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eOrganizedWorld
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for Information Professionals
from Charlie Sodano

Managing Records During M&A

You just been told that your job has been eliminated because the company sold your division. They want you to stay around for another few weeks to help with the transition. Since they offered you a good separation package, you are only mildly angry. Of course you are upset and somewhat disoriented. Sound familiar? Been there, done that? It's not an uncommon occurrence.

In many instances, the company will give you some instruction about what kind of information you should transfer or share. Most of the time, there is little if any checking on the accuracy of what you do or don't transfer. These days, most of the information will be electronic, but there will be some paper, particularly if you have been around for awhile. How diligent would you be? After all, THEY just got rid of you. You don't want to burn any bridges, but organizing and transferring records will not help to get you future raises and promotions. You do a "good enough" job with the transfers and then focus on your future.

Suppose you are a records/information manager who has the job of collecting and organizing records from more than 100 departing employees. Knowing what the environment is like, what's the best way to attain your goal? Most employees will behave like I or you as I described above. However there will be some who will be very angry or naturally unorganized who will leave their records in a jumble. This normally is about 5% of the population.

You will probably get plugged in after the bomb is dropped. Make sure that you are aligned with your IT people. Keep instructions simple. I highly recommend the 3 piles approach for paper files, email, and other electronic files.

Pile #1 is the "good" pile. It contains items that are valuable to your successor.

Pile #2 is the "maybe" file. It might be good stuff but maybe not.

Pile #3 is the trash. Not useful to your successor without additional input.

Provide people with 3 bar coded boxes to sort their paper into. Send them an email with the bar code names and ask them to send back a summary of what they placed in them. Export the email strings as an msg file and store in an appropriate folder.

Your IT people should be able to move the 3 piles from email and personal shares into a common location.

Sorting out who gets what is never straight forward. Each department should have a nominated person who can direct the piles to the right place, but most people are loath to take on a new set of records which may have questionable value to them.

In the end, there will be a lot of records that will go unclaimed. The best approach is to store all of them for a period of 2-5 years. There will be a flurry of interest in some of them for about a year, then they will lay dormant and probably can be disposed of.

Of course if there is a legal litigation hold, some may have to be retained for a longer period of time

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A link to the EZine is also found at www-eorganizedworld.com

Contact us (consultants@eorganizedworld.com) for additional information about getting your records management program started. We'll give you more free advice and explain how we can continue to work together.

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What's new?
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ELN / LIMS

CambridgeSoft is working with Microsoft to enhance the ability of scientists to collaboratively share data across the enterprise through the integration of key technologies as well as to deliver these solutions through a cloud computing model. A working proof of concept of CambridgeSoft's flagship product, E-Notebook, and Microsoft SharePoint 2010 and FAST Search Server 2010 for SharePoint was recently demonstrated.

Information Management/Archiving

IBM announced the release of new content services for Lotus Quickr called DOCOVA Integrated that enables Quickr users to expand the [document collaboration](#) element of the platform into a complete document and content management solution.

This integration is especially important for Lotus Domino Document Manager users looking for a Lotus Domino-based migration option as DOCOVA Integrated Content Services gives Quickr users full control over the entire lifecycle of their content and documents through its customizable application framework functionalities.

Infotrieve, Inc. announced the release of the Mobile Library™ iPad app. With the Mobile Library™, users have secure access from anywhere to all corporate licensed electronic content and document repositories, as well as access to the world's largest collection of STM content. The Mobile Library™ is fully integrated with Infotrieve's Content SCM® content and rights management platform, and users can seamlessly switch from the iPad to their PC or Mac without skipping a beat, as the user's workspace is automatically synchronized across platforms. Utilizing Content SCM®'s full suite of rights management capabilities, the system ensures that corporate electronic content usage is fully compliant with all content licenses across the enterprise.

Enterprise content management (ECM) vendor Hyland Software has purchased privately held Computer Systems Company (CSC), a developer of business and clinical healthcare software and document conversion services.

Open Text this announced a huge enterprise content management (in the fullest extent of the term) release. Open Text says the new suite incorporates more than 90 products and services as it attempts to be the soup to nuts enterprise content management solution.

Snowbound Software, announced the release of its AJAX browser-based image and document viewer for Microsoft SharePoint 2010 content management system.

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