

# 2016 e-Records Conference

Friday, November 4 | Austin, Texas

*At the Intersection of  
Technology and  
Records Management*



Texas Department of Information Resources

Sponsored by  
Texas State Library and Archives Commission (TSLAC) and Texas Department of Information Resources (DIR)

#TXeRecords | @TSLAC | @TexasDIR

# Welcome from DIR and TSLAC

The Texas Department of Information Resources and the Texas State Library and Archives Commission welcome you to **e-Records 2016: At the Intersection of Technology and Records Management**.

Over 125 different state agencies, state universities, local governments, and 20 exhibitors are registered. Some of the more than 300 attendees have been to several of these conferences and some are first-timers. Take this opportunity to network with colleagues and learn from each other. Please visit the exhibitors during the breaks and at lunch.

We are fortunate to offer a robust roster of both public and private speakers who will share their expertise. **We welcome you and hope that you enjoy the conference today!**

## Conference Resources

### Internet access is available during the conference

Connect to **attwifi** network. Open your web browser. Click on "I have a Coupon" & enter this code: **WPND-TRQD-H4**

### Conference speaker materials

Available presentations: **[bit.ly/erecords2016\\_presentations](http://bit.ly/erecords2016_presentations)**

<b>8:00 AM</b>	<b>Registration and Networking</b>
<b>8:30 AM</b> <b>Big Tex</b>	<b>Welcoming Remarks</b> Stacey Napier, <i>Texas Department of Information Resources</i> and Mark Smith, <i>Texas State Library and Archives Commission</i>
<b>8:55 AM</b> <b>Big Tex</b>	<b>Update from the Statewide Data Coordinator</b> Ed Kelly, <i>Texas Department of Information Resources</i>
<b>9:10 AM</b> <b>Big Tex</b>	<b>Accessing the Texas Digital Archive</b> Mark Myers, <i>Texas State Library and Archives Commission</i>
<b>10:10 AM</b>	<b>Morning Break – Refreshments, Exhibits Open</b>
<b>10:30 AM</b> <b>Big Tex</b>	<b>Case Study: Disposing of Paper Records after Scanning – Implementing Legally Defensible Policies and Procedures</b> Bob Guz, CRM, <i>City of Austin</i> and Katherine Cranford, CRM, <i>City of Austin</i>
<b>Li'l Tex</b>	<b>Vendor Neutral Data Management and Record Retention</b> David Cerf, <i>StrongBox Data Solutions</i>
<b>11:45 AM</b>	<b>Lunch (Provided) – Networking, Exhibits Open</b>
<b>12:45 PM</b> <b>Big Tex</b>	<b>Process Mapping as a Best Practice: A Vehicle for Implementing Technology and Shaping a New Culture</b> Sarah Thomas, <i>University of Houston</i>
<b>Li'l Tex</b>	<b>Showcase: Enterprise Information Management in SharePoint 2016</b> Jason Dausey, <i>DataPoint Solutions</i>
<b>2:00 PM</b>	<b>Afternoon Break – Refreshments, Exhibits Open</b>
<b>2:15 PM</b> <b>Big Tex</b>	<b>Digital Workflow Optimization and Automation</b> Kumar Rachuri, <i>Adobe</i>
<b>Li'l Tex</b>	<b>Records Management vs. #recordsmanagementrocks</b> Sarah Hendricks, <i>Texas Department of Public Safety</i>
<b>3:30 PM</b>	<b>Afternoon Break</b>
<b>3:45 PM</b> <b>Big Tex</b>	<b>Email Redactions Made Easy</b> Theresa Scott, <i>Town of Flower Mound</i>
<b>4:30 PM</b> <b>Big Tex</b>	<b>Conference Wrap-up</b>

# Today's Speakers

## David Cerf, President and CEO, StrongBox Data Solutions

David Cerf is President and CEO at StrongBox® Data Solutions, Inc. With more than 30 years of experience in the IT industry, David is an accomplished author and speaker on topics surrounding data growth, storage and protection. He leads the SDS team to deliver new and innovative solutions to help simplify data management. Previously, David led strategy and business development at Crossroads Systems from 2005 to 2016 where he launched innovative products to solve big data preservation and protection. Prior to joining Crossroads, David served as Vice President of Sales and Business Development at NexQL, a leading provider of advanced database acceleration technologies. He was also a co-founder of 360World, a national provider of video and imaging solutions. In 1988, as the founder and managing director of the Dallas Business Incubator, he was responsible for the development and funding of more than 50 new high-growth startup companies.

## Katherine Cranford, CRM, Corporate Records Analyst, City of Austin

Katherine Cranford, CRM is a Corporate Records Analyst for the City of Austin, Texas. She consults with City departments on electronic records management. Katherine was previously a taxonomist and knowledge management specialist for enterprise content management systems at Llesiant (Bloomberg BNA), Demand Media and Dell Computers. She holds a Masters in Information Science from the School of Information at the University of Texas.

## Jason Dausey, Director of Professional Services, DataPoint Solutions

Jason is a recognized expert on business automation, content management, collaboration strategies within SharePoint and its integrated suite of products. DataPoint Solutions technical team is led by Jason Dausey, who has consulted and architected over 50+ SharePoint installations, configurations and/or development efforts. He has extensive SharePoint integration and deployment experience with a wide range of implementations especially with large scale Federal government agencies and Fortune 1000 organizations. He has performed numerous data migrations to SharePoint totaling over 5TB of data from various systems including: file shares, eRoom, earlier versions of SharePoint, Oracle 8G, and others. Jason has performed end user training, and classroom training for many organizations in addition to his community speaking events at local and national conferences including SharePoint Saturdays, company-held events and other industry conferences.

## Bob Guz, CRM, Sr. Business Process Consultant, City of Austin

Bob Guz, CRM, ERMs, is a Sr. Business Process Consultant for the City of Austin, Texas. He is responsible for the management of technology projects within the Office of the City Clerk, is a lead for the implementation of a City-wide electronic records management system, and has over 25 years of technical and records management experience. Bob's consulting and project management experiences include imaging and document management system development and records management program implementation. Previously, he was a program director with Iron Mountain Consulting Services and a technical project manager for First Consulting Group. He has also worked as an information and records management professional for SEMATECH, Texas Instruments, and NASA.

## Sarah Hendricks, Project Manager, Texas Department of Public Safety

Sarah Hendricks currently serves as a Project Manager with the Texas Department of Public Safety's Enterprise Project Management Office. She is also the agency's main point of contact on matters involving agency records management. During her 10-year career with the agency, she has been instrumental in standing up the agency's Policy, Projects, and Portfolio Management Office, which consolidated enterprise-level projects under one office. Sarah has held a number of positions with increasing responsibilities dealing with varied subjects including Government Relations and Media.

### **Mark J. Myers, Electronic Records Specialist, Texas State Library and Archives Commission**

Mark J. Myers is the Electronic Records Specialist with the Texas State Library and Archives Commission (TSLAC) and has over 15 years of experience in electronic records management and digital preservation. Mark started with TSLAC in June, 2014, and is building a data archive to preserve and make accessible the electronic records of state government, beginning with the records of Governor Rick Perry in 2016. Mark will also be providing advice and assistance to state government agencies for the long-term preservation of their electronic records. Prior to his work in Texas, Mark was the electronic records archivist with the Kentucky Department for Libraries and Archives for 13 years. Mark has a bachelor's degree in secondary education from the University of Kentucky and graduate work from Auburn University. He now lives in Austin, TX, with his wife and two children.

### **Kumar Rachuri, Director - State & Local Government Solutions, Adobe**

Kumar Rachuri worked for the great State of Ohio for eighteen plus years. During his long and fulfilling career as a public servant, he contributed his services across five different agencies in various executive roles as a CIO and as a Deputy Director. As a CIO, Kumar was recognized for his exemplary work as one of the Nation's Top 25 leaders by Government Technology Magazine in 2011, a distinction given to innovative and visionary leaders as the "Doers, Dreamers, and Drivers" in the United States. Kumar's contribution towards Ohio Shared Services as the Deputy Director of Growth and Strategy received accolades from notable organizations, i.e., Gartner and Harvard Business Review. Eventually, leading them to write white papers of Ohio's cutting edge implementation of business process re-engineering. Making the transition to private sector Kumar continues his successful professional career at Adobe as the Director of State of Local Government Solutions. In this role, Kumar leads Adobe's growth and development strategy of its government solutions footprint with a special focus in providing solution oriented technology offerings solving public sector challenges.

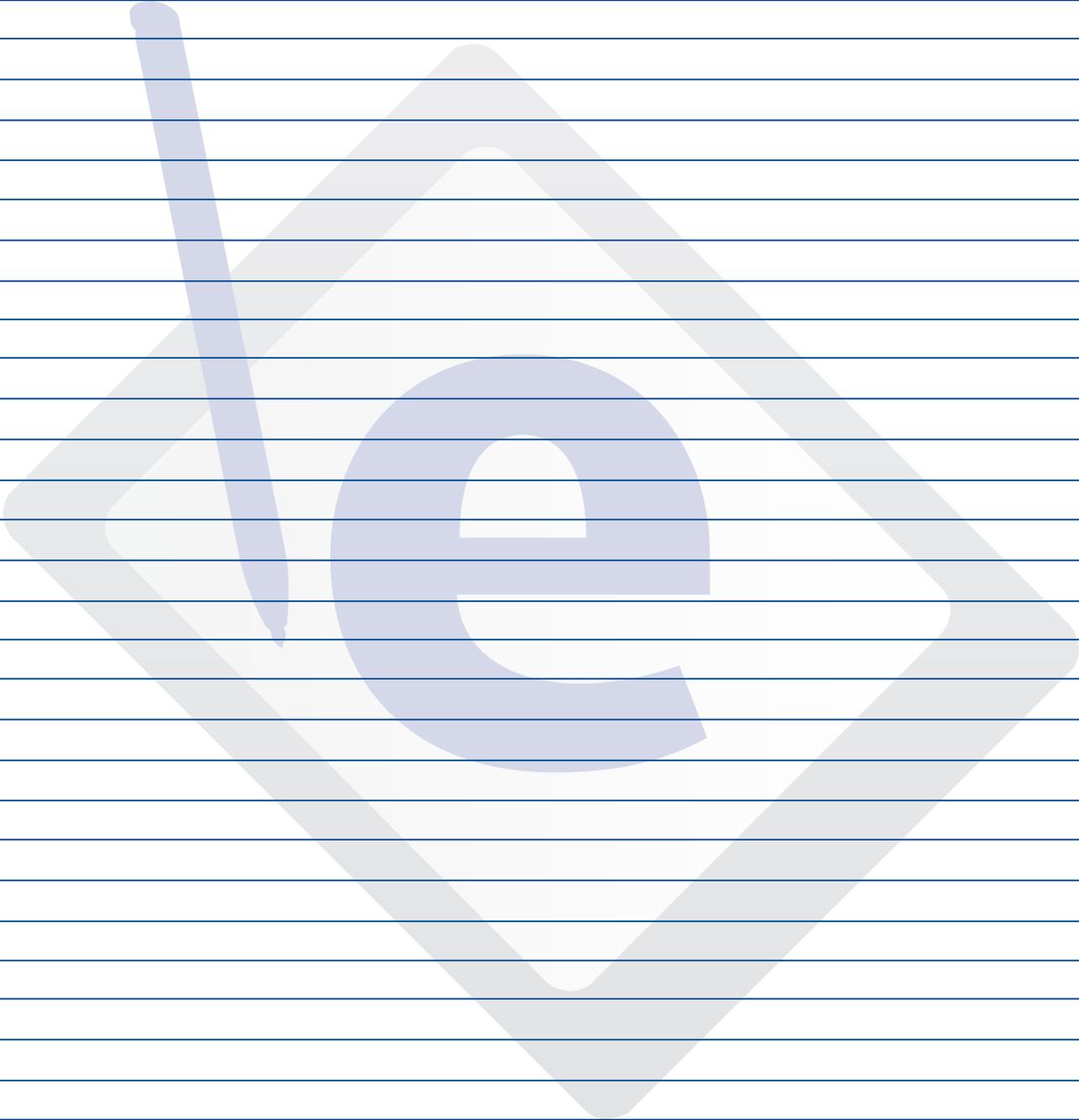
### **Theresa Scott, Town Secretary, Town of Flower Mound**

Theresa Scott has spent 14 years working in local government and 5 years as Town Secretary in Flower Mound, population 68,000. Before that she worked as Economic Development Director in St. Charles, Illinois.

### **Sarah Thomas, Project Manager, Gift Management, University of Houston**

Sarah Thomas is the Project Manager for the Department of Gift Management at the University of Houston. She designs and leads large complex projects for the department, including implementing a document imaging system and electronic record management policies. In addition, she analyzes gift management practices and works with the team to identify inefficiencies. Sarah also serves as a resource to research best practices in gift processing, records management, technology trends, team building, and project management. Sarah also has over 10 years of experience in non-profit management.





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## Exhibitors

Please visit the exhibit area to learn more about products and services available.

Access Sciences

Adobe

AT&T

Austin ARMA

Box

Catapult Systems

DataPoint Solutions

Document Logistix

DocuNav Solutions

Information Builders

Institute of Certified Records Managers (ICRM)

MCCi

Neubus

Oracle

PacoTech, Inc.

Panasonic Office Products

Precision Micrographics & Imaging, Inc.

Precision Products, Inc.

Texas Department of Information Resources

Texas NIC

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