



# Setting the Record Straight

Happy Holidays!

May you have peace, joy  
and success in the coming year.

Celebrating 25 Years!

December 2009 / January 2010

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## Ask the Expert

Have you ever had a question about how to handle the records in your office and wished you had someone to talk to? Well, chances are, you are not alone.

Our Certified Records Manager (CRM) will be happy to accept your email questions and will answer those most frequently asked in upcoming issues of *Setting the Record Straight*.

Please make your question clear and concise. In addition, please tell us if you are willing to share your question (and our expert's response) with others. For those who would rather remain anonymous, please feel free to send your question as well. We will make every effort to respond in a timely fashion. Questions will be answered in the order received unless they are published in our newsletter.

To submit your question, please click here and indicate *ASK THE EXPERT* in the subject line: [ASK THE EXPERT](#)

*Setting the Record Straight* is a bi-monthly electronic publication that will notify you of The Data Vault events and specials as well as alert you to the most significant information-related topics in the Records industry. It will also provide you with suggestions and ideas for improvement to your organization's records program. Read it regularly. It will help you stay current with compliance, risk management, legal, privacy and technology issues.

## Active vs Inactive Records

Active records are likely to be needed on a regular basis. Inactive records, on the other hand, are items that must be retained for some period of time due to legal or business requirements -- but are not likely to be accessed on a regular basis (if at all).

[More...](#)



## Records & Information News of Interest

NEW YORK -- New York City office workers who got carried away during a Yankees victory parade apparently began tossing files and documents out the window when they couldn't get their hands on confetti.

Auditor Damian Salo attended the Manhattan parade. He told The New York Post he found all sorts of personal financial documents in the mountains of shredded paper tossed from skyscrapers as the players rode up Broadway.

[More...](#)

## Lunch-n-Learn Offered at The Data Vault

As a service to our patrons, the Data Vault will begin offering quarterly training for Records Managers and RIM personnel in February, 2010.

Most training sessions will be offered free of charge to our clients. Sessions will be scheduled at various times in order to reach a maximum number of participants. Session formats will vary. In addition to formal classroom training, informal and informative Lunch-n-Learn events will feature The Data Vault trainers as well as guest speakers (all considered experts in their field/s).

[More...](#)



## Quick Links



[TDV Website](#)

[Frequently Asked Questions](#)

## Help & Support

[Customer Service](#)

[Certified Records Manager \(CRM\)](#)

[Destruction/Recycling](#)

[Scanning / Imaging](#)



Computer users worldwide create enough digital data every 15 minutes to fill the U.S. Library of Congress.  
- The Wall Street Journal

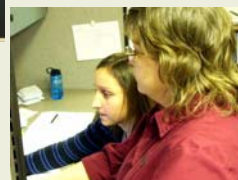
## Customer Service

We plan to focus on a different The Data Vault function/department in each of our newsletters and introduce each of our team members along the way.

The newest member of the Customer Service group, **Lindsay Strobo**, is pictured to the right. She is a recent graduate of U of L with a degree in mathematics. She is engaged to be married in October, 2010. She enjoys playing with her two dogs (pugs) and likes to knit and crochet in her spare time.



**Monica Fisher** (left) has been with The Data Vault for two years. She is from Huntsville, Alabama where she attended the local community college and studied Business Management. She is married and has two children. In her spare time, Monica likes to write poetry, read and bowl. She's a huge UFC fan and supports the Indianapolis Colts and the Lakers.



The senior member of the Team is **Terri Cummings** who has been with The Data Vault for eight and a half years. Terri attended JCC and studied Business. She has three children; 2 boys and a girl; ages 29, 28 and

6. Terri enjoys reading and shopping for antiques and collectibles when time allows.

## Evaluate Your Records Management Program -- FREE

As a 'value-added' service to our clients, the Data Vault would like to offer one hour of records consulting FREE of charge. Missy O'Brien, CRM has worked in the field of corporate Records & Information

## Spotlight ...



Meet **BRAD CURTIS**, our Customer Service/Vault Team Leader. Brad is a WKU graduate with a degree in Biology. He is engaged to be married, but no "official" date has been set. He and his fiancee have recently purchased a new home. In his spare time, Brad enjoys travel, gardening, UK sports and golfing. He also enjoys playing with his 1 year old Maltese and attending his future step-son's football games at Manual.

Management (RIM) for over 17 years and is looking forward to sharing her knowledge, experience and education to our clients on an individual as well as a group basis. She has developed a short questionnaire that will help you evaluate your company's records program and identify possible areas of opportunity. When you have completed the evaluation form, Missy will be happy to sit down with you "one-on-one" and discuss ways to work "smarter...not harder." [More...](#)

## December -- It's Time for Annual Records Review / Destruction

Along with everything else that needs to be done at year-end, it's time to review that list of records currently eligible for destruction!

Keep in mind that items should be retained for the legal and proper retention period. Keeping items for longer periods than necessary can subject your company to significant legal risk as well as increased storage and retrieval costs and reduced efficiency.

## Scan-On-Demand

The Data Vault offers a secure way to store and receive your requested files electronically. You can view, print and even email your files through [TheDataVault.com](#).



The Data Vault is currently offering Scan-on-Demand (up to 50 pages per file) for a special rate of \$10 per file.

Try The Data Vault's exclusive Scan-on-Demand service the next time you need to retrieve a file. When you take advantage of this special offer, you will have your requested file without ever leaving your desk!

For additional information, call Rhonda Burks at (502) 244-1151 or email her by using the Scanning/Imaging link provided above (left).



**Save  
Save  
Save**

## SCAN-ON-DEMAND SERVICE SPECIAL

Print this coupon and enclose it with your monthly invoice for **ONE FREE** scan-on-demand service

Call (502) 244-1151, x122 for set-up and/or additional information.

**Offer Expires On: 01/31/2010**

***This coupon has no cash value***

**\*\*\* This offer is good for one free scan-on-demand per account \*\*\***

Article Continuations ONLY below this area.

## Active vs Inactive Records (cont'd)

Whether you are working with "active" or "inactive" records, the main concern should be the efficient location and retrieval of information as it is needed and the proper disposition of it once any legal and/or business needs have been fulfilled.

Active records are generally organized in one of two ways; filed or indexed. Filing is the method of organizing active records in most offices. Basically, a filing system groups related records in close physical proximity to each other. They could be placed together in a single file, a file drawer, a file cabinet, etc. in order to expedite the location of the information at some point in the future. Generally, "active" records would be found near the work area/s of the individual's who are most likely to need the information they contain. As long

as the information is accessed frequently, local storage (and the accompanying cost) is justified. The Records Manager should work closely with the user of the record/s to determine how to define "frequent" access. A good example might be to consider a record "active" if it is accessed at least 6-8 times per year.

If the record is not accessed often (or at all) but must be maintained for some legal or business purpose, it should be considered an "inactive" record. Inactive records often take up to 1/3 of the file cabinet space in a typical office. File cabinets and office floor space are expensive. Since these records are not needed frequently, it would be much less expensive to store them in an off-site storage facility thus freeing space and equipment for housing additional "active" records.

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## Records Information News of Interest (cont'd)

"We're finding pay stubs. We're finding personal financial information. We found a balance sheet of someone's trust fund showing \$300,000 in stock," Salo told the Post.

Other intact documents included banking data, law firm memos and even some court files.

The founder of one financial firm, Alan Sarroff, says his company reprimanded one "overzealous" employee for throwing records out the window that should have been shredded.

Ticker-tape parades on Broadway are a New York tradition. The city's Downtown Alliance provided more than a half-ton of shredded, recycled paper to skyscrapers and offices down Broadway -- actual ticker-tape has not been used in decades. "The idea of our confetti was to urge people not to use prior documents or anything inappropriate," Downtown Alliance spokesperson James Yolles told New York broadcast station WPIX.

*Information from The Associated Press was used in this report.*

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## Lunch-n-Learn-- RIM Training Offered at The Data Vault (cont'd)

We will begin our training sessions on February 11, 2010 at 11:30 am. The first training presentation will be entitled *DEVELOPING A RECORDS MANAGEMENT PROGRAM* and will highlight:

- \* Where and How to Start a Records Program
- \* Developing a Policy and Retention Schedule
- \* Storing Records
- \* When and How to Destroy Records

This session will be held at the Data Vault at 13201 Data Vault Drive, Louisville KY and will include a boxed lunch.

Note: The training is FREE but you must register (in advance) to attend. Please call customer service at (502) 244-1151 or email [cs@thedatavault.com](mailto:cs@thedatavault.com).

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## Evaluate Your RIM Program--FREE (cont'd)

To obtain the evaluation questionnaire and schedule a time to meet with Missy, please contact her at: (502) 244-1151, extension 160 or send an email to the CRM link above.

Remember: This one hour service is offered to each of our clients fee and obligation FREE.

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**STATEMENT OF MISSION**

The Data Vault is a market driven Commercial Record Center. We will maintain clean, secure repositories for vital and inactive business records, and will aggressively market any professional records management services demanded that can be delivered with excellence and at a fair profit.

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