance-based requirement. It needs to be a proactive, flexible and strategic tool to help protect your organisation's core business records. Disposal authorities should be used as active information management tools, with their principles applied in system design, raised in discussions with ICT colleagues and considered in planning exercises for migration and other ICT initiatives.

The implementation of the business intelligence contained within retention and disposal authorities in digital business systems will help organisations to know what key business information needs to be kept and what can be thrown away. It will enable information that is past its use-by date to be routinely and systematically discarded, and information that needs to be carried forward through system change to be proactively identified, protected and managed.

AS A PROFESSION, WE NEED TO BE HONEST ABOUT THE INCREASING COMPLEXITY OF RIM WORK

■ Use information governance as a driver

As we have identified, digital storage issues are impacting on corporate information governance. Concerns about information governance could be an organisational driver to enable you to have conversations with your executive, CIO, ICT staff, business areas, system owners, users and any other parties who have a vested interest in the ongoing maintenance and useability of your core business information.

Working with allied information professionals to control the growth of unmanaged data across your corporate systems is a way to significantly improve information governance in your organisation.

■ Control new business systems

When considering your information storage challenges, don't forget new and evolving applications and environments like social media, the cloud, wikis and collaborative platforms. These are spreading rapidly across organisations and legitimate business is increasingly being performed in these applications.

Try to be proactive in new systems and platforms and do not allow massive, uncontrolled data stores to accumulate in these emerging business environments. Again, be flexible and proactive in your approach to data management. Try to build business-specific retention principles into workspaces such as SharePoint and other collaborative platforms, as these are environments where data volumes can easily scale beyond manageable levels.

■ Protect orphans

An emerging threat to accessible, useable business information is the creation of orphan records and systems. Sometimes when legacy business systems are too complex or poorly designed or too costly to map to new technology, a decision is made to set the old system and its contents aside and start processes afresh in a new business application. While this decision may be justified in many situations, it must not be an opportunity for 'orphaning' the legacy information.

If business information that still has business and legal retention needs is not to be carried forward into active business systems, then arrangements must be made for its 'adoption'. To mitigate existing risks, it is also important to identify the information orphans that may already exist across your organisation and to plan for their adoption.

CONCLUSION

We are concerned that if RIM professionals do not address some of the problems of digital storage and start to assert some control in this area, "We may be in the bad situation of being unable to afford either to keep or to throw away the data we generate".[3] As professionals concerned with the ongoing use and management of information as a primary business asset, this situation is untenable.

We need to stop being so simplistic in our approaches to digital storage, to debunk the myth that storage is cheap and be strategic with our information management. We need to start dealing with existing digital storage challenges and start scaling the data storage problem to something achievable. Routinely and accountably destroying digital information is one way to do this.

Unfortunately not many organisations are currently implementing digital disposal programs to flag what information they should be keeping and what they should throw away. In a recent survey State Records found that only 9 per cent of government organisations who responded to the survey had destroyed records in their line of business applications.[6] Therefore 91 per cent are creating legacy data pools to be dealt with in the future. Don't let this be you. Start being strategic and know what you can keep and what you can throw away. Don't be seduced by the mythology. Digital storage is not cheap and it can genuinely threaten your ability to practice effective RIM in your organisation. **iQ**

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About the authors

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KATE CUMMING is a Project Officer in the Government Recordkeeping program at State Records NSW.

Roll out! Roll out!

Get your successful EDRMS here!

Securing support and collaboration was crucial to the success of these implementation projects. The determination and expertise of Maria Kepreotes and Kate Gunton have driven the adoption and success of their systems. Here's how.

BY **KEVIN DWYER** AND **MICHELLE LINTON**

Maria Kepreotes

We know that sponsors and stakeholders who believe in improved productivity and risk reduction from implementing an EDRMS have a significant positive impact on the implementation, and those who disbelieve have a fatal impact on success. We also know that involving general staff within the business in the project team and utilising the functionality of the EDRMS to align business processes with good recordkeeping practices heralds increased success rates.

In our quest to find successful EDRMS implementations and explore what makes them successful, the discovery of information management units which not only espouse these views but also practise them with a willing business partner has so far been difficult.

It was a delight, therefore, to talk with Maria Kepreotes, Information Services Manager, NSW Crown Solicitor's Office in the second of the series of interviews we are completing with effective EDRMS project and information managers. The Crown Solicitor's Office sits within the Department of Attorney-

Story snapshot

- Understanding her unit's purpose amid the bigger picture of the NSW Crown Solicitor's Office has made all the difference to Maria's successful EDRMS.

- The key is to provide a user-friendly interface that makes the system easy to use.

- Client surveys are used to gain feedback and improve services.

Maria Kepreotes

General and Justice and it was no surprise to us when a few short weeks after the interview her team won the Department's Annual Achievement Award for Innovation.

EXECUTIVE BUY IN

The Crown Solicitor's Office Executive understands their obligations with regard to keeping good records of legal matters. Doing so is seen as important. So much so that Maria's role reports directly to the Executive. Her Information Services Unit is as much a part of practice management as any

of the solicitors. The relationship between Maria's unit and the Executive is such that when they have queries or misgivings, they call and ask questions and seek to understand records management rather than make assumptions.

AT YOUR SERVICE

When asked about what she saw as the purpose of the Information Services Unit, Maria was forthright, "We are here to provide a service to our clients so they can provide quality services to their clients. We try as much as is possible and sensible to offer our clients a choice of how they can access TRIM and use it."

It's a theme Maria returns to often during the interview, demonstrating a rare desire for an Information Services Unit to fully understand all aspects of the business needs and then design solutions which make it both easy for the users to access the functionality of their TRIM EDRMS and easy for the users to do their job.

To that end, the Information Services Unit has in its ranks the positions of a Continuous Improvement Officer, a Policy and Procedures Officer and a Precedents Officer. A prime purpose of those roles is to collaborate with the business.

"Initially the person appointed to the position of Continuous Improvement Officer had a training background, which was advantageous to the Unit as they understood our clients' knowledge of systems, having come from the Training Unit and especially having delivered extensive training to the Office. Over the last few years we have developed good relationships with the business and now the role is one which drives innovation in business processes," Maria said. "The competencies required for the role have become more demanding over that time. To succeed in the role the person needs to have the ability to analyse processes, have technical acumen and be a good negotiator. They also need to be able to manage the change process within the business."

The interest of the unit in the business and the trust of the business in the unit is simply demonstrated by the ability of Maria to get interest in and approval for multiple business cases that have improved the capability of the unit and the Crown Solicitor's Office overall.

MANAGING CHANGE

One might suspect, given the service orientation of the Information Services Unit and executive support it receives, that managing change might be quite simple. However, this is not quite so. Maria's team still have to deal with people who have to give up their tried and true ways of working when introducing new methods.

The key according to Maria is "To provide at the end of the day a nice, user-friendly interface that makes the system easy for people to use."

The pre-TRIM system was a tree structure based on 'Matters' and the initials of the solicitor handling the matters. Users were familiar with their directory structure and did not like moving to a search methodology for finding files. To ease the burden of change, a user-friendly interface was created which 'hid' TRIM from users and enabled users to quickly and simply search for their documents without having to learn new protocols. To get over the natural reluctance to accept change, users were shown how much faster searching was and how simple it was using the new system using their files. The 'show me' approach, rather than 'tell me', has become a standard approach to managing change.

THE KEY IS TO PROVIDE AT THE END OF THE DAY A NICE, USER-FRIENDLY INTERFACE THAT MAKES THE SYSTEM EASY FOR PEOPLE TO USE

CONTINUOUS IMPROVEMENT

According to Maria, information management has been a journey of continuous improvement at the Crown Solicitor's Office. Since 2003 they have been making minor and major continuous improvements to the functionality of TRIM and business processes. This started with scanning of all new correspondence and embarking on a project to scan the Crown Solicitor's reference collection. The collection included scanning old Crown Solicitor Advices, Opinions and Submissions back to 1945, converting a microfilm collection containing Advices and Opinions covering 1918 to 1934 into searchable PDF format and over 90,000 index cards allowing the electronic file to replace the physical file. The project is ongoing.

Another early advance for users was the automatic placement of the TRIM reference in the document footer and other metadata, such as the matter number, author and addressee in one simple registration process, thus minimising user input and error and enabling easy searches for the electronic copy.

Improving the ability of solicitors to complete their work efficiently is the driver for much of what the Information Services Unit does. Maria commented, "For example, one of our major challenges has been to do with emails. We have worked hard to provide tools for our solicitors to help them do their work. For example, we started years ago to develop a TRIM integration tool for emails, which registered multiple people's emails to a particular legal matter. Then we worked on adding metadata without users having to do it. Now we are using linked folders so that users can drag and drop their emails into the appropriate TRIM container. In all, the time taken to register an email has reduced from 60 seconds or more to one second. We added 170,000 emails to TRIM between February and September 2010 and another 65,000 within three months."

"By making the task of entering emails as a record in TRIM easy, we have been able move towards a situation where we will no longer have to print emails."

"We have been invited to pilot the use of iPads so that we can have documents in TRIM available in court, ending the sight of solicitors hauling large briefcases and document boxes stuffed with hard copy documents."

To ensure what they do is meeting the needs of their customers, the Information Services Unit completes a client survey every year and uses the feedback as input into future plans. **iQ**

Footnote: It is fair to say that Change Factory and Linked Training are on a mission to improve adoption of EDRMS; to change the mindset from compliance to assisting the business to continuously reduce risk and improve productivity. It was a delight to get to know Maria and find a person, and a business, not only espousing these sentiments but executing them well.

Kate Gunton

Previous experience in EDRMS implementations is now known to be a harbinger of success in subsequent programs[1], even when the initial implementation has not reached the desired goals. When Kate Gunton, Executive Manager – Property, presided over a project at Ausgrid to implement an EDRMS to 4,000 staff it was her drive that turned that previous experience into effective actions. The project success was noted by the awarding of the J Eddis Linton Award (Most Outstanding Group) for excellence and innovation in records management in 2010[2]. It was also a finalist in the AITD 2011 National Training Excellence Awards; Best Implementation of a Blended Learning Solution. Kate is an architect by trade and when you talk to her, it is clear it is still her passion. Yet she sponsored and drove a highly successful EDRMS implementation. Her insights into the project offer a unique, and highly practical business oriented viewpoint of how to make people stand up and take not only notice, but action as well.

OPPORTUNITY

When asked about the catalyst for the program, Kate was frank, "Records management was broken and it needed fixing. We had our burning platform. We were not meeting our own standards and we were faced at the time with the need to meet the 2012 digital recordkeeping standard. We would not have complied unless we changed things. That became our opportunity to rethink our software selection, our training approach, the configuration of our BCS and to develop robust recordkeeping policy and procedures."

KEY FOUNDATIONS

Kate uses a building analogy, establishing solid 'foundations' first as you would in the physical world of building, as she describes the five key foundations which needed to be in place for the project to be successful.

Foundation 1: Fit with systems architecture

"We didn't care too much about what the software was; we left that to an arm's length procurement process. What was important was that IT saw that the system chosen was robust, was going to be supported and would fit into the current systems architecture and also meet future architecture

Story snapshot

Kate Gunton

- A robust system fits your current system but has the capacity to meet future requirements.
- A steering committee provides a mechanism for feedback.
- Implementation was assisted by an internal brand and logo designed for all communications.

requirements. We chose TRIM for many reasons, but one was that it would provide a great back-end to future Electronic Content Management and Knowledge Management systems."

Foundation 2: Executive buy-in

Another key foundation for Kate was the establishment of a steering committee with hand-picked representatives from the business that could be assured of giving clear and robust feedback. "It was important that we played people to their strengths and had both informed and robust feedback. We achieved that."

An important point made by Kate was that it was never safe to assume that you had buy-in. It had to be earned by demonstrating the benefits to each business unit.

Foundation 3: Promotion

Kate is a great believer in the need to promote projects such as an EDRMS and good recordkeeping practices at every opportunity, even when at the early stages it was out of her comfort zone. She took on the responsibility of learning the benefits of an EDRMS rapidly and equipping herself and her team with collateral for consistent messages: presentations structured for different audiences, frequently asked questions and contingencies for anticipated questions of risk.

"There were several opportunities which presented themselves which if we were not ready would have meant we lost the opportunity to promote the project. For example, an audit of the self-insurance process created an opportunity to show how much easier it was to comply with requirements with an EDRMS in place. Without the collateral, the opportunity may well have been lost to clearly articulate and promote why the EDRMS rollout was going to benefit the stakeholders involved.

Foundation 4: Change management

The immensity of the change required was not lost on Kate. "To move from a mix of use of shared drives, team rooms in Lotus Notes, hard copies, scanned copies managed in inconsistent ways with inconsistent filing practices, security and naming conventions to a consistent approach of electronic records management that facilitated easy sharing of information and streamlined processes for managing information flow that increased productivity and reduced risk was a big ask. We needed a strong change management program, strong project management and clear leadership and sponsorship."

Foundation 5: Communication

Kate's architectural background came to the fore when she explained her thoughts on communication. "Architects are spatial thinkers. We think in a visual way. But I recognise that other people need to see things in different ways to me.

About the authors

MICHELLE LINTON,
Managing Director, Linked Training
Michelle is a Learning & Development professional with 24 years' experience in the planning, design and delivery of training programs. Michelle has developed and delivered innovative, outcome focused EDRMS training for over 30 government and private organisations since 2005. Michelle's pragmatic approach to learning strategies leading to application adoption has been enthusiastically welcomed by the industry, and she is a regular speaker at RIM events and contributor to industry magazines. Linked Training is the training partner in the REX project which was awarded the J.Eddis Linton Award for Excellence – Most outstanding group in 2010.
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KEVIN DWYER,
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Kevin is a Change Management professional with more than 30 years' experience in the planning, design and delivery of change management programs. Since 2001, and the establishment of Change Factory, he has been involved in many Change Management projects ranging from re-engineering of customs processes to reduce risk to creating and revising performance management systems to improve customer service outcomes at five-star resorts. His first EDRMS project was as the Change Management partner for the REX project which was awarded the J.Eddis Linton Award for Excellence – Most outstanding group in 2010.
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It's important that you use all the range of mediums and the range of learning experiences from experiential to self-paced. It's also important that you always beat the drum, repeating the message as different people will 'get it' at different times and at different speeds."

Recordkeeping as a topic, I think we would all agree, is viewed as a boring topic by the uninitiated. Kate, as a records management outsider truly understood, and even agreed with this viewpoint, and actively sought ways to make the project stand out. This included the use of an internal brand and logo encapsulated as REX which was positioned as a helpful superhero who made life easier. It resonated with the audience and captured their attention and interest.

"We used the logo in all communications including an intranet site, a desktop guide, posters, brochures, training materials and a range of promotion materials which we handed out at the superuser training. REX became synonymous with records management, and terms such as 'rexcellence' in records management became accepted as part of the normal language."

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ADVICE FOR OTHER SPONSORS
When asked for what advice she would give other sponsors, Kate offered four pieces of reinforcing advice:

"Promote the business benefit; if you can't promote the business benefit, then give up. Compliance is the last thing to sell."

"Be ready to engage well with the managers demonstrating the advantage to them, otherwise you will find yourself having to drill communications down directly to lower levels and you can only do this effectively a limited number of times."

"Ensure managers are trained as well as superusers in the use of the BCS and file planning, not just superusers."

"Train managers to help them make change happen, to get engagement." **iQ**

RMs abroad

Meet the ex-pat Australasian records and information management professionals who choose to live and work overseas. In this issue, we visit Queenslander **LYNDA BARRACLOUGH** in London.

The British Library

Lynda Barraclough
Curator of the British Library's Endangered Archives Programme, London

Inspired by a poorly-printed facsimile of *Beowulf*, the old English heroic epic poem of dire derring-do in ancient northern Europe, Queenslander Lynda Barraclough now enjoys the challenges of saving other rare, endangered documents for the British Library's Endangered Archives Programme which she curates in London.

"It's challenging and fun to find out about the material being copied and its context, and arranging this information in a way that fulfils everybody's needs," Lynda insists.

The Endangered Archives Programme (EAP) was set up in 2004, funded by the literary charity Arcadia http://www.arcadiafund.org.uk/ and administered by the British Library.

The EAP blog http://britishlibrary.typepad.co.uk/endangered archives/ says that it aims "to contribute to the preservation of archival material that is in danger of destruction, neglect or physical deterioration world-wide; a major and important task".

The list of fragile and threatened records salvaged for posterity ranges from East Timor Truth and Reconciliation documents to 14th-century manuscripts from Ethiopia and 7,000 unclassified glass negatives from Mongolia.

Lynda moved to Britain 13 years ago to study Anglo-Saxon literature, hence the *Beowulf* connection. It led to a "fantastic year" at the University of York in north east England.

"It seemed right to explore the texts as close as possible to the environment in which they had been written," says Linda. "The city itself, and the surrounding area, is lovely and the perfect place to delve into the works of Anglo-Saxon authors."

Then came the inevitable move to the really big smoke. She says: "Living in London is expensive so saving for the tuition fee and living expenses took a while, but it was worth it. Travel is always a good idea. But one has to be willing to make sacrifices."

She recalls: "I was born in Rockhampton, Australia and grew up in central Queensland. I moved to Brisbane to attend university and then Sydney where I completed my archives degree. While studying in Queensland I came across that

» IT'S CHALLENGING AND FUN TO FIND OUT ABOUT THE MATERIAL BEING COPIED AND ITS CONTEXT, AND ARRANGING THIS INFORMATION IN A WAY THAT FULFILS EVERYBODY'S NEEDS «

rather poor facsimile of *Beowulf*. It was dull and difficult to read. I was struck by two things: that the manuscript had survived and was still available for me to study even though I lived on the other side of the world. I decided to become an archivist.

"Following this I worked with archives/manuscripts and modern records. Then I decided to move to the UK to work as an archivist and records manager, and go back to university. I now work with microfilm and digital facsimiles, and can help others connect with archival material that would otherwise be difficult to access."

So, what are the best parts of her work as an archivist/recordkeeper? She answers directly: "The variety of positions and experiences available and, when working with material, the opportunity of learning about other people, their lives, their beliefs etc.

"Currently EAP creates surrogate copies of endangered material, promotes professional standards of care for archives and increases access to rare or unique records for research. I enjoy finding out about the records being copied by the projects. I also like discussing cataloguing: it's challenging and fun to find out about the material."

What differences in archive and RM practice has she noted in the UK? She considers: "Not many. There are differences in terminology. For example, in Australia I did arrangement and description and created finding aids; here I create catalogues. Depending on where you work, here you may be required to have a working knowledge of Latin. There are few jobs in Australia where this would be the case." **iQ**

- For more information about EAP or queries regarding its project grants contact Lynda by email at endangeredarchives@bl.uk or by fax at +44 (0) 20 7412 7858.
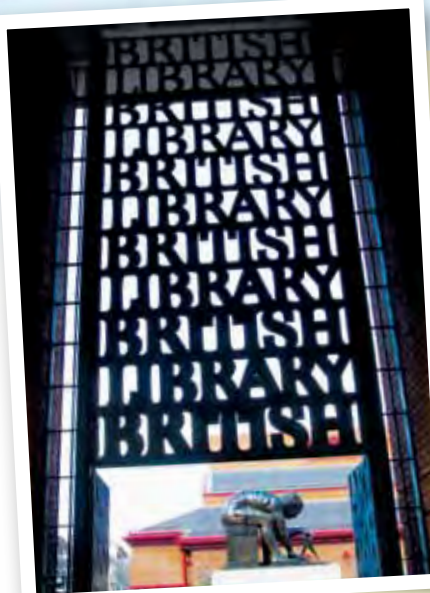
The iQ lowdown

What is your personal benchmark for success?
"That I be interested in whatever I'm doing."

How do you like spending down time?
"I like reading, especially with my new e-reader, and watching movies. During the summer I attend events with the English Civil War Society of which I'm a member."

What book(s) are you currently reading?
"I'm reading *A Universal History of the Destruction of Books* by Fernando Báez and *The Bandit of Hell's Bend* by Edgar Rice Burroughs. Archives, history and adventure; perfection!"

Which movies have you enjoyed recently?
"The Woman in Black."

When and where was your last holiday?
"I spent a week over New Year with friends in Ludlow, a 900-year-old market town with a beautiful Norman castle ruin, in Shropshire on the Welsh border. The choice was decided by our requirements – we needed a self-catering house that would accommodate seven people and a dog. We ended up in Ludlow. It was an inspired choice. Lovely little town perched above the River Teme and surrounded by the beautiful but very chill hills and countryside."

A response to the increase in identity- related crime

The ongoing shift towards an online environment means we will continue to see an increase in identity-related crime. An integrated effort is required to design and implement a robust identity framework to ensure the privacy of individuals and the integrity of corporations and government agencies.

BY **ROBERT BROMWICH**

Story snapshot

- 'Corporate identity management' is a term that describes the strategies that have been developed to deal with the explosion of identity-related crime due to e-commerce.

- Reducing the effects of identity crime via a framework for identity management has become paramount for business success.

The explosion of online economic activity, coupled with an increased reliance by governments to utilise online technologies for information delivery and interaction, since the mid-1990s has seen a corresponding explosion of identity-related crime against individuals, government agencies and corporations, resulting in a major challenge for all involved in e-commerce (government regulators and tax collection agencies, consumers, corporations) to properly verify identity documentation and ensuring that access to such documentation is conducted in a secure manner. The development and deployment of strategies that deal with this issue can be described as corporate identity management.

In Australia, a 2007 government-sponsored survey indicated that 11.3 million persons access the internet on a monthly basis[4]. The same survey indicated that the majority of age groups (with the major exemption being the over 70s) were comfortable with utilising the internet for online commerce[5] activities.

Estimates of identity crime vary greatly across the industrial world. A recent United States assessment indicates the cost of consumer fraud alone at US$56.6 billion[6]. Estimates of the cost of identity crime in Australia is approximately AU$2 billion[7] with credit card fraud, in particular, being on the increase[8]. The ability for corporations to eliminate – or moderate – the effects of identity crime via a successful identity management strategy has become paramount for profitability and sustainable business operations.

For the purposes of this article, corporate identity management is *an effective strategy that properly and correctly verifies the identity of individuals, government agencies or corporate entities involved with any aspect of commercial, regulatory or governmental activity*. This covers the gamut of staff, suppliers, regulatory agencies, clients, contractors and consultants, financial institutions and other entities involved with any aspect of business operations. Current examples of this interaction include the 100-point identity check to open financial accounts, various government-sponsored Security Cards[9] [10] and the Tax File Number regime[11].

The growth of electronic commerce and online activity over the past decade has seen the challenge of properly and securely identifying information of clients, suppliers and other stakeholders in an increasingly electronic, networked and global environment critical for the ongoing operation of the business from a regulatory, corporate, reputational and financial context.

The 2007 United Kingdom HMRC information loss[12] [13] (where two CD-ROMs containing information on half the country's families was lost due to insecure protocols), the 2011 Sony Entertainment Network hack and the ongoing Queensland Health payroll debacle are three high profile examples that illustrate the ease of personal identity information can be disseminated into the public domain or corrupted to cause maximum and ongoing inconvenience to the community, impaired profitability for corporations and potential revenue loss to government.

To ensure compliance and maintain awareness of the ongoing requirements relating to identity management issues, a Corporate Identity Management Life Cycle (CIDMLC) is required to capture and integrate identity management into corporate operations. The involvement of all staff from senior executives to frontline staff is essential to ensure the ongoing success of the CIDMLC.

CIDMLC is a framework dedicated to facilitating the proper identification of those parties (individuals, corporate entities etc.) that the organisation interacts with. The level of detail associated with the CIDMLC is dependent upon the industry the organisation is operating in and the impact of specific regulatory requirements (for example financial and taxation disclosures).

For corporations, the CIDMLC comprises the following stages:

1 **Establishment:** Ensuring that credentials presented are verifiable, accurate and reflect the person or corporation

BUILDING A FRAMEWORK FOR IDENTITY MANAGEMENT

The principal effort of current online government activity is focused on participatory efforts in information delivery through web portals; engaging the community through online portals; payment claims through secure portals and like activity. Recent efforts on the regulatory front are evidenced by the recent parliamentary report on cyber-safety[1] and a 2005 agreement on a national identity strategy[2], coupled with a regime deployed by the West Australian government to ensure that the identity of prospective property sellers are properly identified after multiple properties were sold by persons impersonating the true owners[3].

furnishing such credentials. This involves proactive investigative work on the host organisation to ensure credentials reflect the authenticity of the supplier.

2 **Maintenance:** The utilisation of an identity access management framework – whether physical, electronic or an combination of the two – to ensure effective access of information and to develop an audit trail for any negative contingencies to furnished credentials.

3 **Termination:** Upon termination of employment (individuals) or contract (external corporate), all assigned privileges are revoked in a timely manner to eliminate the temptation of misappropriation of organisational resources.

4 **Historical Management:** Ensuring that credentials and acquired information are retained in accordance with statutory requirements in the event of litigation or investigation by regulators or individual complaints.

The benefits of a robust corporate identity management program include:

1 **Enhanced Security:** For clients, staff and other stakeholders as identity information is controlled through electronic and physical mechanisms.

2 **Financial:** Reduces the potential for fraud and misappropriation by internal and external influences.

3 **Trust:** Improves the ability for clients and organisations to transact business in a secure marketplace.

4 **Organisational:** Having a properly integrated and functional CIDMLC allows the organisation to better utilise information gathered to improve and enhance organisational planning and strategy for all stakeholders.

Liabilities of implementing such an identity management program include:

1 **Costs:** Effective program implementation requires a sizable financial commitment to ensure success. Program failure usually occurs when the system is poorly designed or lack of resources.

2 **Convenience:** Improperly designed and implemented systems reduces the integrity of the framework and exposes the organisation to increased risk of fraud.

3 **Technical/Technological:** Ensuring that proper IT security standards are deployed to ensure integrity of staff, electronic, network and physical infrastructure.

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4 **Regulatory:** Legislators and regulators introducing populist and ineffective frameworks in response to popular concerns and protests.

IN CONCLUSION

The challenge of corporate identity management in the current environment confronting organisations, regulators and individuals will be heightened with the ongoing shift towards an online environment. To combat the increased threat of organised (and individual and rogue) efforts dedicated to nefarious or ill-advised activities, an holistic and integrated effort along the lines discussed above is required by these stakeholders to design and implement an identity framework which is robust and secure yet enables the privacy of individuals and integrity of corporations and government agencies. **iQ**
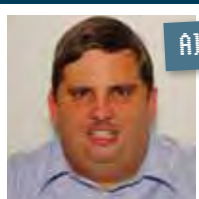
About the Author

ROBERT BROMWICH has recently completed a Master of Information Management majoring in Records and Archives Administration at Curtin University after receiving a Graduate Diploma of Management (2009) and a Bachelor of Business Administration (2006) at Central Queensland University. Professionally, the author is keen to develop a career assisting corporations and government agencies develop and integrate information practices in a dynamic commercial and regulatory environment, coupled with how organisations can adopt and implement effective identity management practices in a multi-model environment.
• The author can be contacted via Robert.Bromwich@live.com.au

Previewing

inForum – 3 big events over 3 days

This year, inForum is being held as a series of one-day multi-stream conferences in three different cities. The theme – **Business + RIM + ICT = Strategic Success** – will explore how records and information management works in conjunction with other key roles to achieve strategic success.

Melbourne: 28 August
Perth: 30 August
Wellington: 31 August

inForum

Each event location will have its own international program, duel stream and trade exhibition for just one day. This year, our keynote speakers hail from across the globe.

In September 2009, **Miriam Nisbet** became the first Director of the Office of Government Information Services (OGIS) at the National Archives and Records Administration. Miriam has previously served at the United Nations Educational, Scientific and Cultural Organization (UNESCO) in Paris as Director of the Information Society Division, in UNESCO's Communication and Information Sector and as Legislative Counsel for the American Library Association in ALA's Washington Office, working primarily on copyright and other intellectual property issues raised by the digital information environment. She will be appearing at both the *Melbourne & Wellington* conventions.

Alan Bell is the University of Dundee's Records Manager and Information Compliance Officer and Programme Leader and Hon Lecturer for the records management programmes offered by the University's Centre for Archive and Information Studies (accredited by RIM Professionals Australasia and the Archives and Records Association, UK & Ireland (ARA)). He represents the University at the Scottish Higher Education Information Practitioners Group and is currently the Secretary of the Forum for Archives and Records Management Education and Research (FARMER). He is a corresponding member of the Section Bureau of the ICA Section for Archival Education (ICA/SAE). He will be appearing at both the *Melbourne & Perth* conventions.

Karen Anderson, PhD, is the Foundation Professor of Archives and Information Science at Mid Sweden University and Professor II at Oslo University College. She formerly worked at Edith Cowan University in Western Australia. She is a member of the research team in the Centre for Digital Information Management (CEDIF) and her research interests include implementation of standards-based recordkeeping systems in the digital environment and the education and professional development needs of the archives and records management community. She is a Fellow of the Australian Society of Archivists; an Editor-in-Chief for *Archival Science*; a member of the Swedish Institute of Standards TK546 Committee for Records Management Standards and a Vice President of the ICA Section for Archival Educators and Trainers. She will be appearing at the *Perth* convention.

Michael Hoyle is an independent consultant and associate of the UK based International Records Management Trust. Based in Seattle in the United States, he has worked professionally in North America, Australasia, Africa, South Asia, the Middle East and the Pacific Islands. In late 2011 and early 2012 Michael undertook a digital records consultancy for the International Criminal Tribunal for Rwanda. Prior to becoming a consultant he held various positions at Archives New Zealand and the National Archives of Australia. He will be appearing at the *Wellington* convention.

Sherry L. Xie has a MLIS (McGill University, Canada), MAS (University of British Columbia, Canada) and is currently a PhD Candidate and Adjunct Professor at UBC. Sherry has worked as subject librarian, archivist and records manager in university and government settings in China and Canada. She is interested in researching on and creating solutions for digital information management and digital preservation. She will be appearing at both the *Melbourne & Wellington* conventions. **iQ**

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Silver sponsor
Bronze sponsor — **ezescan** transforming paper into knowledge

Melbourne: 28 August

Ibis Hotel,
Therry Street,
Melbourne

Leading the way for events, arts, culture, sport and infrastructure, Melbourne offers something for all types of conference and incentive groups. Set on the shores of picturesque Port Phillip Bay, the city is famous for its laneways, stunning waterfront precincts and trendy neighbourhoods. Melbourne provides an endless choice of restaurants, cafés and bars in original locations.

✳ **The keynote speakers at inForum in Melbourne are Miriam Nisbet, Sherry Xie** and **Alan Bell** (see page 45 for more details).

Other highlights on the speaking program include sessions with **Judith Ellis** and **David Eade**.

Judith Ellis is the owner and Managing Director of Enterprise Knowledge Pty Ltd. She will present a paper entitled 'An International Standards Framework for managing records for as long as required for organisational, social and cultural purposes'. This paper outlines the standards and related technical reports developed by the international technical committee for records management ISO TC46/ SC11 – representing the consensus of a wide range of jurisdictions from the developed and developing world.

Judith has worked in the information and knowledge management field for over 30 years. She has held various leadership positions with industry and professional groups and is currently a member of Standards Australia IT21 Committee, an ISO Technical Committee (TC46/SC11) and an ISO Task Force.

David Eade of the Objective Corporation is passionate about enabling cross-agency communities to grow and mature in order to improve policy development in Government and deliver better services to the community. As founder of the 'Government 2.0 in Queensland' Community of Practice he has helped to bring together public servants from numerous State and Local government agencies to transform the way agencies approach openness, engagement and collaboration. As Product Manager at Objective Corporation he helps design and build the technology to enable such transformation. His session is entitled 'Secure information sharing for smarter government'.

The program

- Keynote: Openness: Are we there yet (and how will we know)? *Miriam Nisbet, Office of Government Information Services, NARA, USA*

- Keynote: Digital Records Management in the Government of Canada *Sherry Xie, University of British Columbia, Canada* ICA

- Records in a SharePoint world *Anthony Woodward, Recordpoint, NSW*

- Tweets, check-ins and status updates: Keeping track of social media at Victoria University *Kathryn Crawford, Miles Menegon and Kirsten Wright, Victoria University, Vic*

- Secure information sharing for smarter government *David Eade, Objective*

- An International Standards Framework for managing records for as long as required for organisational, social and cultural purposes *Judith Ellis, Enterprise Knowledge, Vic*

- A proven approach to successful scanning projects *Fabian De Angelis, Ezescan*

- Information Technologists, Records Managers & Enterprise Content Managers: The case for aggregated information management roles *Joy Siller, Siller Systems Administration, NSW*

- Workshop: Benchmarking Records Management Practices *Rod Dilnutt, William Bethwey & Associates, Qld*

- Victorian Electronic Records Strategy: The future is now! *Cathy Meynell-James, Public Records Office, Vic*

- The getting of wisdom *Allen Hancock, Dept Human Services, Vic*

- Social media or business reality? *Kris Brown, TechnologyOne*

- Keynote: Digital (dis)engagement: Recordkeeping risks or recordkeeping rewards? *Alan Bell, University of Dundee, Scotland* iQ

Perth: 30 August
Kings Hotel Perth,
corner Hay and Pier St, Perth

Perth City Centre is located alongside the peaceful and picturesque waters of the Swan River, 20km inland of the Indian Ocean on the West Coast of Australia. The river and surrounding area provides a scenic outlook for the city of Perth as well as a place for recreational activities.

Visitors can enjoy one of the many river cruises which operate along the river, some offering dining and music as you spend a few hours cruising in and out of the city. The Swan River also provides an excellent scenic backdrop to enjoy while dining in Perth, and many restaurants have excellent river views where you can enjoy delicious meals while taking in the surrounding landscape.

The keynote speakers at inForum in Perth are Alan Bell and Dr Karen Anderson (see page 45 for more details).

Other highlights on the speaking program include sessions with **Göran Samuelsson** and **Julian Goringe**.

Göran Samuelsson PhD is Assistant Professor in Archives and Information Science at Mid Sweden University and Project Leader for CEDIF, the Centre for Digital Information Management. His session is entitled 'The Archivist and the Architect: Better information management by working together?'

His paper will suggest some ways to achieve the objective of working proactively together. It draws from research undertaken within the Centre for Digital Information Management (CEDIF) at Mid Sweden University. In this session, Göran will highlight the prerequisites for a joint master plan of the emerging information landscape.

Julian Goringe has 15 years' experience as a professional within the IT industry, currently positioned as Senior Partner & Alliance Manager at RSD in Switzerland. RSD are a privately held Swiss software company based in Geneva with a long-standing and accomplished history in archiving, records information management, and in recent years have pioneered the way for Information Governance. Julian, having initially attending Engineering School, furthered his education at Solent University in Southampton where he read Electronics and Communication. Having started his career as a technician before evolving into a consultancy role, Julian has worked on a number of global projects within multi-national companies. Today, Julian enjoys travelling through ASIA PAC flying the flag for Information Governance.

In his session 'Information Governance versus Records Management – What's the Difference?' Julian will discuss business drivers and challenges regarding the management of corporate information; difference and similarities between records management and information governance; and specific steps on kick starting an information governance program.

The program

- Keynote: Digital (dis)engagement: recordkeeping risks or recordkeeping rewards? *Allan Bell, University of Dundee, Scotland*
- The Archivist and the Architect: Better information management by working together? *Goran Samuelsson, Mid-Sweden University, Sweden*
- Information Governance versus Records Management – What's the Difference? *Julian Goringe, RSD S.A., Switzerland*
- Information overload: Identifying & protecting vital business information *Debbie Cutts, Fremantle Ports, WA*
- Secure information sharing for smarter government *David Eade, Objective*
- Running with the Red Queen *Dr Janine Douglas, Information Enterprises, WA*
- A proven approach to successful scanning projects *Steven Schulz, Ezescan*
- Recordkeeping: The evidence base for corporate social responsibility? *Ineke Deserno, Monash PhD Student, Belgium*
- Workshop: Benchmarking Records Management Practices *Rod Dilnutt, William Bethwey & Associates, Qld*
- Ending the cold war between RIM & ICT *Leith Robinson, PhD Student, Curtin University, WA*
- Information Technologists, Records Managers & Enterprise Content Managers: The case for aggregated information management roles *Joy Siller, Siller Systems Administration, NSW*
- Social media or business reality? *Geoff Moore, TechnologyOne*
- Keynote: Ownership, contested roles and cooperation in information management. Where do recordkeeping professionals fit? *Dr Karen Anderson, Mid-Sweden University, Sweden* iQ

Wellington: 31 August

Abel Tasman Hotel, Willis Street, Wellington

Arts, culture, fine dining and breathtaking natural scenery – that's what Wellington's all about. New Zealand's capital city is nestled between rolling hills and a stunning harbour, and has a vibrant and compact downtown area that's best explored on foot. In Wellington you'll discover an amazing range of cafés, art galleries, theatres, attractions and a humming nightlife. The gourmet and wine experiences of the Wairarapa region are also just a short drive away.

The keynote speakers at inForum in Wellington are Miriam Nisbet, Sherry Xie and Michael Hoyle, (see page 45 for more details).

Other highlights on the speaking program include sessions with **Andy Carnahan** and **Cassandra Findlay**.

Andy Carnahan is employed in Customer and Information Services at Wingecarribee Shire Council, the Local Government Authority for the Southern Highlands of New South Wales. He is responsible for ICT operations and systems, records and information management and all customer service channels. He is a senior member of the Australian Computer Society and has worked in ICT for more than 20 years.

His session involves a presentation and interactive discussion on 'Enterprise Context Management – An ECM model for 2050'. This workshop will update, refine and continue to constructively challenge the direction that recordkeeping needs to take to continue to add value to society.

Cassie Findlay is the Project Manager, Digital Archives at State Records NSW. In this role she is responsible for delivering infrastructure and processes for accepting, preserving and making available NSW Government digital State archives. She holds a Master of Information Management – Archives / Records from the University of New South Wales, and a Diploma of Management.

Cassie wrote the chapter on digital recordkeeping in the current edition of the Australian Society of Archivists' textbook *Keeping Archives*, and is a co-founder of the discussion group the Recordkeeping Roundtable. Her session is entitled 'People, records and power: What archives can learn from WikiLeaks'.

The program

- Keynote: Openness: Are we there yet (and how will we know)? *Miriam Nisbet, Office of Government Information Services, NARA, USA*

- Cutting across silos for a new RIM/ICT Future *Janet Upton, Land Information New Zealand, NZ*

- Records in a SharePoint world *Anthony Woodward, Recordpoint, NSW*

- Documents are relevant to the frontline *Heather Cameron, New Zealand Police, NZ*

- Thinking outside the EDRMS box: strategic business cases for strategic business solutions *Katrina Hinton, Objective*

- Recordkeeping made easy: Embedding records practice in business *John Roberts, Archives New Zealand, NZ*

- A proven approach to successful scanning Projects *Demos Gougoulas, Ezescan*

- Keynote: Digital Records Management in the Government of Canada *Sherry Xie, University of British Columbia, Canada* ICA

- Discussion forum: Enterprise Context Management – An ECM model for 2050 *Andy Carnahan, Wingecarribee Shire Council, NSW*

- People, records and power: What archives can learn from WikiLeaks *Cassandra Findlay, State Records NSW, NSW*

- Missing link? *Suzanne Jones, Electricity Authority, NZ*

- Social media or business reality? *Kris Brown, TechnologyOne*

- Keynote: Digital Records Transitions at the United Nations International Criminal Tribunal for Rwanda *Michael Hoyle, Independent Consultant, USA* **iQ**

Call for Papers insert in this issue

inForum 2013 – Canberra

The RIM Professionals Australia conference for 2013 will be in Canberra from 8-11 September and will coincide with Canberra's 100th anniversary celebrations.

Awards 2012

Winners of the J Eddis Linton and Jim Shepherd awards as well as the Recall Article of the Year award will be announced at all three locations in 2012. Awards will be presented during lunch at the winner's nearest location or if not present, awards will be posted to them. The awards will be re-announced at Canberra inForum in 2013 prior to the 2013 awards presentations.

ARE YOU IN THE RUNNING FOR THIS YEAR'S ARTICLE OF THE YEAR AWARD?

The Recall RIM Professionals Australasia Article of the Year Award will be announced, along with a host of other RIM Professionals Australasia awards, at the inForum convention in Melbourne on 28 August.

All articles published in the last four issues of *iQ* – November 2011 to this August 2012 issue – written by RIM Professionals Australasia members or employees of organisations which are corporate members of RIM Professionals Australasia, automatically go into the running for the award.

From a shortlist of three finalists, the winner will be determined by a panel made up of the Editor of *iQ*, Heather Millar, David Pryde, Chairman of RIM Professionals Australasia's National Board, and a representative of the award's sponsor, Recall.

The judges are looking for articles which are original, engagingly written, display a thorough grasp of the subject matter, and which contribute to industry information and debate.

Past winners have included a dramatic account of a famous RM legal case, case studies, and an entertaining look at the future of recordkeeping – Allan Hancock's 'Gordon Ramsay & Alphabet Soup. The future of recordkeeping is simple' from February 2011's *iQ*. This article went on to be republished in the UK's *Bulletin*.

Articles eligible for this year's Recall RIM Professionals Australasia Article of the Year Award include:

- *Where history meets current records.* By Noela Bajjali, November 11
- *MoReq2010 – for the management of electronic records.* By Andrew Warland, November 11
- *EDRMS planning: research applied to reality.* By Michelle Linton and Kevin Dwyer, November 11
- *Technology Survey 2010 – Part 1.* By Mark Brogan and David Roberts, November 11
- *Top End heads up on RIM advancement.* By Mike Steemson, November 11
- *Long distance study proves fruitful.* By Debra Leigo, November 11
- *Making the most of an audit opportunity.* By Olwyn Crutchley, February 2012
- *Wanted: proactive, innovative records managers.* By Chris Fripp, February 2012
- *Creating blended learning success.* By Michelle Linton and Kevin Dwyer, February 2012

- *2020: Navigating the Information Tsunami.* By Debra Leigo, February 2012
- *Information and cultural service convergence.* By Leith Robinson, February 2012
- *Technology survey – part 2.* By Mark Brogan and David Roberts, February 2012
- *Recordkeeping and ICT professionals working together.* By Janet Knight, February 2012
- *Tracking the carbon footprint.* By Dr Bob Pymm and Rachel Crease, February 2012
- *ISO 30300 for good corporate governance.* By Judith Ellis and Carlota Bustelo, May 2012
- *Information on demand services in a government setting.* By Natalie Johnson, May 2012
- *Enterprise Context Management 2050.* By Andy Carnahan, May 2012
- *At the risk of remaining unheard.* By Kevin Dwyer and Michelle Linton, May 2012
- *Promoting acceptable change for staff.* By Julia Waters, May 2012
- *IAM celebrations At Holroyd City Council.* By Ian Aird, August 2012
- *How to rebrand records management to encourage support and collaboration.* By Janet Knight and Kate Cumming, August 2012
- *Roll out! Roll out! Get your successful EDRMS here!* Michelle Linton & Kevin Dwyer, August 2012
- *Building IM success – with your users by your side.* By Catherine Doran, August 2012
- *A powerful nexus.* By Suparna Chatterjee, August 2012
- *A response to the increase in identity-related crime.* By Robert Bromwich, August 2012
- *Digital data hoarding and the implications for digital storage.* By Kate Cumming and Janet Knight, August 2012

This year's award winner can choose their prize – either a **15" Compaq Presario Notebook** (2GB RAM/500GB HD) or an **iPad2 16GB with WiFi**. Three finalists will be advised prior to inForum, and the winner announced at the Melbourne convention.

A word from our sponsor

Recall is very pleased to be on board as sponsor of the Australasia Article of the Year. All the articles this year have been extremely engaging, entertaining and informative. They show that our industry continues to create and maintain very high standards.

We feel that there is a certain synergy in us sponsoring this award. All of the nominated articles this year show a drive towards bigger and better solutions – and show us that as an industry we are looking at a very exciting future.

Recall is committed to maintaining the exemplary quality of records management that we enjoy here in Australia and the Pacific and we continue to lead the way forward by bringing together innovative technologies and quality industry experts to provide the best service and solutions for our customers. Our aim is to be their partner in business, and provide effective, secure and technologically advanced solutions.

recall™
Your Information. Securely Managed.

Business + RIM + ICT = Strategic success

… the formula sounds simple enough, but is it really as simple as it sounds?

BY **KATE WALKER**

I can say with utmost confidence that many records and information management (RIM) professionals have a somewhat 'strained relationship' with the information and communications technology (ICT) professionals in their organisation, and I'm sure that the feeling is often quite mutual.

Both parties have varied working practices, jargon (even using the same terminology for different contexts), project priorities, compliance issues etc., and it seems at times, that never the two shall meet.

We all 'know' that a productive and strong relationship with ICT is critical to maximise efficiency, ease of use, effectiveness, compliance requirements, user and company needs, but it's not always that simple.

While many ICT professionals may see RIM as being incremental in its growth and changes, RIM professionals know that there is a flurry of growth and changes and communicating this in language understood to others and any special requirements is the key to moving forward.

RIM and ICT professionals must work together to ensure that there is enterprise information management which is the effort and practice of reaching across all data and application silos embedded in the company/organisation operating infrastructure to bind them together so that information is delivered to the person who needs it, when they need it, and how they need it.

Collaborative partnerships with RIM and ICT must occur regardless of the organisation size as agility, accuracy and completeness of data and information delivery are the main goals.

So what are the areas that need to be addressed to assist with the collaboration?

- **People:** Including roles, responsibilities and incentives. *Best Practice: RIM and ICT collaboration*

- **Processes:** Including practices, workflows and information/data flows. *Best Practice: Trusted information*

- **Policies:** Including standards and business rules. *Best Practice: Information/Data Governance*

- **Technology:** Including interoperability, information/data sharing, ease of use. *Best Practice: Enterprise wide reuses and standards.*
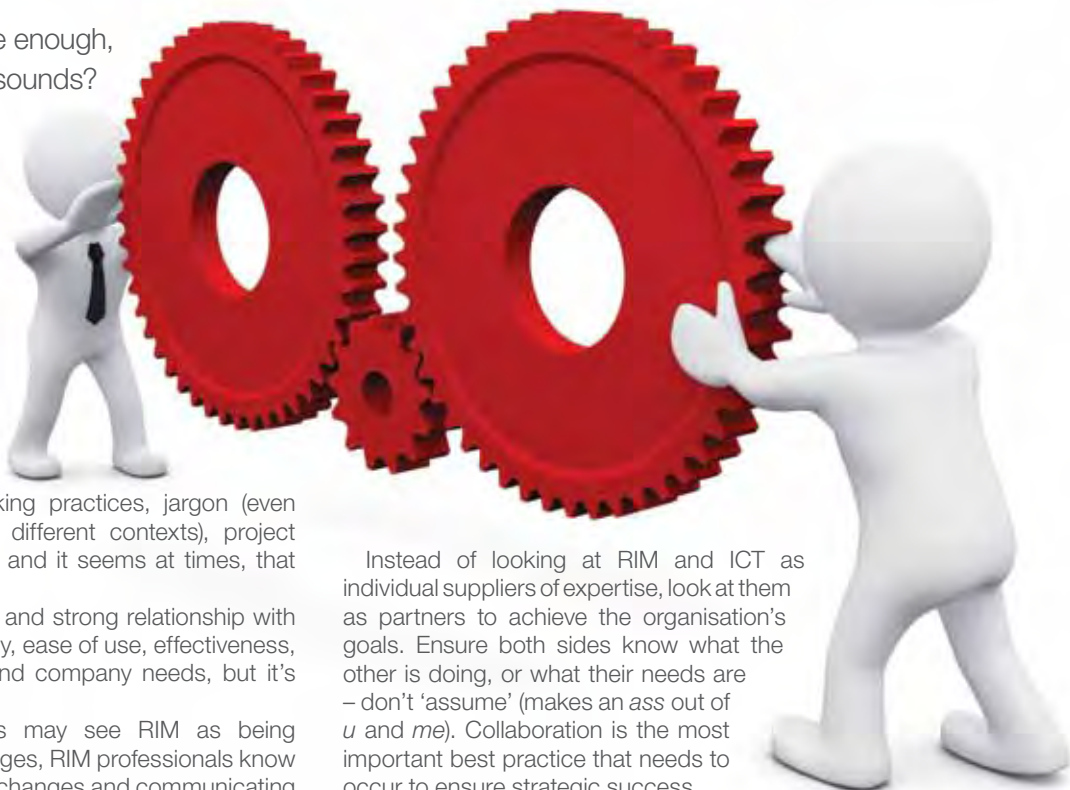
Instead of looking at RIM and ICT as individual suppliers of expertise, look at them as partners to achieve the organisation's goals. Ensure both sides know what the other is doing, or what their needs are – don't 'assume' (makes an *ass* out of *u* and *me*). Collaboration is the most important best practice that needs to occur to ensure strategic success.

Both RIM and ICT have emerged and continue to grow and change, but both parties need to realise that an alliance is required to ensure collaborative, complex and critical decision support. Users demand real-time intelligent information management and to achieve this, RIM and ICT need to ensure that the effectiveness of solutions are developed (and tested) for the respective groups or communities.

We all know that knowledge and information in governance is critical. Bite the bullet, go ahead and schedule a meeting with your ICT team and start looking at how you can 'work together' to meet the organisation's needs. Ensure that you reach a consensus where all parties accept a decision because of its overall value, even when they may have reservations about elements. Consensus is possible because the parties to it share information and can be sure that the results are known and that their interests have been communicated.

The area of information management and communication technology is particularly amenable to an alliance approach – take the step and work together. **iQ**

About the author

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IAM celebrations at Holroyd City Council

Holroyd City Council's Corporate Information Section recently celebrated Information Awareness Month (IAM) with a special week of activities from 7 to 11 May.

BY **IAN AIRD**

Holroyd has celebrated IAM for the past four years and incorporates the theme – Information in Action – with a special focus on its TREK program.

The program was launched during the 2010 IAM celebrations and is an acronym denoting the four pillars of our recordkeeping program at Council.

T = TRIM – Context is the core repository for Council's business information

R = Recordkeeping/compliance responsibilities under the State Records Act

E = Electronic – our strategic focus in line with Futureproof and other EDM strategies

K = Knowledge – access to relevant business information in varying formats.
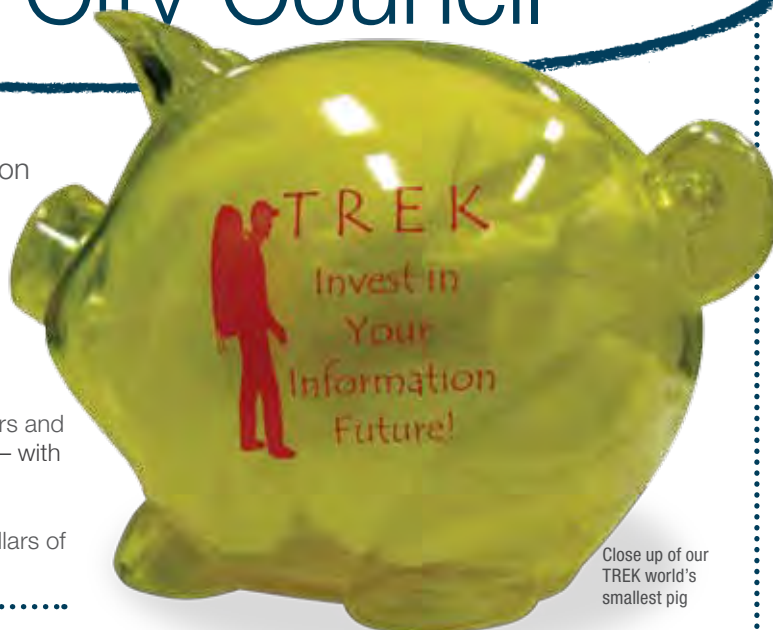
Close up of our TREK world's smallest pig

This acronym is underpinned by the idea of 'Information in Action', the end result of our TREK program which denotes that information is used and is widely available.

During the 2012 IAM we focused on fun events and used this as a vehicle to promote our recordkeeping activities to other staff members. It also proved handy in dispelling the myth that recordkeeping practitioners don't have any fun and 'just collect dust in the basement'.

The Sensational morning Tea

The Corporate Information Team

Activities included competitions and events which enabled staff to win 'the worlds smallest pig' with the TREK logo and words 'Invest in your Information Future' written on the side.

The 'Information on Demand' poster was scanned and turned into a virtual jigsaw puzzle and scanned again with strategic letters and words missing.

Staff could win a 'pig' for completing these puzzles and finding the missing words in the shortest time.

Other events included a 'Jumbo word quiz' with a recordkeeping theme and a quiz on the lesser known attributes of Corporate Information staff.

A survey of our team's performance was included encouraging feedback and suggestions for improvements by our peers.

A 'sensational morning tea' was held to engender awareness of our location within Council and also to share the culinary talents of our team members.

One activity which proved a real hit was the 'find the TREK man' competition. Our TREK man logo was hidden in a different Council section every day. Some staff members went to extraordinary lengths to find him and he was even the centre of a ransom demand by unscrupulous environmental officers!

This was a twist on the IAM theme 'Information on Demand' we hadn't expected! Awareness of our TREK program and IAM activities was heightened due to the above antics and has provided opportunities that money just can't buy.

In keeping with the 2012 IAM theme a 14-page desk reference guide has been produced and distributed to staff with various TRIM tips: TREK man is also featured throughout the guide filmed in various locations.

I would encourage any Records / Information Management sections to come on board and embrace the challenge of providing an informative and fun Information Awareness Month activity within your organisation in 2013.

This special IAM focus provides a wonderful opportunity to effectively promote your recordkeeping program amongst your peers, whilst helping to dispel some archetypal myths and having some great fun at the same time.

Happy TREKKING! **iQ**

IAM 2013

Why not submit a report on your organisation's IAM activities in 2013?

It's worth it – not only do you get CPD points for writing the article, you also receive entry into the running for the Article of the Year Award and attention for your company on being proactive in RIM.

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