



INTERNATIONAL®

INSIDE THIS ISSUE

President's Message1
 Board Introduction1
 Save the Date for the AGM!1
 E-Discovery Education.....2
 New Volunteer Introduction2
 Next Dimension of Information Management3

FIND US ON SOCIAL MEDIA

- LinkedIn
[@ARMA Edmonton Chapter](#)
- Twitter
[@ARMA Edmonton](#)
- Facebook
[@ARMA Edmonton Chapter](#)

HELPIFUL LINKS

- [ARMA Edmonton Chapter](#)
- [ARMA International](#)
- [ARMA International Education Foundation](#)
- [Journal of Canadian Records & Information Management](#)
- [AIIM](#)
- Governance & Record keeping Around the world
[English/ Français](#)

THE ARMAyeg Connector

PRESIDENT'S MESSAGE

Hello fellow ARMA Edmonton members!

2023 has been a year of renewal and growth for the ARMA Edmonton Chapter. We started out with only one Board member. That was me! We are now almost at full complement. Currently, we are in need to fill the Program Director role. In addition, Rick Stirling and Nicholas Fonseca came on as directors-at-large to support us as well.

Our Vice President (VP), Olena Kit, sent out a Needs Assessment survey, and what we heard from you is that you are interested in virtual events via webinars. In particular, you are interested in RIM processes and operational procedures. The survey also identified that many members prefer communication through email or newsletter.

I will be travelling to Toronto for the ARMA Canada Conference in July, and I am looking forward to getting together with other ARMA members to share ideas and gain new ideas to take back to Edmonton. I am also looking forward to connecting with you at the upcoming Annual General Meeting (AGM) in June.

Have a wonderful summer!

-Vera Beck

NEW BOARD AND CALL FOR NOMINATIONS

We would like to introduce our new ARMA Edmonton Chapter Board of Directors for the 2023/2024 term:

- **President:** Vera Beck
- **President-Elect:** [Olena Kit](#)
- **Secretary:** [Donna Molloy](#)
- **Treasurer:** [Andrea Knecht](#)
- **Communications Director:** [Marlena Muskens](#)
- **Membership Director:** Kelsey Laye
- **Members at Large:** [Nicholas Fonseca](#) and [Rick Stirling](#)

We are also currently accepting nominations for our Board. If you are interested, please reach out to our Secretary at secretary@armaedmonton.org.

SAVE THE DATE!

We have scheduled our Annual General Meeting (AGM) for June 13th, 2023, at noon. There will be an introduction to our new board and volunteers and a summary of the results of the Membership Needs Assessment survey. There will also be an exciting Information Governance (IG) presentation. This speedy 15-minute presentation will cover the history of IG, the vision of what it was meant to be, where we are now, and how to get your IGP certification from ARMA. It will be presented by Rick Stirling of IMCanadaConnect.

The AGM will be held virtually over Zoom. We will send out the Zoom link to your email in advance.

E-DISCOVERY EDUCATION: THE HANDFUL OF THINGS YOU MUST GET RIGHT

By Mike Quartararo

No matter where you are in the legal world, at each stage of any e-discovery project, there are a handful of things you need to get right to have a successful outcome. Clients of course want to save money, but a successful outcome can sometimes be more valuable than money.

What is a successful outcome? For most litigators, it means that a sound, defensible process contributed to the desired result for the client. Let us review briefly, in summary form, the handful of things that need to happen in every case—the things you simply need to get right on each project.

IDENTIFICATION AND PRESERVATION:

- Formulate a plan
- Identify the custodians
- Identify sources/systems containing relevant electronically stored information (ESI)
- Implement a legal hold
- Adjust retention policies to preserve ESI across necessary systems

It is not enough to just issue a legal hold notice. Organizations must take affirmative steps to preserve ESI in place (as some systems allow) or by physically segregating ESI.

COLLECTION OF ESI:

- Plan the collection with the legal team, client and information technology (IT) representatives
- Prepare a collection specification to identify what ESI is being collected
- Use industry standard tools for collection and write-protecting to protect metadata
- Validate the collection through file hashing
- Document the collection using an acquisition report and chain of custody

Remember, without the proper tools and solid documentation, the legal team may later have difficulty getting materials admitted into evidence.

PROCESSING OF ESI:

- Perform early data assessment/reporting to understand the ESI
- Develop a processing specification, including

- Culling techniques (keyword search, file type, date filtering)
- [De-NIST](#) the ESI
- De-duplicate the ESI
- Consider the format of the deliverable
- Perform quality control and prepare an exception report

And if the project involves multiple rounds of processing, keep in mind that tools should remain consistent across data sets.

DOCUMENT REVIEW AND ANALYSIS:

- Plan the review
- Prepare a review memorandum or protocol
- Train the review team (not just on the platform, but in the case itself)
- Monitor reviewer progress
- Conduct quality control checks
- Communicate!

A lot is learned during document review. It is important to capture that information so it may be used strategically and tactically by the legal team during the case.

PRODUCTION OF ESI:

- Plan the production
- Prepare a production specification (form of production)
- Conduct quality control checks

Remember, it is critical to check for inconsistent document coding, ensure images, files and load files are functional, and if documents have been redacted, that searchable text or optical character recognition (OCR) has also been redacted.

CONCLUSION

The success of an e-discovery project is dependent upon the ability of each of the stakeholders throughout the five stages above to contribute to a defensible process. Managing a budget and meeting deadlines are important, but having a sound process or workflow is going to help to manage not only the risks associated with e-discovery, but also consistently lead to successful outcomes for clients.

NEW VOLUNTEER INTRODUCTION

We would like to introduce our new volunteer, [Indika Dasanayaka](#)! He will be volunteering for the ARMA Edmonton Chapter as Social Media Coordinator and Newsletter Editor.

Indika previously worked as a librarian for nine years in Sri Lanka. He started out working for the Sri Lankan government. In 2010, he immigrated to Canada and worked outside the library field to get some Canadian work experience. However, he dreamed of returning to his career path in libraries. He eventually made his way back to the field through volunteering at the Edmonton Public Library (EPL). He also volunteered at the Royal Alexandra Hospital as a resource centre assistant.

Then, in 2021, he started the Library and Information Technology (LIT) program at MacEwan University. He completed the program in June 2023.

Indika is looking forward to serving the ARMA Edmonton Chapter and supporting our organization's future success! We are excited to have him on board.

DID YOU KNOW?

The information management industry has long distinguished between “data” and “information.” Data was structured; it was anything living in a database. That was someone else’s problem to manage. Information was unstructured, and that was our responsibility.

A recent [study conducted by the Association for Intelligent Information Management \(AIIM\)](#) found that these two worlds were starting to collide. In fact, 38% of organizations surveyed did not differentiate between “information” and “data.” What is more, is that the organizations that did not make that distinction saw higher levels of alignment with the business and support from executives.

You can read more about this study at the link provided.

CALL FOR ARTICLES

We would like to thank [Mike Quartararo](#) from the [Association of E-Discovery Specialists \(ACEES\)](#) and [Tony Paille](#) from [AIIM](#) for their contributions to this issue of *The ARMAyeg Connector*.

We are now in the process of planning Volume 5 of *The ARMAyeg Connector*. If you have specific requests for RIM trends or topics that you would like us to cover, or if you would like to write an article for our newsletter, please submit your suggestions and/or articles to our Newsletter Editor:

Indika Dasanayaka
dasanayakagamagei@mymacewan.ca

THE NEXT DIMENSION OF INFORMATION MANAGEMENT IS DECIDEDLY CUSTOMER-CENTERED

By Tony Paille

Back in 2017, the Association for Intelligent Information Management (AIIM) gathered its Leadership Council in workshops designed to collectively define and articulate what our industry means by Digital Transformation. We concluded that the need to understand, anticipate, and redefine internal and external customer expectations was at the heart of every Digital Transformation journey. Research conducted by Forbes in the following year affirmed our work and our conclusions, adding that true Digital Transformation leaders are those that make it EASY to do business with.

In tapping into the end-user community, we found impressive examples of that philosophy at work in leading organizations like Farmers Insurance, Ogilvy, and United Health Group. These organizations had already realized what the Forbes concept of EASY meant: they must enhance or simplify our customers’ lives and that we must be able to deliver those products in the way that our customers want to consume them.

Despite customer experience being viewed as the endgame of Digital Transformation, many have found it understandably difficult to make the paradigm shift to customer-centered information management. A strategy centered around risk, compliance, and governance for governance’s sake is familiar and comfortable, but it fails to move the organization closer to its goals.

For those who feel this way, our advice is to start small and look for immediate, incremental wins. [Our research](#) suggests these are among the most effective ways you can leverage customer-centric Intelligent Information Management capabilities to make a significant impact:

1. Map all of the key customer touchpoints to identify process improvement opportunities
2. Work closely with your internal customers to ensure the information they need to do their jobs is accurate and accessible
3. Invest some time in becoming more data literate to help the business extract meaning from myriad data sources

By becoming the authority in one or more of these business activities and solving real issues that your internal and external customers struggle with, you will create an indispensable role for yourself in moving the organization closer to its goals.

The next dimension of Information Management is decidedly customer-centered. Are you ready?