THE ARM   The Newsletter of the Greenville Area Chapter of ARMA

MARK YOUR CALENDAR!

A Program on
Disaster Recovery
Presented by:
John Bauknight, Total Records
& Information Management.
March 9, 2004, at the
Greenville Country Club.
Be on the lookout for more details.

ARMA Members: Voting for the ARMA Board of Directors Is Now Open! Want to know more about the candidates? The website has a list. Visit the Member Resources Area to Cast Your Vote or vote by mail. Deadline: Feb. 17

News from the ARMA HQ website

Share Your Industry-Specific Expertise

The 2002 ARMA International Member Survey revealed that members are looking for industry-focused education. The ISG program has responded to members' requests by reviewing the program's structure and methods of providing focused education. As a result, the ISG program changed its structure and sharpened its mission to provide industry-focused and - valued educational offerings to ARMA members on a regular basis.

As part of this mission, the ISG program invites you to share an article, write an article, or participate in the ISG program as a subject-matter expert or advisor. Advisors work with the sector's content manager to identify industry trends and needs. They also play a pivotal role in helping to create methods for delivering industry-specific information to ARMA members and other RIM professionals. Advisory members and their content managers will work "virtually" via phone and/or email - no travel is required to fulfill their commitment.

Visit the ISG pages on the ARMA Website to read industry-specific articles submitted by subject-matter experts in ARMA's many industry groups, http://www.arma.org/membership/isg/contributed_articles.cfm We invite you to share your knowledge with the members of ARMA International. Complete the form at http://www.arma.org/callexperts to let us know what you know!

(Web Posted 12/15/2003)

For complete information and direct links, go to www.arma.org

Note: for those of you receiving this newsletter via -mail, for your convenience the ARMA International logo at the top of this page has been linked to the international website. Just click and you're there!

HIGHLIGHTS FROM OUR DECEMBER MEETING

Traditionally the Chapter's December meeting is less structured than other meetings, providing time for members to enjoy each other's company and a professional development seminar, or an inspirational speaker from outside the profession. The December 2003 meeting followed the same pattern. Members met at the Greenville Country Club on December 9 for the monthly board meeting followed by a brief social period, lunch, and a professional development speaker.

Dawna Quick, a college senior and Wofford College's 18th Presidential International Scholar, was guest speaker. Being selected as the presidential international scholar is an honor that is coveted by most students in the junior class. The scholarship is awarded to one Wofford College rising senior each spring. Students may not apply for the scholarship. Financial need, place of residence, and major program do not enter into the criterion for selection. The scholarship is also unique in that it must be used for a year of travel and study in third world countries around the world. The anonymous donor specifies the student chosen and should be "the singular student thought by the president of the college to be the person most likely to benefit mankind." The lucky student is directed to choose a study topic and begin planning a year of study in developing countries. Once the agenda is firmly in place, the college works with the student to establish reputable contacts in each country. Although the recipient is given a credit card (to be used in emergencies) and a camera, they are directed to live and work as ordinary people in the host countries. Furthermore, the student may only take as much clothing and equipment along as can be kept on one's person or comfortably carried on his/her back.

Ms. Quick was the first African American female chosen to represent the college as a presidential international scholar and only the third woman chosen for the honor. She is an honor student majoring in business economics. Her program of study dealt with employment trends in developing nations. She was specifically interested in labor and wage laws. During the six or so months she was traveling, Ms. Quick visited Mexico, Argentina, South Africa, Ghana, Poland, and China. Near the end of the program while she was enroute to China for the second time, she became very ill. Since there was a possibility that she could have been exposed to SARS on her first visit, Dawna returned to the United States and the remainder of the trip was aborted.

Ms. Quick's subject was not the traditional inspiration messages one usually associates with the holiday season; however, if you compare family life, wages, and buying power with our way of life, her content of her speech was truly inspiring and it brought home the fact that we in the United States are truly blessed.
Written by: Lucy Quinn

A Message from Your President

Changes! Changes! Someone once said, "nothing is for sure, except change". We have experienced some changes within our local chapter over the past few months, but as with other aspects of life it will make us a stronger chapter. I'd like to thank Brenda Hatton for all of her efforts during the time she served as President and for helping to get this newsletter published. As far as membership is going, we are seeing an increase in membership and welcome the new faces. As you join our chapter I hope you will get in and share your expertise with the rest of the group.

On the international level, ARMA has a new recruitment campaign. "The Power of One". It comes with a chance to win prizes for recruiting new members along with the chance to win a trip to the 2004 International Conference to be held in Long Beach, California. Check out the ARMA website at ARMA.org for further details or contact Chris Harris of JE Pope Company, our membership/ recruitment chair.

Speaking of the website, don't forget the Greenville Chapter website and the International website have information to help you in your daily duties. Everything from About ARMA to HIPAA Privacy Essentials is listed.

Your local ARMA board has been busy setting the course for the remainder of our fiscal year. Our next meeting will be Tuesday, March 9, at the Greenville Country Club. I hope to see you there!

Sincerely,
Janice Bowens

Remember this? From Stephen Covey's
THE 7 HABITS OF HIGHLY EFFECTIVE PEOPLE.
- Be proactive.
- Begin with the end in mind.
- Put first things first.
- Think win-win.
- Understand first – then seek to be understood.
- Synergize.
- Take care of yourself.

Advice from a book written years ago, but still good today.

Treasurer's Report

As reported by our treasurer, here is a summary of the treasury for the Greenville Area Chapter of ARMA as of January 1, 2004.

Checking Account Balance: $2255.19
CD: $2748.15

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Greenville Chapter - Board Meetings

The ARMA Board meetings are held the first Tuesday of the month prior to the regularly scheduled meeting. There important decisions are made concerning the chapter. Board members are encouraged to attend these meetings and, as always, the meetings are open to any member. For time of meeting and location, please contact Jinny Moran at 864-467-5211 or jmoran@greenvillecounty.org.

Look What's New: Streaming-Video Presentations from ARMA's 2003 Conference

Now available in the ARMA International Bookstore - educational streaming-video products!

We are offering several electronic records management-related presentations from ARMA's Boston 2003 conference in an interactive, streaming-video format with synchronized slides of the presenters' handouts. Learn about:

- e-mail compatibility and compliance
- the policies and technologies behind managing erecords
- a case study on implementing electronic document control by Weck, the winner of the 2002 Iron Mountain/ARMA International Award for Excellence

Also available are videos of several presentations featuring experts in the financial services industry, discussing some of the hottest RIM issues facing that industry. Watch and listen as attorneys, RIM professionals, and Securities and Exchange Commission representatives come together on panels to discuss the impact of Sarbanes-Oxley, records management standards and regulations, instant messaging, and email.

Available programs include:

- Electronic Document Control: An Implementation Case Study
- Email Accountability and Compliance Issues, Trends, and Alternatives
- Managing Electronic Messages: Policies and Technologies
- Records Management: Covering All the Bases
- Sarbanes-Oxley Act: Will Your Records Keep You Safe?

Each video presentation includes the presenters' slides synchronized with streaming video. You can navigate by sections or watch the entire video from start to finish. It's the next best thing to having been there!

Seven programs are available through the ARMA Bookstore for purchase individually or in packages. Once purchased, you have 30 days in which to view the presentation and print the corresponding slides. Visit http://www.arma.org/learning/streaming_video.cfm for program descriptions and ordering information.

(Web Posted 12/15/2003)

Go to www.arma.org for more information and ordering details.

Other Educational Opportunities

One-day seminar:
Get Plugged into the Legal Records Management Issues of Electronic Messaging
Wednesday, Feb. 11
Philadelphia, PA.
Sponsored by The Liberty Bell Chapter.

John Bauknight presenting:
Disaster Recovery
Tuesday, March 9
Greenville Country Club
For your reservation
Contact: Jinny Moran
Phone: 864-467-5211
email: jmoran@greenvillecounty.org

Wilmington-Diamond State Chapter
Of ARMA International presents
INFO XXII
The Challenges of Content and E-Records Management
Thursday, March 18, 2004.
Contact: Janice Bowens, Phone 486-4150 or Janice.bowens@hayssen.com for brochure.

Leadership Meeting – June 11-12 in Delaware

Greenville Area Chapter Presents Scholarships

In July of 2003, the Greenville Chapter's Education Committee was pleased to present scholarships to two deserving students. Todd Griggs and Brandy Pearson, both students at Greenville Tech, were awarded $200 each to help them further their educational goals. We extend Congratulations to these students for their academic achievements and wish them well.

Did you know?

Each year the Education Committee awards one or two scholarships to chapter members and/or dependents of active chapter members. For further information contact Lucy Quinn, our Education Chair.

Educational Moment

FILING 101

Color is the key to Speed, Accuracy, and Misfile Control

This is the first of a series of articles focusing on the fundamentals of filing. Some of the information may appear to be a review for many of you. However, as with any discipline, sound fundamentals will always breed success.

Imagine going into a grocery store and if every package had a white label with black printing. It would be very difficult to find what you are looking for, and if something were put in the wrong place, it would be hard to identify. Filing is either a visual process or a thinking process. Color allows a person to visually scan file folders, looking for specific colors\color combinations in order to identify a folder or a small section of the filing system where the record that they are looking for is located. Without color-coding, information on the folder must be read and evaluated. The person must think through where the record should be within the filing system. Color minimizes thought and makes filing faster and less prone to error. In addition, without color-coding, if a file is placed incorrectly within the filing system, to find the misfiled record would require a search of all the folders one at a time to find the missing folder. With color-coding, all you have to do is quickly scan the groups of color to identify a color that is in the wrong place.

There are three major color-coding file system types. Records are always filed by a primary index, which is how a folder is looked for and retrieved from the system. Typically, this is achieved by color-coding alphabetically by the first two or three letters of a person's or organization's name, or by color-coding numerically by a number assigned by a computer (patient#, policy#, employee# or social security number).

Alphabetic filing seems like the simplest system to use. If you know the name of the person, client, or company, you can go straight to the name and pull the file. However, consider that with a 2-color bar alpha system. "Mc" has over 729 possible color combinations; based on 3-color bar alpha you would have 19,000 possible color combinations. This dilutes the effectiveness of filing by color vs. thought. Alpha systems also grow unevenly around common last names like "Smith" and have a high incidence of "shifting" the system to accommodate growth. We recommend Alpha systems not to exceed 3,500-5000 records.

Straight numeric filing is the most common way to file records that are "natural" to reference by number (policies, invoices, accounts, claims, etc.). It is the simplest system to use because it is based on counting and reading of numbers in sequential sequence. For example, folder 20137 would be immediately to the right of 20136. Advantages of straight numeric filing include less error prone than an alpha system. Groups of color in numeric systems are always uniform in size and easy to see.

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If a name does change, there is no negative affect. Some disadvantages are: file activity will congregate at the end of the system where new charts are being added, creating bottlenecks. Older files congregate toward the beginning of the system, shelf space gets full, and there becomes no room to keep adding documents to folders. The system must be shifted forward to make more room for the older, flatter folders. When folders are removed (purged) from the system, these are predominately at the beginning of the system. But, since new records are added to the end, removing old records does not free up space where it is needed for new files, so the system must be back-shifted.

Terminal Digit filing is a great alternative to solve some of the major problems with medium to large size straight numeric systems. The Terminal Digit system divides the filing system into 100 equal groups based on a 2-color bar system and 1000 equal groups based on a 3-color bar system. In both systems, each section of numbers/color-coding is the same size, forming bold, consistent groups of color that are easy to visually control. Within each block of color, folders are then filed sequentially. This makes filing easy and fast, because a file will be retrieved by looking visually for a group of colors, and then quickly scanning the few remaining digits of the number that are filed side by side in numeric order. Misfiles are easiest to avoid and identify because of the bold color blocks. If a misfile does occur, the misfile is isolated to 1% of the total system. The system will always grow evenly and purges evenly, so shifting is largely eliminated. File activity is also evenly distributed throughout the system, eliminating bottlenecks. Essentially all "filing experts" recommend terminal digit filing for large applications because of the benefits to the records manager and her team.

Remember, implementing the "right" color-coded file system for your needs will reap great benefits for you and your company. Some of those include, control of equipment purchases, floor space savings, supply standardization, reduced labor costs, improved employee morale, accurate complete information, and improved office\department appearance and productivity.

At the J.E. Pope Company we help customers discover innovative ways to *organize, create, control,* and *find* items and information. Through a time-tested survey and analysis process, labor and space savings frequently exceed 50%. If you could know where everything is all the time, where it has been, and where it will be needed in the future, what would that change? Please feel free to contact me anytime if I can be of service.

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2003-2004 Greenville Chapter Officers

Greenville Area Chapter FY 2004 Board Members	PO BOX 61 Greenville, SC 29602
Officer Position & Other Duties	**Name & Address**
President/Chair Chapter Directory Chair	Janice Bowens Hayssen 225 Spartangreen Boulevard Duncan, SC 29334-9400 Phone: (864) 486-4150 Janice.Bowens@Hayssen.com
Vice President Program Chair Public Relations/Marketing	Jinny Moran Dept of Public Safety, Records Management Services 4 McGee St, Suite 119 Greenville, SC 29601 Phone: (864) 467-5211 Fax: (864) 467-5113 e-mail: jmoran@greenvillecounty.org
Secretary	Carole Barnwell Fluor Daniel 100 Fluor Daniel Drive Greenville, SC 29607-2762 Phone: (864) 281-4825 Fax: (864) 281-6121 e-mail: carole.barnwell@fluor.com
Treasurer	Ann B. Griggs Fluor Daniel RMS C101R 100 Fluor Daniel Drive Greenville, SC 29607-2762 Phone: (864) 281-5279 Fax: (864) 281-6121 e-mail: Ann.Griggs@fluordaniel.com
Board Member Nominations Chair	Gregory Scott WABCO Passenger Transit Division PO Box 11 Spartanburg, SC 29304-0011 Phone: (864) 433-6448 Fax: (864) 439-0176 e-mail: gvscott@ptd.Wabco-rail.com
Board Member Membership/Recruitment	Chris Harris JE Pope Company, Inc. 424 Battery Row Boiling Springs, SC 29316 Phone: (864) 599-5648 charris@jepope.com

Board Member	Brenda Hatton RMT Inc PO BOX 16778 Greenville, SC 29606-7778 Phone: (864) 234-9349 Fax: (864) 281-0288 e-mail: brenda.hatton@rmtinc.com