

# Technical Certification for the Information Professional: The CDIA+

For those RIM professionals seeking additional credibility in the digital domain, earning the CDIA+ certification may be the best approach

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Records and information management (RIM) professionals have had an uphill fight against those who view records managers as relegated to the paper records domain. In a recent interview, one records manager met with a chief executive officer (CEO) seeking a records manager to manage the three records centers filled with legacy paper the corporation had inherited in a merger. When asked about imaging applications and electronic records, the CEO shrugged and replied that the IT department took care of those records.

Managing a variety of information formats is increasingly routine in most records management programs. Today, document imaging is bridging paper and electronic environments, and every RIM professional is confronted with technologies such as copiers featuring network scanning and faxing. How do RIM professionals leverage themselves in the workplace to solidify credibility in the electronic records realm? How do they

gain credibility with IT?

One way is to do what thousands of IT employees routinely do: gain a technical certification. The Certified Document Imaging Architect (CDIA+) certification, which is closely allied with records management and contains principles familiar to the RIM professional, is the one technical certification that offers RIM professionals a foothold within the IT realm. The successor to the Certified Document Imaging Architect (CDIA) certification, the CDIA+ is the globally recognized standard of competency in document imaging and document management. It validates expertise in the best practices

used to plan, design, and implement a document imaging system.

## The Evolution of CDIA to CDIA+

The CDIA was originally developed in 1995 by the Computing Technology Industry Association (CompTIA), a consortium of vendors, and the initial focus of the certification was on the consortium members' technical sales staff. But it soon became popular among vendors offering imaging systems and imaging consulting services. Between 2001 and 2003, the number of those who had earned the certification grew by 63 percent. In 2002, CompTIA – which is a vendor-neutral organization that sponsors a number of computer certifications, including the A+ computer hardware certification held by more than 120,000 technicians – re-branded the certification as the “CDIA+,” overhauling the exam objectives to better suit the needs of the document imaging industry. In 2005, CompTIA further updated the exam to more accurately reflect the realities of today's imaging and docu-

### At the Core

This article

- ▶ Describes the history of the CDIA+
- ▶ Outlines the certification's usefulness to the RIM professional
- ▶ Discusses some common questions surrounding the CDIA+'s application in the RIM field

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ment management environment. The exam's emphasis has shifted over time from the purely technical to include management skills. AIIM International recognizes the CDIA+, as well as the Certified Records Manager (CRM) certification, as points toward attaining its Master of Information Technology and Laureate of Information Technology designations.

### **The CDIA+ Exam Requirements and Components**

The CDIA+ is a 90-minute, 85-question examination that requires a passing score of 700 out of 900 points. It covers five domains: gathering the business requirements, analyzing business process, recommending a solution, designing a solution, and planning implementation. The test is designed for those with 18 months or more of experience in document imaging systems implementation and management. Project management is an important part of the certification, as well as knowledge of records management, network security, hardware, and imaging technology. This certification does not have minimum educational requirements and, similar to other technical certifications, does not require continuing education to maintain. Anyone may take the test at any time at commercial testing centers around the world. Worldwide there are 6,700 holders of the CDIA+, and the certification enjoys a high profile among vendors and employers who require their sales and technical staff to hold it.

### **How Records Management and the CDIA+ Intersect**

From the beginning, CompTIA recognized the role of records management principles. Records retention plans are emphasized, and an understanding of the role of the records manager, unlike many IT certifications, is not only mentioned but is required. Recognition of the role of RIM professionals was a necessity given the potential for purchasers of document imaging systems to dispose of paper records without regard for federal, state, and local legal obligations.

Interest in the examination has grown among records managers. In 2003, a salary survey conducted on the records management listserv revealed fewer than 3 percent of the respondents who held the CRM also held the CDIA certification. The 2005 records management listserv survey results, however, showed that 10 percent of the responding CRMs also

held the CDIA. In recent years, CompTIA and vendors of CDIA+ educational materials have distributed information about the certification at RIM-related conferences.

In the IT world, knowledge of terminology and processes are essential to communicate and achieve success. The CDIA+ examination is one arena where

# CompTIA CDIA+ Sample Test Questions

## Question 1

(corresponding objective: 1.4)

A city has determined that it will provide access to City Council minutes and upcoming agenda items. Which is the best solution that will allow for the broadest access for all interested parties?

- A. Use of an FTP site
- B. Web-based Internet access
- C. Publication on CD-ROM for distribution
- D. Public Kiosk availability at various sites, including libraries

## Question 2

(corresponding objective: 2.1)

A consultant analyzing a company's document imaging requirement discovers that there appears to be a number of concerns from users about changing to a newer system. Which of the following is the best way to address such concerns?

- A. Ask the project leader or company management to deal with the situation.
- B. Emphasize that it has been a management decision to change to the newer system.
- C. Consider end-users' concerns and determine whether they can be met through education or changes in the solution.
- D. Implement the changes provided that the management/project leader agrees with the recommendation for the newer system.

For more sample test questions, the answers to these questions, or to take a sample interactive quiz, visit [www.comptia.org/certification/cdia/samplequestions.aspx](http://www.comptia.org/certification/cdia/samplequestions.aspx).

the worlds of paper and digital meet.

John Annunziello, who is studying for the CDIA+ examination, explains, "We are implementing an EDRMS, and the CDIA has helped me understand the scanning process. As a non-IT person, it provides me some understanding of the IT world."

The certification also extends beyond the simple scan-to-file process. Management of storage systems, retrieval, and distribution of electronic records are also a part of the knowledge domain. For those RIM professionals wishing to find a way to increase their skills, preparing for the test can be a great way to expand electronic records skills and stay current with terminology and practices.

## Why RIM Professionals Should Pursue the CDIA+

RIM professionals should choose any technical certification on the basis of its impact on their career. Technical certifications from major vendors, such as Cisco, Microsoft, and CompTIA, are generally the most recognized and gain the most visibility for those who have earned them. While the CDIA+ certification may be more visible in IT circles than in the records management realm, attaining it can provide RIM professionals several important benefits: proof of their knowledge – which gives them added credibility – visibility, and enhanced job opportunities.

Credibility is perhaps the greatest asset of this certification, especially for RIM professionals who are charged with recommending or implementing information systems or who are interacting with others who are charged with these duties.

"For a records manager, the CDIA would be proof that they are more than just a paper box mover," says Bernard Chester, a principal with Imerge Consulting. "It would demonstrate that they have enough technical knowledge and exposure to address issues of digital conversion and to work with IT staff

on related issues."

Ricoh relies on the CDIA+ certification. A November 2005 press release tells why:

CompTIA CDIA+ certification is the IT sector's first global standard of competency and professionalism in the document imaging/document management industry. Individuals who achieve CompTIA CDIA+ certification have demonstrated knowledge and mastery of scanning, storing and output of black-and-white and color documents; and have the expertise to analyze customers' business processes and design appropriate document imaging and management solutions to support their needs.

Just as government and corporations are seeking professionals with the CRM certification, organizations issuing requests for proposals (RFPs) for document conversion projects are increasingly requiring that respondents' staff have the CDIA certification.

"CDIA credentials are often required in my business in responding to RFPs from current and potential clients," Douglas P. Allen, CRM, CDIA+, of Global 360, explains. "The CDIA provides me, and a few select others in my organization, with the ability to support our company's efforts to win business...so we can demonstrate that there's a positive contribution [of the certification] to the "bottom line."

Vice President George Angelato of Hyland Software, who oversees testing of OnBase, explains that his employees who have worked to earn the CDIA+ have enhanced their careers and his business in a number of ways.

"The CDIA+ has helped build confidence," Angelato says. "It gives the individual additional knowledge relevant to the industry we serve. Individuals feel more comfortable talking about the industry because they have this knowledge. The CDIA+ gives

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a competitive advantage. When you are working on an opportunity and you can share that everyone in your organization has taken the time, expense, and energy to become certified in an area germane to your industry, it shows a commitment. The CDIA+ helps to grow individuals. Those that are in this industry must stay on top of every changing technology. The CDIA+ is one means by which to accomplish this.”

While there is little direct evidence that records managers with the CDIA+ certification currently make significantly more money than those who don't have it, they are more likely to obtain work in an automated environment than remain format-bound in the paper realm where salaries and career paths differ. With the vast majority of records being created digitally, it makes sense to move into the realm where the information is being created, stored, and destroyed.

### **The CDIA+ Helps RIM Professionals Thrive in Two Worlds**

Unlike the CEO who was unable to understand the relationship between paper and electronic records, today's information professionals are forced to deal with both and can benefit from certifications proving expertise in both worlds.

While the CRM certification involves a rigorous examination of a

broad domain of records and information, the CDIA+'s more specific focus on electronic recordkeeping and distribution systems can also be valuable for RIM professionals, who often must interact with IT – even help bring IT into regulatory compliance – and

implement retention schedules for information on a variety of media.

The CDIA+ is the present benchmark for skill levels in document imaging and is the only single certification that requires a demonstration of competence in the domains of network systems, security, Internet, storage management, and records management. For the RIM professional, the CDIA+ offers a way to bridge the technology credibility gap between records and IT. Earning the certification may be the most cost-effective way for records managers to enhance their careers, as it provides them an advancement path for specialized imaging operations and gives them and their staff credibility within the organization and among customers. ■

**Editor's Note:** Additional information about the CDIA+ certification can be found at the CompTIA site, [www.comptia.org](http://www.comptia.org).

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