

In This Issue: How to organize electronic information – Part 1
Updates on Records, ELNs and Archiving.

eOrganizedWorld
the Online Information Management Newsletter
for Information Professionals
from Charlie Sodano

How to Organize Electronic Information – Part 1

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Many people preach about the importance of having good electronic records management systems. I wonder how organized their personal records are? Do they practice what they preach, or they “do as I say but not as I do”. Charity begins at home. Before I wrote this EZine, I took some time to audit my electronic record keeping practices. Here’s what I found (good news – I’m sure you’re not surprised!). About 90% of my archived information was stored as per the recommendations listed below. My email was also better organized than I thought, but in a different way than I would have preached. This will be described later. I was glad to have done the audit and gave myself some constructive advice on improvements.

How do you start getting organized? First perform your own audit.

Where is all of your important information stored? Do you readily know or do you have to “look around”.

Do you have “retention schedules” or at least do periodic (at least annual) house cleaning?

Do have a disaster recovery plan and follow it?

Are records that you intend to keep for a long time, >7 years, in an archive format?

Let’s start the preaching by assuming a bad, but not horrible scenario. All of your critical information is mixed in with non-essential things in one location in no particular order; you have no disaster recovery plan and haven’t paid any attention to file format. At least you know that the important things are in there somewhere. Your first step is to create folders with yearly labels 2009, 2008, 2007, etc. and sort everything into one of these folders. This is also the time to trash things that have no value to you. You can keep any other sub file system you like (expenses, reports, tax, etc.), but keep it under the yearly file structure. Starting with the oldest annual file folder, create a new subfolder called “review”. Transfer any items that have questionable value into this folder. Make a note on your calendar to look over the review folders in 6 months. You will probably find that there are more things to be deleted. Repeat your review every 6 months. If you manage to get this far, congratulations! You have begun to get organized.

Set up a disaster recovery system as soon as possible. The best simple choice to restore a trashed system is image backup, using software like Norton Ghost, Acronis True Image, or Windows Vista's Complete PC Backup imaging utility. Image backup is a process that can completely back up a partition or an entire physical hard drive on a low level, bit-by-bit basis. The backup process starts at the first block on the drive and reads every cylinder, track and sector until every bit on the drive has been backed up. The crudest implementation of image backup technology does not see partitions, files or any other arbitrary file system structures--it doesn't know if it's backing up data or empty space. More sophisticated software allows partition-level backup, only active disk cluster back up,

software compression, media spanning, and tape or disk output media choices. Performing an image backup is only half the story on how to recover an unbootable machine. The other half is how the disaster recovery part works. The machine died for some reason and won't boot after any necessary repairs. So, how do you boot the dead machine and quickly restore its operating system?

The alter ego to image backup is the ability to quickly reboot a failed system using nothing more than a universal boot CD containing a temporary OS with every device driver, and the image recovery software. The CD boots a dead machine, loads all device drivers, connects to the network and initiates the restore of the failed machine's OS partition.

In How to Organize Electronic Information – Part 2, I'll address email archiving and steps you can take to manage your entire archive more efficiently. What's the best way to find items in your archive? What are the pros and cons of metadata searching versus full text searching. Tune in next time.

Please pass on this EZine to those in your network.

To leave list or change email address, scroll to bottom.

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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Organizing

Autonomy Corp. announced that it has agreed to buy San Diego-based Interwoven for \$775 million. The deal, expected to close by the second quarter, is aimed at raising Autonomy's profile in the legal and compliance industry. Interwoven, founded in 1995, is a leader in Web content management, specializing in legal document management systems. With 4,600 customers worldwide, its clients include 1,200 of the top law firms.

Enterprise content management (ECM) can bring business process efficiencies and help the environment at the same time by reducing paper-based processes and the inherent latencies and costs, according to Gartner, Inc. Gartner has examined six areas in which organizations can develop strategies to become more agile and efficient while reducing the environmental impact of the business. Organizations are realizing that process improvements and the move away from paper to electronic processes can also bring green benefits, such as energy savings from paper production, distribution, usage and disposition, and transit through the postal system."

ZyLAB announced that the company has received a "Strong Positive" rating in Gartner's "MarketScope for E-Discovery Software Product Vendors, 2008"

Records

The Open Text Content Lifecycle Management (CLM) Services for SharePoint was certified to meet

the latest version of the U.S. Department of Defense's (DoD) Standard for Records Management certification (DoD 5015.2-STD V3 April 2007).

Pitney Bowes conducted a survey on Records Management In Government. Findings: Records management is a key component of successful federal operations. A majority of respondents (57 percent) rated the overall importance of records management essential in operating federal agencies.

There has been a broad change to records management systems within federal agencies. Yet, despite progress, agencies continue to experience unresolved performance issues. While 33 percent of respondents said the progress of records management in federal agencies significantly improved over the past five years, 56 percent said that there is significant room for improvement of existing records management systems.

Program managers within agencies are increasing the implementation of electronic records solutions. Forty-four (44) percent of respondents stated that documents are archived electronically.

The survey also found that a large group of respondents (41 percent) cited the lack of an explicit mandate requiring digitization as the main factor impeding an agency's focus on electronic records management.

ELN

Symyx released Notebook 6.1 supporting analytical chemistry and biology workflows. This second major release of Symyx Notebook meets the needs of scientists for capturing, querying, and reporting on numerous experimental methods and data across the highly variable spectrum of experimentation encountered by analytical chemists and biologists.

Dell combined servers and support with its convertible Latitude XT tablets and Rescentris, Inc.'s Collaborative Electronic Research Framework (CERF), to create a solution that is capable of managing research documents while providing a laptop computer designed to make laboratory records and data readily available throughout R&D organizations. The solution enables labs interested in automating processes, capturing and organizing data, documents, images and lab notes to get up and running quickly.

Archiving

Recent AIIM research found that 90% of organizations are using the PDF file format for long-term storage of scanned documents, and 89% are converting Office files to PDF for distribution and archive. Not surprisingly, paper is currently used by 100% of organizations, but when asked to predict the situation in 5 years time, use of paper for long-term storage dropped to 77%, whereas PDF rose to 93%.

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