Records Manager Roundtable

RECORDS MANAGEMENT IN THE REMOTE WORKING WORLD

Greater Sacramento Capitol Chapter of ARMA

INFOCOMPASS

Agenda

2:00PM SIGN-INS

2:10PM ANNOUNCEMENTS

2:20PM RECORDS ROUND TABLE (BRING YOUR RECORDS CHALLENGES/QUESTIONS)

2:50PM GENERAL LESSONS LEARNED

3:00PM ADJOURN

Announcements

Introductions

- Chuck Booz, President, Information Governance
- Nitza Medina-Garcia, CRM, Vice-President, InfoCompass, Inc.
- Doug Stewart, Secretary, OpenText
- Fernando Vellanoweth, Treasurer, Innoventure Group
- Jen Farnham, Programs, Access

Records Knowledge Conference rescheduled for October 21st

Future chapter meetings virtual

Remote Working RM Challenges/Questions

How is your organization remotely accessing and sharing documents, emails and paper files?

- VPN, Citrix, TeamViewer, Cloud DMS, Remote Desktop Connection
- Are some processes still happening in person with limited staff? Scanning, mail pick up, etc.

Remote working platforms presenting data security/communication challenges (Zoom, Teams, Slack, Webex)?

Moving processes previously done in person to virtual/electronic challenges (esign, remote notary)

How to reinforce good records management/information governance practices?

Please enter your question/challenge in the chat

General Lessons Learned

What are your top 3?

Resources

ARMA Covid 19 Resources: https://bit.ly/ARMACovid19

ARMA RIM Month: https://bit.ly/ARMARIM2020 Promo code discounts available

LinkedIn Learning Path for Remote Working: https://bit.ly/LinkedInLearningRemote

Microsoft 365 Remote Work Checklist: https://bit.ly/microsoftremotechecklist

Zoom meeting best practices: https://bit.ly/ZoomBestPracticesResources

Teams YouTube Channel: https://bit.ly/TeamsYouTube

Canva virtual backgrounds: https://bit.ly/CanvaZoomBackgrounds

Asana, Trello or ClickUp for virtual task management

Vcita or You Can Book Me for online scheduling

RIM MONTH APRIL 2020

RECORDS AND INFORMATION MANAGEMENT

Virtual Meeting Tools

Skype for Business: audio and video conferencing. You will need to create a Skype account, and then you're able to sync with SharePoint in Microsoft and share media. FREE download.

Facebook Messenger: able to text chat, audio message, or face-to-face web conferencing within the app, may be useful for getting into contact directly with businesses through their Facebook page, FREE .

Zoom: used by many educators currently. Easy to use, chat/audio/video available, can show screen in real-time, can be online or in app, FREE to sign up by using work email, ZoomPlus offers more for a price

GoToMeeting: one-click meetings, collaboration meetings made easier, webinars available, cloud recordings, Office365 plug in, Cost starting at $12.00.

TeamViewer: software for audio and video conferences, interactive screen sharing, Cost starting at $49.00.

Microsoft Teams: uses SharePoint to share files in Office programs, conference calls, group chat, FREE to those with Office365 program package, Costs start at $12.95/month for others.

Thank You!

For more information about our ARMA chapter:

https://armasac.org/

For more information about our co-host InfoCompass:

https://infocompass.com/