Washington Records and Information Managers (WARIM)
Forum Notes
February 18, 2020

Please note the use of word "agency" refers to agency, board, or commission.

Ice breaker
What's something you want to do in the next year that you've never done before?

Buy property	Sleep in	Take a honeymoon
Enjoy being a grandmother	Build a farm table	Be fully staffed at the office
Go zip lining	Purchase first house	Travel solo
Learn Spanish	Create and design escape room	Take kids camping
Watch kids' sporting activities	Travel – Ireland, Italy, Hawaii, Washington state, Lake Chelan	

Subcommittees Updates
Professional Development Subcommittee
Which professional association(s) should a Records Officer join?

     If you work at state level - ARMA   NAGARA   AIIM

     If you are getting certified as a Records Analyst or Manger - ICRM

     If you work at city or county level – MRSC   If you work in law enforcement – LEIRA

Which professional association(s) should a Public Disclosure Officer join?

     Regardless of level - WA-PRO

Please see full listing (and links) at [RIM-related associations and organizations](#).

Your agency might pay for your professional association membership.

Some associations offer free webinars if you are a member.

     If you are not a member, to view webinars, you could -

       Ask your agency to pay for the webinar out of training funds.

     Seek out a member and ask them to schedule time to watch the webinar with you.

     SOS will try to let folks know about webinar viewing at their conference room.

       This will depend on staffing and workload so last minute cancellations might occur.

For future meetings, it would be helpful if a member from each subcommittee would brief the group on their activities/projects, upcoming events, etc.

Our subcommittees are –

- Website and Communications

Purpose: Improve communications between members, including website.

- Professional Development Subcommittee

Purpose: Report out and keep members informed of actions, events, and obtain training for forum or other events, obtain certification, etc.

- Legislation and Policy

Purpose: Watch and report out on bills and other actions that pertain to records management and public disclosure to keep members informed.

Discussion - Electronic Signatures

Fish and Wildlife has an electronic records policy in the works.

Recreation and Conservation Office has a policy in place.

They use Abode Sign signature for contracts.

Please note they are beta testers for the state and this is not a currently approved vendor.

SOS informed us that they have a site dedicated to electronic/digital signatures.

Electronic signature policies must be reviewed by Dept of Enterprise Services and posted on the OCIO site.

OCIO has electronic signature guidelines.

OCIO only has one approved vendor – DocuSign.

Various polices can be shared on WARIM site.

Escape Room

Jaime Ganzel, SOS, showed a demo of records management escape room game.

She is putting the final touches on the game and will be able to send it out for agencies to use.

She needs conference rooms to host escape room game.

Logistics prevented from having the event in the Archives building.

If you can host an escape room event, please email Jaime.

RIM Month

Proclamation has been submitted to Governor for signature.

Tours at State Library, State Records Center, and Archives have been set up by SOS.

Tours are posted on the training calendar.

Ideas for RIM Month:

All staff emails with tips.

Shred day.

April 22 - RIM awareness fair

Booths will be hosted by business partners, SOS, library, AGO, WATech, local vendors, etc.

Free ARMA meet and greet.

This year's location will be at L & I.

Flyer for flyer will come out soon.

Good for the order

SB 5504 - Concerning state agency employee access to peer-reviewed journals, is currently in session.

This bill directs a study to allow staff access to current peer-review articles and journals subscription. Best available science approach.

New information can help prevent hoarding of old info/data.

<p style="text-align:center">Assistance from the group</p>

Searching Office 365

You will need G5 licenses instead of G3 to search whole agency for records.

Office 365 topics

[WATech is the lead for Office365](#) (they are owners of the tenants).

Office 365 instruction/demos will happen at future WARIM Forum meetings.

Topics include –

Searching and public disclosure officers

Who to search? What to do with results? Work-arounds?

E-discovery?

What to do with exports of record searches?

Retention practices and policies.

Email retention labels.

Definitions/terminology.

How do you get on the User group? Contact Jason Beers at WATech.

There are Office 365 user groups but it's hard to understand which group you should belong.

Please note this email came in after our meeting. Office 365 subject matter experts from WATech will be invited to our future meetings.

1. Additional licensing is required for basic daily functions; i.e. collecting, storing, sharing, sorting, purging ect of records has now been eliminated without the need of an agency to purchase additional individual licenses The current functionality in the Microsoft eDiscovery 1.0 toolset is equivalent to the current Exchange multi-mailbox search. Exchange admins and records officers should be familiar with this current feature. Microsoft has stated that eDiscovery 2.0, sometimes referred to as Advanced eDiscovery, will be available in Government tenants by June 2020. Advanced eDiscovery functionality improves significantly and we're looking forward to the rollout of this product. Our understanding from Microsoft is that the Advanced eDiscovery requires a G5 level license.

2. None of the state agency's Records Coordinators were invited to attend any of the M365 "discussions" prior to implementation. The concern here is with the ability for the coordinators to bring to the table the Records Retention component. There are multiple avenues of communication whereby records coordinators can learn about the Shared Tenant. Monthly Discovery Accelerator Users Group (DAUG), monthly Cloud Enablement Advisory Committee (CEAC), monthly Enterprise Active Directory (EAD) Steering Committee, and monthly O365 Users Group have all discussed frequently and openly about records, archiving, toolsets, and plans. Additionally, customers can sign up for "alerts and updates" from our WaTech home page watech.wa.gov

3. Are there any trainings that can be scheduled or offered solely on Records retention? My understanding for the RC's today is that agencies have had to purchase various add-ons in order to stay in compliance. Ie FAST, Polaris WaTech is working with Epiq, a third party vendor, who is conversant in both Enterprise Vault and O365 to learn more about Advanced eDiscovery and potential training opportunities. If possible, and once details can be arranged, future training possibilities may become available.

4. Can you send me the name and contact info for the person in charge of the user/user advisory group, if there is one, for state agencies?

> DA User group – Jason Beers and/or Angie Sherrer
> CEAC – Angie Sherrer and/or Tram Sheahan
> EAD Steering Committee – Angie Sherrer
> O365 User Group – Angie Sherrer and/or Tram Sheahan

5. It is essentially a large data dump of agency records without the ability to manipulate the data based on specific parameters See #1 above. Current functionality of eDiscovery 1.o is equivalent to Exchange multi-mailbox search. When Advanced eDiscovery becomes available this will improve significantly.

Classification

Carissa will send out the information that she gather about the process.
Will be agenda on next meeting.

Future meetings:

Date	Time	Location
April 15, 2020	9 AM to 11 AM	Natural Resources Building, Olympia
June 3, 2020	9 AM to 11 AM	Natural Resources Building, Olympia
July 16, 2020	1 PM to 3 PM	Natural Resources Building, Olympia
September 8, 2020	10 AM to 12 PM	Natural Resources Building, Olympia
November 10, 2020	10 AM to 12 PM	Natural Resources Building, Olympia