FOR THE RECORD

VT STATE ARCHIVES & RECORDS ADMINISTRATION

VERMONT HIGHLIGHT

METADATA FORUM

August 13, 2008

Informal, information gathering and sharing opportunity!

See article on Page 3 for more information!

On July 1st the new Vermont State Archives and Records Administration (VSARA) was born, the fruit of the union of the State Archives (Secretary of State's Office) and the Public Records Division (Department of Buildings and General Services).

VSARA is a division within the Secretary's Office, with offices at Redstone in Montpelier and in Middlesex (Record Center). A new archives/reference facility is planned for the record center and VSARA should be co-located in Middlesex by December 2009.

The consolidation enhances our ability to give consistent, standards-based guidance to agencies as they meet their requirements to have current, comprehensive record management plans (3 V.S.A. §218). Okay, what will consolidation mean for you?

All existing record series and disposition orders will remain in effect until superseded by record schedules. Many existing disposition orders are dated (some go back 30 or more years) while record series have become, in some cases, elastic as agencies use them for more than the records originally described.

We urge agencies to review their existing record series and disposition orders to see if they accurately reflect current mandates and practice.

Agencies wishing to update their records programs should go through the Targeted Assistance Program. Information on TAP can be found at: http://vermont-archives.org/records/tap/index.htm.

UPGRADING TO THE EXCHANGE 2007 E-MAIL SYSTEM

As discussed in previous newsletter articles, the Department of Information and Innovation (DII) is upgrading the enterprise e-mail system from Exchange 2003 to Exchange 2007. All the departments and agencies currently running on the DII e-mail platform will be migrated over the next 8 weeks.

A subsequent project phase will focus on moving remaining departments and agencies onto the enterprise e-mail platform. A significant number of State Agencies and Departments are upgrading to the DII hosted Exchange 2007 e-mail system. Final implementation preparations are underway.

A migration team has been identified for each Agency and Department. These migration teams have an IT, Business and Help Desk representative from their area. These migration teams will be brought onto the system a couple of days prior to end user migration for that Agency or Department.

VSARA (CONTINUED FROM PAGE 1)

VSARA includes record analysts who work with agencies, primarily through TAP. VSARA's records analysts — Tanya Marshall, Scott Reilly, and Katie Sherman — all have graduate degrees in the field of information and records management.

In addition to TAP, the records analysts comprise VSARA's research and policy development unit. This unit is responsible for tackling many of the issues and concerns regarding records that are raised by agencies, such as imaging, metadata, records retention and destruction, and public access.

Other record services and assistance provided by VSARA is continued use of the State Records Center for off-site storage, record retrieval, and reformatting in digital or micrographic formats. Details are available through our online "managing records" section at: http://vermont-archives.org/records/.

We look forward to working with you.

> VSARA will begin offering Records Management Training through *The Summit* in September 2008.
>
> See *The Summit* website for more: http://www.vermontpersonnel.org/employee/training.php

RECORDS CENTER DISTRICT RUN

WEDNESDAY AUGUST 28

Paperwork Due: Wednesday, August 6

LOCATIONS:
- Barre
- Hyde Park
- Morrisville
- Newport
- Orleans
- St. Johnsbury

EXCHANGE 2007 (CONTINUED FROM PAGE 1)

All mailbox migrations will be done during nighttime hours, so that there is no disruption of service. Migrations will be done Agency by Agency with smaller Agencies being migrated in one evening, while very large Agencies may be completed over the course of a few evenings.

Migration begins in mid July and should be completed by mid September. You should notice a significant improvement in e-mail system response time with Exchange 2007. However, you won't notice any difference in the Outlook client, the software you use to actually view your e-mail.

If you use Outlook over the web (OWA), you will notice some differences in the look and feel of that application. Microsoft Corporation has implemented many improvements with this product. For information about your migration, training materials, or other common ques-

tions, please go to the project website at :

http://dii.vermont.gov/Business_Users/EPMO/Project_Management/Current_Projects/exchange

As part of the overall system implementation an additional technology called Enterprise Vault (EV) is being rolled out. This technology allows for improved stability and response time within Exchange by "vaulting" old or very large e-mails.

In essence it moves the actual data out of the day-to-day system and parks it into another server. The subject line and first 500 characters of the e-mail will still be present in your In or Out box, but the majority of data is actually moved. If you need to access that e-mail, you can double click on that entry and the original e-mail message will be viewed from the vault.

This technology is an integral part of the Enterprise Exchange platform and managing e-mail in this way maximizes the performance of the e-mail system.

In this initial implementation all e-mail that is more than 6 months old and e-mails larger than 2 megs and older than 2 weeks will be vaulted. For those that have constantly battled with size constraints in the current e-mail system, EV will provide a huge value in managing the size of stored information in your mailbox as well as across the entire State.

In the future, once policies are defined for retention of e-mail in EV, it will be configured to automatically delete e-mail that reaches a certain age.

PROJECTS AND THE ENTERPRISE

The word "Enterprise" has a few different definitions. It can mean a business organization; an industrious, systematic activity; or an undertaking that is broad in scope, risk, and complication.

For *i*START, all the definitions of the word "Enterprise" are embraced. During our weekly meetings, members share details of their projects— looking for interconnections, interrelationships, and even overlaps — with the intent of finding ways to systematically apply the efforts of one project for the benefit of another.

Sharing project details and information brings the State closer to an "enterprise" approach. Rather than the ubiquitous "silos," there is communication and collaboration toward common goals. This effort significantly reduces the burden of each agency "having to do it all."

Current projects involving iSTART members include:

- Imaging
- Project management
- Metadata / Data dictionaries
- Enterprise Content Management
- Business process improvement
- Record retention requirements

Questions about current projects or Enterprise project ideas may be e-mailed to iSTART@state.vt.us.
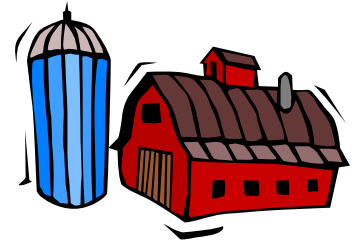
Silos are great for Vermont farms but not Vermont government.

Help *i*START bridge our information silos.

METADATA FORUM: AUGUST 13, 2008

Metadata is a term used for information or data that describe a resource or asset. Metadata can either describe the resource itself or the content of a resource.

While we may not think of metadata as part of our daily lives, we use metadata all the time when communicating and sharing information with others. Metadata speeds up the process for searching and retrieving information.

Picture yourself shopping for a fuel-efficient vehicle for your daily commute. Before you know what dealer can help you, you might start a search in Google. A simple search may provide you with some specific information, including MAKE, MODEL, and other car characteristics. While you may not have known any of this information before you started your search, the ability to find and re-trieve descriptions of cars sped up your search.

Now you have the ability to find dealers who sell the type of cars that interest you. MAKE, MODEL, etc. are all metadata associated with cars.

If you have been tasked with establishing a metadata standard or data dictionary — or finding an existing standard to adopt and use — *i*START is interested in hearing from you. On **Wednesday, August 13, 2008 we will be holding a "Metadata Forum" from 10:00—12:00.**

This forum provides the opportunity to share and openly discuss metadata efforts within the State with the goal of identifying possible "Enterprise" projects.

REGISTER: iSTART@state.vt.us

METADATA FORUM

WEDNESDAY

August 13, 2008

10:00 AM—12:00 PM

26 Terrace Street, Montpelier (Redstone Building)

This is an informal, open discussion opportunity for public employees interested in metadata.

The LEGAL CORNER will be back in the next issue of *FOR THE RECORD.*

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MEMBERS
Gregory Sanford, State Archives

Tanya Marshall, State Archives

Darwin Thompson, DII

Rick Daniell, DII

Christine Hetzel, Project Manager

Mike McShane, Legal Advisor

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IN THE NEWS

- The National Association of State Chief Information Officers (NASCIO) recently released *Ready for the Challenge? State CIOs and Electronic Records*. The report states that State governments have a "piecemeal" approach to electronic records management. NASCIO advocates for an enterprise approach to meet legal record-keeping requirements and indicates that State CIOs, archivists, records managers, and the State Attorney General all have a role to play in determining how to manage electronic records. Read the report at: http://www.nascio.org/publications/documents/NASCIO-E-RecordsChallenges.pdf

- The Government Accountability Office (GAO) reported this month that Federal agencies are inconsistent in preserving electronic mail (e-mail), making it difficult to document the activities of the Federal government. H.R. 5811, introduced on April 15, 2008, by Reps. Waxman, Clay, and Hodes, modernizes the requirements of the Presidential Records Act and the Federal Records Act to ensure that mission critical records, including e-mail records, are preserved. It was passed by the House on July 9, 2008. For more information about the GAO report, see: http://oversight.house.gov/story.asp?id=2068