January 2014

ARMA International San Antonio Chapter

Collaborator

Navigating RIMs Rough Waters

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JANUARY MEETING

Tuesday Jan. 21, 2014 * Embassy Suites Hotel Briaridge

11:00 am—1:00 pm

The Information Management Framework and ECM Initiative at Valero

Jayne Bellyk, CRM, CIP; Ashley McKay, CRM; and Steve DiPaola - Valero

Jayne is the Manager of the Records and Information Management Program at Valero with twenty years of experience advocating and implementing RIM polices and practices for very large companies such as Ford Motor Company and Chevron Phillips. She holds a graduate degree in Information Study from the University of British Columbia. Ashley has had a 15 year career as an information professional as a technical librarian, a research librarian, and an assistant archivist. She has been working for Valero in RIM since 2007 implementing an email management program, consolidating legacy instant messaging systems, creating an in-house e-discovery program, and chairing the Information Governance Committee. Steve is Director I/S Servics at Valero responsible for the Infrastructure Services Support Department, which includes Records and Information Management functions. With over 27 years experience in Information Systems, Steve is blending strong records management expertise with sound technical concepts to raise Valero's capabilities in content and electronic records management.

Price includes luncheon and program: Members pre-registering online by noon on Friday, Jan. 17 $25
Members not pre-registering $30
Non-Members $30

Register Online at www.ARMASanAntonio.org**.**

Payments may be made online (credit card only) or at the door (check, cash, or credit card).

From the President

Happy New Year!

Your San Antonio ARMA chapter has a lot of great educational sessions and events planned this year. This month our friends from Valero will be sharing about their ECM implementation at the educational luncheon. Please come out and learn about one of the best RIM programs in San Antonio. A special thanks to OpenText for sponsoring the January luncheon!

If you haven't done so already, I would like to encourage you to register for our February seminar. The early bird rate of $99 will be expiring soon. The topic is on Managing Records in Today's Social and Mobile Society. As a RIM professional it is important that you learn how to expand your program to accommodate new trends like these.

I hope you have a productive and prosperous new year!

Clint

Clint Wentworth, CRM
President, ARMA San Antonio Chapter

Thank You to

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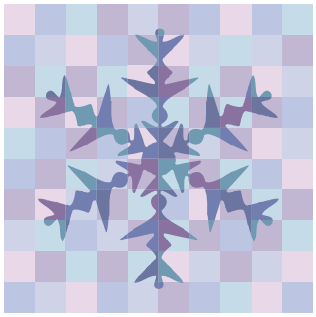
for sponsoring our January luncheon meeting.

We Appreciate Your Support!



Don't forget to register for the February Seminar!

See the brochure on page 12.

Tips for Scheduling Potentially Permanent Records Part 2

(The following information was derived from a series of publications produced by the National Archives and Records Administration as guidelines for federal agencies with permanent electronic records. It has been adapted by the editor to be more generic towards all types of organizations and to combine the 6 brochures into one by removing duplication. The original brochures may be found at http://www.archives.gov/publications/records-mgmt.html#pamphlet and may be downloaded and reproduced as needed. Thank you to Melissa Wallis for information on these brochures.)

What kind of information is needed to appraise electronic records for permanent retention? January's article covered e-mail messages, PDF files, and digital photographic records. This month continues with scanned images, geospatial data records, and web content.

Scanned Images of Textual Records

What additional information is needed for scanned images of textual records?
Image construction information

- Pixels per inch (ppi), bit depth, color/tonal information
- Image enhancements routinely used (e.g., contrast adjustment, de-speckling)
- Compression schemes used

Metadata information

- Structure of the file header (e.g., standard TIFF, proprietary)
- Structure and content of embedded metadata, aside from header information
- Use of Optical Character Recognition (OCR) and how linked to the images

⇒ For agency created images, contact the business unit that created the scanned images and identify scanning standards or procedures used.

⇒ If the images were created by external sources or if available information is limited, you can identify technical image construction information by:
  – Opening the scanned images and evaluating their file properties,
  – Using batch software to evaluate the technical attributes of the files, and/or
  – Examining scanning station(s) to determine the software settings used.

Digital Geospatial Data Records

What additional information is needed for digital geospatial data records?
Data compilation information

Describe any in-house Geographic Information Systems (GIS) "library" or centralized data store maintained by the Agency.

Continued on page 5

Tips for Scheduling, continued from page 4

Data construction information

- Explain if the data is in SDTS or any other recognized open standard formats as opposed to fixed views or formats.
- Identify if any of the data layers are created by other sources. If so, identify any restrictions that might prevent their transfer to, or use by, your agency (e.g., legal, copyright).
- Identify any of the data layers that consist of static or general information which is not updated by the agency.
- Verify that GIS records exist in the system, in lieu of the system merely serving as a portal to data that resides outside the agency.
- Identify any of the data layers that consist of dynamic information and how often significant changes are made to the data layer(s) by the agency.
- Identify any compression methods applied to components of the GIS system.
- Identify any documentation describing the structure and content of the GIS records available from either the agency or a standards body.

⇒ CGIS experts who use the systems on a daily basis can provide technical information needed to evaluate these records.

Web Content Records

What additional information is needed for web content records?

General web site information

- The name and URL of the web site being scheduled
- The filename of the first page (or "home page") in the URL
- A copy of the "site map"
- Describe how frequently the content is updated. Explain if the proposed schedule contains adequate cut off instructions.

Web site construction information

- Explain whether the files on the proposed web schedule reside in the same domain.
- Identify external links significant to the appraised value of the web content.
- Identify whether the web content uses anything (e.g., cookies, robot.txt files) that could cause differences between the content that is viewed during the appraisal process and the content that is ultimately transferred.
- Identify any portions of the web site maintained separately in other formats and if they've been scheduled.

Transfer information

- Explain how the web site can be prepared for transfer to your organization.
- Describe the method(s) that can be used to collect the web content (i.e., automated harvest, PDF capture, or manual capture).
- Identify if all links within the web content can be redirected for transfer to another site so that they continue to navigate within the web site.
- Identify if the external links can be disabled.
- Identify if the destination of significant links can be either commented within the HTML or described in the transfer documentation.

⇒ Typically the site webmaster and the IT staff responsible for maintaining the hardware and software for the web site can assist in gathering technical information required to evaluate web sites.

How to Get from 1998 Style Records Management to Information Governance for 2018

By Richard Medina

(Richard Medina is co-founder and a Principal Consultant at ***doculabs.com****. This article first appeared on the CMS Wire website and is reprinted with permission. Thank you to Susan Rickman for sending in this article.)*

Are you still struggling with the records management problems of 1998? You're not alone.

Here are what we might call 2013 and 2018 information governance problems:

1. **The digital landfill problem.** *We have 50, or 100, or 1,000 TBs of documents all over the place in our various systems. How do we sort through it all and responsibly retain or dispose appropriately within our budget constraints?*

2. **The "systems of engagement" problem.** *How do we do information governance on our dynamic, sometimes chaotic "systems of engagement"?* So our problem has three parts:

    a. How do we meet our governance obligations with our internal use of systems of engagement which we use for collaboration, interactive community building, etc.?
    b. How do we meet our obligations with our use of external SOE beyond the firewall, with customers, vendors and the public?
    c. How do we meet our obligations in how we're integrating our evolving SOE into our more mature systems of record, which help to run our core line of business processes?

3. The discovery problem. *How do we prepare for and respond to litigation and other discovery, given #1 and #2 above?* Most of our current information governance technologies and best practices aren't up to addressing these 2013 and 2018 challenges.

These were some of the big problems back in 1998 for electronic RM. If you were around back then, think about what electronic RM problems you wanted to tackle. They probably included:

1. *Managing the electronic analogues of the documents your paper RM program had been managing.* These were the high value, high risk, highly manageable documents you were already managing in paper according to your retention schedule.
2. *Managing the electronic documents, some of which were records, that were authored or modified by knowledge workers using MS Office and email.*
3. *Managing electronic documents that were of lesser value, risk and manageability than #1 above, or were of possibly high value and risk — but were mixed in with a lot of lower value and risk documents.* So part of the challenge was sorting the haystack.
4. *Managing email, particularly the email messages and attachments that qualified as records, being of high value and risk.*

These are all 1998 RM problems. They all increased in magnitude by 2003 — with more records, desktop-authored documents, junky documents, and email — and there were some additional problems.

3 Ways to Get Beyond 1998

Here are 3 ways — ***dare we call them "best practices"?*** — to help you get beyond 1998 in RM and information governance, so you can address the information governance and discovery challenges associated with 2013 and beyond, particularly the digital landfill and systems of engagement.

Continued on page 7

#1. Be clear about what problems any "Best Practices" were designed to solve and were actually successful in solving.

For a first approximation, we might divide history into five problem periods:

- **Pre-1998** (predominately paper RM)
- **1998** (the four problems I outline above; also "EDMS")
- **2003** (the magnification of the four problems, plus the internet; also "ECM")
- **2013** (the magnification again of the preceding, plus the explosion of "Systems of Engagement" and the digital landfill)
- **2018** (the magnification of the preceding, plus expected and surprising disruptions).

Now ask three questions of any information governance "Best Practice" you consider:

1. Which RM problems, from which periods, was it designed to address?
2. How successful was it in addressing those problems?
3. Under what conditions was it successful?

Most RM "Best Practices" you assess were probably designed for different problems than the ones you want to address, or weren't really successful when implemented, or were successful but under different conditions than the ones you face.

There's little empirical evaluation of "Best Practices" in any field, let alone rapidly developing areas of IT and information governance. So the "Best Practices" are often primarily the ones that have been most successful in reproducing themselves. None of this means that you shouldn't follow them. They may be the best practices you can get. But you should try to be clear about the limits of their applicability and how best to use them.

#2. Recognize that every option worth considering has Pros and lots of Cons.

The norm is that few options are excellent, even if executed flawlessly, and no options in ECM or RM are executed flawlessly. There are always deviations from the roadmap and compromises. So your decision making has to be subtle.

You are deciding among options the best of which is good but not great. Or you are choosing the least bad option. Or you should choose the option that looks pretty weak if all were to go 100% as planned — but is the best option if you take into account the risk and cost of the initiative deviating from the plan.

Therefore, downsides or Cons to an option are relevant and often important — but they should not kill the option. Objections are just line items in the "Cons" column of your evaluation, to be weighed first against the Pros and then against all the other contending options.

#3. Be pragmatic.

Define your RM initiative objectives — your ends — so that they meet your organization's needs and they are achievable. Achievability means that you probably have to reduce the scope from what you might accomplish if you had less restrictive budget constraints, less likelihood of initiative failure, with less negative impact from such failure.

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Continued from page 7

Here's an example. Records management includes both managing a retention schedule policy and executing (or "enforcing" or "fulfilling") it. Execution today involves doing classification, retention and disposition of the files in a number of ECM systems and other repositories in the organization. That's a 1998 problem that folks are still wrestling with.

But today in large organizations, with tens of independent business units, often across several countries and involving hundreds of repositories, both policy management and policy execution are very complex endeavors. It's likely that if such organizations tried to tackle both policy management and policy execution, they would fail at both. So a strategy based on achievability might focus first on policy management (perhaps using a simple spreadsheet or a glorified spreadsheet application from IBM/PSS or RSD), and then incrementally address policy execution.

Being pragmatic means that you should be creative and rigorous. When you weigh your alternatives' Pros and Cons, a solution that gets you only 80% of what you want but that can be almost certainly executed beats the solution that gets you 100% of what you want — but has a significant risk of project failure and big negative impact when it does.
The moral of this point is to clearly understand how complex and thus risky your initiative is, and err on the side of simpler and safer initiatives. Plan your initiative so you can withstand serious and arbitrary delays or deviations and still declare victory.

Finally, being pragmatic does not mean being shoddy, either by solving the problem at hand in a way that hinders other initiatives or the "big picture," or by neglecting compliance obligations, or by accepting too much risk. Being pragmatic means assessing these three issues and ensuring that they constrain your approach. Then be creative and rigorous in how you develop and assess your options to achieve your RM objectives.

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Key Terms in E-Discovery

(Reprinted with permission from Avansic. Thank you to Melissa Wallis for sending this information. The original webpage may be found at http://www.avansic.com/Resources/KeyTerms/)

The digital world is known for acronyms and jargon, which can be overwhelming for non-technology based vocabularies. To help navigate the technology speak, Avansic E-Discovery & Digital Forensics created the following list of key terms.

BYOD - Otherwise known as "Bring Your Own Device." A use policy that some companies and firms are adopting that allows users to select their electronic devices (ie, iPhones and iPads).

Clawback - Clawback is a method of data exchange suggested by the Federal Rules of Civil Procedure in which one party releases data to another party without relinquishing the right to later declare items or documents within as privileged. In practice, clawback is best performed using a third party intermediary.

Clustering - Grouping documents based on unsupervised machine learning. Some also call this advanced analytics, technology assisted review, and predictive coding.

Culling - Culling is the process of removing clearly non-responsive items from a data set; for example, removing junk mail or de-NISTing the contents of a hard drive. Culling is a high level process that seeks to reduce a data set by removing the most obviously unimportant items.

Data Carving - Data carving is the process of examining a computer's slack and free space to try and discover any relevant file artifacts.

De-Duplication (or "deduping") - De-duplication is the process of removing duplicate files. A different process of de-duplication is typically used for files and email.

De-NISTing - De-NISTing is the process of removing commonly found files on computers that involve the machine's internal operations. This is a common step performed to reduce a data set during ESI processing. There are many lists of known files available; the most commonly used is the National Software Reference Library from NIST. This is also called "Known File Filtering" or "KFF".

Digital Forensics - Digital forensics involves the investigation of a data set that includes hidden or deleted information on computers, cell phones and other electronic devices. This is a focused approach to finding data that yields a targeted and relevant data set.

Early Case Assessment - Early case assessment is a process to help determine the devices and information relevant to a particular case. This is a way to reduce the cost of e-discovery from the early stages. Avansic provides each customer with a Project Manager to consult for this type of assessment.

E-Discovery - E-discovery is a broad approach that works to filter and convert data into a reduced set of usable documents for attorney review. It generally includes all active files on a computer hard drive.

En Camera - Set of documents containing all privileged documents, as well as the privilege log, and when documents are being produced during the course of litigation.

ESI (Electronically Stored Information) - Electronically Stored Information is any information stored on a digital device or on digital media. This term is commonly used in the e-discovery industry.

ESI Processing - ESI processing is a general term that typically applies to any the filtering, searching, and de-duplication stage of e-discovery. Both digital forensics and e-discovery

Continued on page 10

Key Terms, *continued from page 9*

Filtering - Filtering is the stage of ESI Processing where the data set is reduced by keywords, date restrictions, custodians, or phrases.

Forensic Examiner - A forensics examiner is a professional trained in recovering digital information for legal or investigative purposes.

Forensics Copy (Image) - A forensics copy or image is a special copy of a hard drive taken by a forensics specialist that duplicates every single piece of information, written as 0s and 1s, on the hard drive. This special copy ensures that all of the information on the drive can be investigated, including deleted files.

Hard Drive - A hard drive is the part of a computer that contains all programs, documents and the operating system. This is the device that is copied during a forensics collection. Hard drives can also be contained within other electronic devices, including iPods.

Hash - A hash value is a small digital fingerprint of data commonly used to test if data has been altered. Common hashes include MD5 and SHA.

Indexing - Indexing is a term used to describe the preparation of data to be searched. Similar to the index in the back of a textbook, this process allows quick and ready searching of the entire electronic device. For other searching techniques, the addition of a keyword or term requires a search of the entire drive again.

Information Security/Information Assurance - The practice of protecting, detecting and preventing information systems from unauthorized and potentially harmful events.

Internet History - Internet history is a computer's record of which Web sites have been visited. The specific information will depend on which browser was used and the settings for that browser.

Loadfile - A loadfile is a file used to import data into a software program. The most common loadfiles are destined for Summation and Concordance. A Concordance load file (also called a .dat or .opt file) is nothing more than a sophisticated spreadsheet with rows and columns. A Summation loadfile is a text file with a list of items. Loadfiles contain information that directs the program how to handle data.

Metadata - Metadata is "data about data", which refers to information captured about a document that isn't necessarily viewable; this may include access dates, formatting changes, save locations, and users of a document.

Native File - A native file is a file produced in the same form in which it was created and stored. For instance, a Word document that is produced as .doc file or an Excel file that is produced as .xls file is a native file.

Online Review - The process of reviewing documents using electronic tools and electronic document repositories. Tools typically allow the user to collaborate on a project, tagging, sorting and organizing documents.

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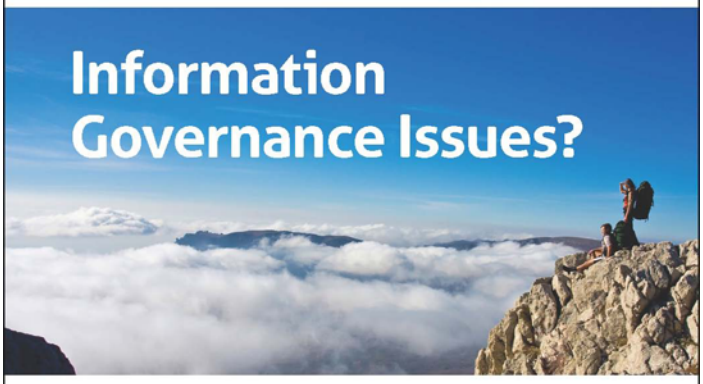

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Visit OpenText, a proud sponsor of the ARMA San Antonio Texas chapter, to find out how we can help.

Continued on page 11

Key Terms, continued from page 10

Privilege Log - When documents are held back from being produced due to privileged content, such as attorney-client or doctor-patient communications, a privilege log is kept of the specific documents and the reason for their exclusion. This log is produced to the opposing counsel and to the judge for the case.

Predictive Coding - Uses training sets and supervised machine learning to assign a document into a particular category. There are a variety of tools and workflows available to facilitiate this process.

Production - Production is the release of documents requested by the other party's attorneys during litigation. Production can also include the release of documents from a digital forensics or electronic discovery firm to clients, generally in the form of a CD or DVD.

PST, OST (Mail Store) - If Microsoft Outlook is used as the e-mail program, e-mails are stored in a single file with the extensions ".pst" or ".ost."

Redaction - Redaction is removing sensitive information from a document or document set before release to either the opposing party or to the public. It is common to redact privileged information from a production set before turning it over to the opposing party. Another example of redaction is removing classified information from government documents before making them publicly available.

Server (File or Email) - A server is a computer used to allow general access to commonly used files and software through a network. Servers have much more storage and processing capacity than desktop computers.

Slack/Free Space - Slack and free space is the unused space on a hard drive that contains leftover and deleted information. A digital forensics image of a hard drive captures this information, which allows forensics professionals to piece together deleted files.

TIFF, JPG, PDF files - These are common file types for electronic document production. .TIFF and .JPG file types are image files, and .PDF is a document file that is generally used to transfer content that the user does not wish to be changed. PDF files appear the same regardless of the computer's operating system.

Bald cypress trees on the banks of the Guadalupe River in Guadalupe River State Park.
Photograph by Larry D. Moore in Wikipedia article
http://en.wikipedia.org/wiki/Guadalupe_River_State_Park .

Employment Opportunity

Administrative Support Specialist (Lead Records Coordinator) Job; Colleyville, TX

(Note: This position was still advertised when last checked on 12/12/2013.)

Colleyville is located in the Dallas Fort Worth Metroplex area of North Texas. The city was recently named the #1 Safest City in Texas by Safewise.com. Our department has 40 sworn officers and 6 civilian staff. We are currently transitioning our records department to electronic medium via Laserfiche scanning. The Lead Records Coordinator will have a vital role in this project and the opportunity to determine the future of the department. Interested candidates should refer to this hyper-link: http://www.colleyville.com/job.php?id=109 or contact David Martz with any questions.

Job Description
POSITION TITLE: Administrative Support Specialist (Lead Records Coordinator)
DEPARTMENT: Police APPLICATION DEADLINE: Open Until Filled

SUMMARY OF POSITION: Provide advanced administrative support services requiring a broad knowledge of designated specific functions. Responsibilities, as assigned, may include providing customer service; preparing reports; providing direct assistance to management; preparing documents; staffing special projects; tracking budgets and expenditures; developing project timelines and maintaining schedules; and coordinating events. Performs advanced office duties; organizes and maintains records; and prepares regulatory and other reports. (See post for detailed list of primary duties.)

For more information, including minimum requirements, see: http://www.colleyville.com/job.php?id=109

Rocky Mountain Juniper tree with berries, as found in Texas. Picture from Wikipedia with permission from the US Dept. of Agriculture

Educational Opportunities

ERM Software: Historic Timeline, Lessons Learned, Current Issues, Future Focus

ARMA International MER Session of the Month for January

ERM Software pioneer Bruce Miller believes we have failed to realize the promise of ERM software. From an Introspective examination of ERM software history, better understand a) current challenges and b) what must be done to meet future expectations. Bruce then explores "what's next" and concludes with a roadmap for a more successful ERM software future.

To view the session:

1. Visit the ARMA International website.
2. Log into your "My ARMA" account
3. Click on the link in the chapter membership section.

Then begin enjoying the session. As a reminder, these sessions are only available during the month that they are selected. To view them outside of these date ranges purchase will be required.

The ARMA San Antonio Collaborator

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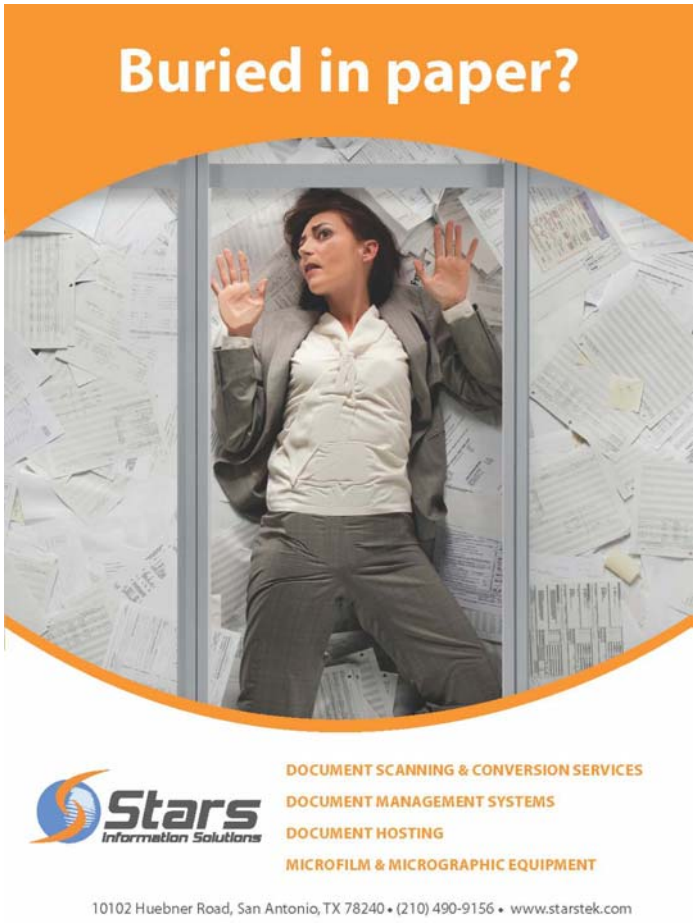


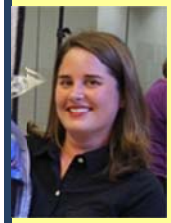
Calendar of Events 2013-2014 ARMA San Antonio

"Navigating RIMs Rough Waters"

September 17, 2013
John Rhoades – Access Sciences

Email Management Leading Practices

October 15, 2013
Angela Ossar – Texas State Library and Archives Commission



Digital Preservation, Fragility of Digital Information, and Preservation Methods

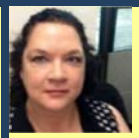
November 12, 2013
James Gilbert – Polygon US Corporation

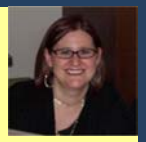
Disaster Recovery and Document Restoration

December 10, 2013
David Culbertson - AmeriTex

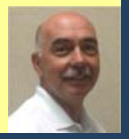
The New Realities of Proper Information Destruction

January 21, 2014
Jayne Bellyk, Ashley McKay, and Steve DiPaola – Valero





Information Management Framework and ECM Initiative at Valero



"Managing Records in Today's Social & Mobile Society"
February 21, 2014
Educational Seminar
Benjamin Wright – Speaker
Embassy Suites Hotel Briaridge

March 18, 2014
Ed Olszanowski PMP – HVHC Inc.

Business Process Analysis

April 15, 2014
Anna Stratton – Southwest Solutions Group

Building a Case for Digital Migration

May 13, 2014
Leticia Vacek – City of San Antonio

Communications: Archiving Your History

June 17, 2014
Pedro Mercado

Leadership

Put your Sea Legs Away and Join Us for ARMA San Antonio's Fall Social Event
November 8, 2013
Dance lessons
Studio One Dance Center
9055 West Ave Suite 111
Time: 8-10 PM **Cost**: $12/person

Benjamin Wright

Mr. Wright teaches the Law of Data Security and Investigations at the SANS Institute, the premier educator for IT Professionals. He is the author of several technology law books, including *Business Law and Computer Security (published by the SANS Institute).* With over 25 years in private law practice, he has advised many organizations, large and small, private sector and public sector, on privacy, computer security, e-mail discovery and records management. He maintains a matrix of popular blogs accessible at benjaminwright.us. Mr. Wright's blogs, videos, tweets, web comments and the like constitute the online update service for the book *The Law of Electronic Commerce*. Originally released in 1991, and revised continually since then, the book is a reference for lawyers, published by Wolters Kluwer Law and Business. Wright has been quoted in publications around the globe, from the Wall Street Journal to the Sydney Morning Herald. Mr. Wright graduated from Georgetown University Law Center in 1984.

IPAD DRAWING GIVE-A-WAY SPONSORED BY:

OPENTEXT

Registration:

EARLY BIRD*REGISTRATION $99 (on or before January 31, 2014). *REGISTRATION $119/after January 31, 2014) .

Upon *registration you will be entered for an IPAD drawing give-a-away—MUST BE PRESENT TO WIN!

ONLINE REGISTRATION: www.armasanatonio.org

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ARMA
San Antonio Chapter

Early Bird Registration —SAVE $$
$99 (on or before January 31, 2014) Breakfast & Lunch included w/registration

ANNUAL SEMINAR

Friday, February 21, 2014

8am-4:30pm

Managing Records in Today's Social and Mobile Society

Embassy Suites*

7550 Briaridge, San Antonio, TX 78230

***$124/night Embassy Room Rate**

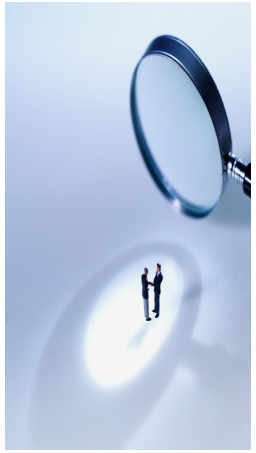
ARMA INTERNATIONAL
SAN ANTONIO CHAPTER
P.O. Box 18331
San Antonio, TX 78218
Email: sanantonioarma@gmail.com

Registration 7:30am-8:30am

Continental *Breakfast 7:30am-8:30am
(*included w/registration)

Welcome & Opening Remarks 8:30am-8:45am

8:45am-10:15am
Social Media as Records and Evidence for Business, Lawsuits, and Investigations, including Human Resources Investigations.



Social networks, like Facebook and Twitter, are the focus of many official investigations, including those conducted by education institutions and by state and local governments. The networks are bursting with evidence relevant to disputes, lawsuits, tax audits, regulatory compliance and many other inquiries. But intrusive investigations into these networks raise practical, privacy, and confidentiality issues. In this presentation, you will learn the details of and lessons from recent cases, involving such diverse topic areas as regulatory inquiries, police investigations, and employment disputes. You will learn the risks that any kind of investigator faces in social media, as well as, methods to manage that risk. Mr. Wright will share tips for evidence collection so it is more likely to be accepted and believed as evidence in court or in other official proceedings.

10:45am-12:00pm

Mobile Devices: Legal Evidence, Record Retention, and Policy on Bringing Your Own Device (BYOD) to the Workplace.

Mobile devices like laptops, tablets, and smartphones have rapidly grown more powerful and affordable. Employees are tempted to use their own personal devices—as well as their own online services such as webmail—for official business. Some employers subsidize employees to use their own devices. But BYOD raises thorny issues regarding evidence, control of records and replication of records. This presentation will consider how to craft BYOD policy for the workplace, including example language for a BYOD policy.

***Lunch & Networking 12pm-1pm**
(*Included w/registration)

1:00pm-2:15pm

Data Security: Trends and Controversies in the Law, Including the Problems with Drafting Realistic Policies and the Challenges Posed by Mobile Devices Owned by Employees.

Law and public policy increasingly expect enterprises to ensure individual privacy and to secure personally identifiable information, such as credit card data and social security numbers. But as technology changes ever-more rapidly, drafting and implementing realistic privacy and security policies in becoming more difficult. This presentation will examine recent cases, including some involving mobile devices, and consider practical policies an enterprise can adopt to promote compliance with law and reduce risks associated with data security breaches. Lessons from this presentation will be applicable to nonprofits, private corporations and government agencies alike.

2:45pm-4:00pm Professional Ethics in the Age of Technology and "Big Data"

Technology motivates all professionals and all enterprises to think more carefully about compliance with law and ethical principles. Owing to technology like smartphones and the Internet, the quantity of records about our behavior are far more numerous and more searchable than was true even a decade ago. Society is using these records to hold us as individuals and the organizations who employ us to higher standards of accountability. Mr. Wright will consider case examples of technology being used to impose legal and ethical compliance. He will offer tips on how to stay out of trouble in this rapidly changing age of technology.

4:00-4:30

- **IPAD Drawing Give-A-Way—*Must be present to win***
- **Other Vendor Give-A-Way Drawings**
- **Closing Remarks**