

Legal Aspects of Pricing

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Thermostat/Electronic Records ID and management

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Digitization of paper records

Digitization of paper records

Cloud computing and social media

Cloud computing and social media

General Tips

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- Have a consistent level of
- Understand your market
- Have a plan to help you stay



Legal Aspects of Pricing

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- Always be mindful of your security needs
- Have a plan to keep your term e-records accessible and readable.

Management - ID and com

the "basics" -- how to deal with documents

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paper

At MINIMUM, talk to these people first:

- Your own IT department
- UITS (high-level, high-level process)
- Information Security Office
- Records Management
- Legal Affairs
- Purchasing (if using a CMS)

Computing and Media

paradigm, new challenges

What do I do with Social Media?

Social media posts are records

Social media management

Most people won't notice records management for day-to-day social media use

Electronic Records

Value of a record determined by content, not format!

Electronic Record	Paper Analog
E-mail message	Memorandum letter
E-Firm template	Firm master copy
Microsoft Access database	Accession card catalog
Stroke paper (e-read or PDF)	Stroke paper submitted in-class or via mail
Instant message log	Memorandum of conversation

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Is it a Record?

- Does your file:
 - Support or document a transaction?
 - Document the formulation or execution of a policy, interpretation of a policy, or change of policy?
 - Document Actions taken in response to an inquiry?
 - Relate to the substantive business of your office or work unit?
 - Provide information regarding the historical development of UWM programs or people?
- If "yes" to any of the above, it is a record!



Electronic Records

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Electronic Record

Paper Analog

E-mail message	Memo, typed letter
E-Form template	Form master copy
Museum accessions database	Accession card catalog
Student paper (e-mailed or D2L-submitted)	Student paper submitted in class or via mail
Instant message log	Memorandum of conversation

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E-records ID and management

But first, some vocabulary:

- Electronic Record: any record created/maintained in a computer-readable format.
- Born-Digital: Records that were originally created in electronic format.
- Application document: a document created by a desktop application (e.g. Word or Acrobat).

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These are the "basics"-- how to deal with application documents.

It's easier to access and share your records.

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Why keep electronic records at all?

The physical space requirements for storage are MUCH lower.* It's easier to find older records.

What happens once I don't need an e-record anymore?

Two Paths:

Disposition

- The final office of applicable Record Retention and Disposition Authority (RD&DA) will determine records.
- If a record belongs to a particular record in the paper form, its electronic form is part of that record as well. Just having "links" to a record is not enough.

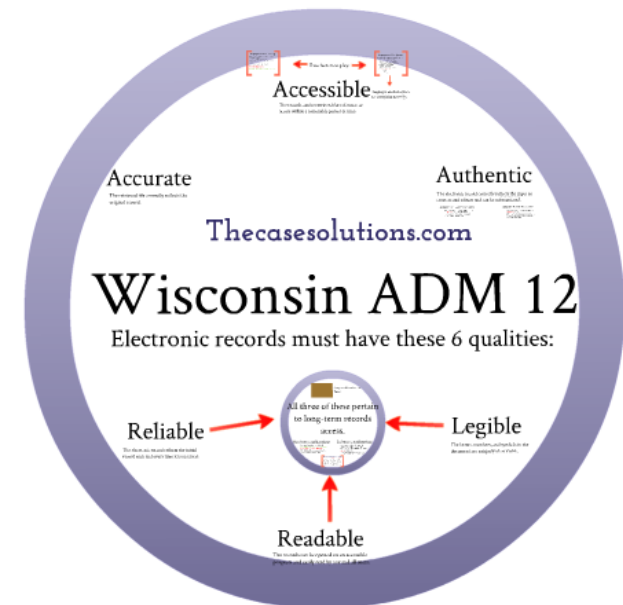
Archiving

- If a record has been created or received digitally, the UFRSI guidelines apply as to how to store it.
- Records and documents created by a number of media:
- Internal or external hard drive
- Removable media (CD, DVD, ZIP, JAZZ, Flash drive)
- These are examples of media attachments, back up files, cloud files.
- The procedure for transferring electronic records to create the same as the paper records?*

As of October 2012, you have some additional file formats and media options.

<http://www.dhs.gov/e-records/docs/20121012-01.pdf>

20121012-01.pdf



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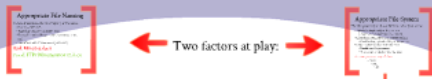


Physical s

*That said, robust electronic storage is neither free nor infinite.

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Storage are



Accessible
 Tagging is another option for organizing your files.
 The records can be retrieved for reference or access within a reasonable period of time.

Accurate

The retrieved file correctly reflects the original record.

Authentic

The electronic record correctly reflects the input of creators and editors and can be substantiated.

Solution A: Legal Preservation
 Solution B: File Protection

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Electronic records must have these 6 qualities:

Reliable

The electronic record reflects the initial record each and every time it is accessed.

All three of these pertain to long-term records access.

Hardware considerations Software considerations

Legible

The letters, numbers, and symbols in the document are uniquely identifiable.

Readable

The records can be opened on an accessible program and easily read by any and all users.