

State of the Art Electronic Recordkeeping Techniques & Technology

Electronic Recordkeeping – EDRMS 101

Instruction by Bruce Miller IGP, MBA

Duration
8 hours (1 day)

EDRMS 1U

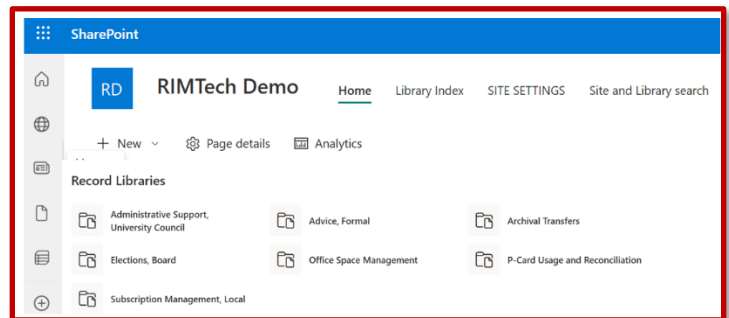
RIMtech Public Online Courses are scheduled periodically and open to anyone. Attendance is limited to optimize the learning experience. We assume your content management platform will be Microsoft SharePoint. All courses are fully and equally applicable to any of the (5) popular records management software products available for SharePoint, with the exception of courses where we teach specific records software products.

This is a **Foundation** Course



RIMtech Advanced EDRMS Course Categories		
Category	Duration	Details
Foundation	1 day	All the fundamental concepts, principles, definitions, and understanding of all elements of modern EDRMS (E lectronic D ocument/ R ecords M anagement S ystems) you need to know. A prerequisite for any Deep-Dive course. A full day dedicated to this critical foundation, versus a half-day within any Introductory-level course. No prerequisites necessary.
Introductory	1 day	Only have 1 day to learn? An introductory-level course is ideal for you. The first half day of all Introductory courses is the same - EDRMS Fundamentals. These fundamentals are essential in order to fully understand the topic covered during the second half of the day.
Deep-Dive	1 day	Need to go deeper? Deep-Dive courses feature more "How To" than introductory courses of the same topic. Two Prerequisites: 1. EDRMS 1U (Electronic Recordkeeping - EDRMS 101) OR any Introductory-level course. EDRMS 1U is strongly recommended. 2. SPRMDD 1U (SharePoint for Information Management Professionals, Deep Dive) OR Strong SharePoint knowledge of Libraries, Columns, Content Types, Document Sets, Permissions

Did you know that all EDRMS (**E**lectronic **D**ocument/**R**ecords **M**anagement **S**ystem) solutions are fundamentally similar? The only difference is the recordkeeping software. You'll have to bring together two very different technologies, namely SharePoint and the recordkeeping software. This course will teach you everything you need to know about EDRMS in order to achieve recordkeeping compliance for your SharePoint content, and prove it! Learn how to configure SharePoint, the three key performance indicators of any EDRMS project, how to handle case records, and quantify key internal project numbers that will drive the project throughout its lifetime. Hear about the two lethal threats to any EDRMS project, and how to avoid them. And you'll also understand why you need to reconfigure your retention schedule in order to support the recordkeeping software. This course is designed and delivered by **Bruce Miller**, author, independent consultant, and leading expert in electronic recordkeeping, and author of "*Managing Records in SharePoint*". Learn from someone who speaks your language, and will simplify SharePoint to what you need to know.



Learning Objectives

Upon completion of this workshop, participants will be able to:

- Understand the language and fundamental concepts of a modern EDRMS project
- Avoid the two lethal threats to any EDRMS Project
- Measure and prove recordkeeping compliance
- Clearly and unambiguously define the roles of RIM and IT participants
- Learn why your retention schedule must be altered to support EDRMS
- Deploy a suitable SharePoint information architecture
- Handle case records properly
- Know how to capture and manage email as records
- Automate the recordkeeping processes

Who Will Benefit

Any RIM or IT professional with any role in delivering a records-compliant SharePoint.

Takeaway Tools

Course materials include a terminology dictionary, and feature summary/quick reference.

Certification Credits

IGP	14 (ARMAIGP2020_00070)	CRM	7 (2020101926811)
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Testimonials

"I loved the performance measure aspect, and 20 suggested decisions. This was worth the cost of the course alone."

"I really liked the presenter. He engaged the attendees and asked thought-provoking questions that generated some lively conversations."

"This was one of the most engaging and informative seminars I can remember attending. I got a lot of great takeaways and can enthusiastically tell my employer that this was a productive use of my time and training dollars."

"Thank you! This course hit the nail on the head – it touched on many of the issues that I see in the workplace and provided me with the guidance and affirmation that will help me to manage these issues. Awesome seminar!"

Instructor

Bruce Miller, MBA, IGP is a world leading expert on electronic recordkeeping. He is an independent consultant, an author, and an educator. Widely regarded as the inventor of modern electronic recordkeeping software, he pioneered the world's first commercial electronic recordkeeping software in 1989. In 1997 he achieved the world's first e-Records software certification against the US DoD 5015.2-STD standard, and has since presided over several successful software certifications. In 1999 he developed the world's first e-Records software **engine** for business software. That year he received ARMA Canada's National Capital Region's **Ted Ferrier Award of Excellence** for his contribution to the field of records management. Bruce's software was the first technology in the world to be certified against the revised 5015.2 June 2002 standard. In 2002 his company was acquired by IBM, where he served for three years as IBM's global e-Records Strategy and Business Development Executive. At IBM he was honored as a *Technical Leader*, one of only 439 out of 360,000 IBM employees. Mr. Miller is the recipient of the prestigious 2003 **Emmett Leahy Award**, considered the highest international recognition given to professionals in the field of information and records management. His book *"Managing Records in Microsoft SharePoint 2010"* was an ARMA best seller, and the second edition was released in October 2015. Bruce holds a Diploma in Electronics Engineering Technology, a Masters in Business Administration from Queen's University, and is a certified Information Governance Professional. Throughout his career, he has founded 4 companies:



Provenance Systems
Tarian Software
[RIMtech](#)
[Catalyst IG Tools](#)

World's first electronic records software
World's first reusable electronic recordkeeping engine
Electronic records education and consulting
Specialty EDRMS deployment tools for Microsoft SharePoint

Course Topics

Topic	Description
Recordkeeping Fundamentals	Learn the essential principles, language and concepts of records management such as declaration, disposition versus deletion, classification, qualification, and more. What does “compliance” really mean?
SharePoint IA	Learn a SharePoint Information Architecture (IA) that will support recordkeeping compliance, and the role of the metadata within that architecture. Learn how SharePoint sites, libraries, content types, columns are utilized.
Key Success Measures	Learn the (3) key measures that will objectively quantify and prove that your project is in fact records-compliant.
The Retention Schedule	Understand why your existing retention schedule will have to change, and how to adapt it for ERMS usage.
Proving Compliance	How do we measure, and prove, we have achieved recordkeeping compliance?
EDRMS By the Numbers	Every EDRMS project has several important internal numbers that will drive the scope/scale of the project, level of effort, duration, and more. Learn to identify your project’s numbers, and use these numbers to manage your records successfully.
Case Records	The single biggest point of failure in most EDRMS projects. Over 60% of all records are case records. Learn how they must be treated differently, how to deploy them in SharePoint, how disposition is handled with them, and how to manage them properly.
The Two Lethal Threats	Understand the two lethal threats to an EDRMS project, and how to avoid them.
Email	A good proportion of corporate email are records. Learn how to identify the email records, then how to capture them in order to manage them as records.
SharePoint Essentials	How much does the RIM professional need to know about SharePoint? Plenty! Learn the important basics necessary to fully understand EDRMS.
The 3 Key Roles	Understand, and clearly articulate, the roles of the three key players in any EDRMS project. The RIM professional, the IMA (Information Management Administrator), and the IT team. What do they do, and how much do they need to contribute?
Records Automation	Compliance comes from the organization, not from end users. Learn why records automation is critical to a successful records-compliant deployment of SharePoint.

Advantages of RIMtech Training

- ✓ 100% vendor neutral content. No ties to products or services providers.
- ✓ Instruction by **Bruce Miller**. Learn from, and interact with, the top expert in electronic recordkeeping.
- ✓ We understand records management. We speak your language.
- ✓ We understand IT. We speak your language also!
- ✓ We simplify complex technology so you can understand it.
- ✓ More than just consulting. [Catalyst IG Tools](#) – use the world’s only specialized tools for EDRMS deployment.
- ✓ Live instruction – not pre-recorded.
- ✓ Real-world examples and experience from actual projects.
- ✓ The very latest in technology, techniques, and methods.
- ✓ Best practices, developed by RIMtech.
- ✓ Engaging, dynamic, interactive instruction. Exercises to facilitate learning.
- ✓ You get to keep materials and tools following completion.
- ✓ Access to full session recording
- ✓ CRM/IGP credits for all courses.
- ✓ Official Completion Certificate.

Registration Form (1 form per participant)				Class	EDRMS 1U
Mr/Ms/Mrs.	Name			Title	
Organization			Dept.		
Address					
City		State/Prov	Zip/PostCode	Country	
Telephone		Email			
Payment Method					
Please Bill Credit Card		<input type="checkbox"/> Visa	<input type="checkbox"/> Mastercard	<input type="checkbox"/> Amex	
Name on Card					
Card Number			Expiry Date (YY/MM/DD)	CCV	
Signature					
<input type="checkbox"/> Cheque, Payable to RIMtech Inc.		<input type="checkbox"/> Invoice, P.O. # (Attach P.O.)			

Five Ways to Register & Pay	
Online	Go to the appropriate class page under Training & Education. Select the class, then pay via PayPal or credit card
Telephone	Call Natalie Arruda at 343-572-8533 to give your credit card details over the phone.
Email	Complete this form and scan it to PDF, then email it to us at natalie@rimtechconsulting.com
Cheque	Complete this form and enclose a cheque. Mail to RIMtech Inc., 50 Argue Drive, Ottawa, On Canada K2E 6S1
Purchase Order	Complete this form, include Purchase Order, scan to PDF, then email to us at natalie@rimtechconsulting.com

Electronic Recordkeeping – EDRMS 101	Price	
	Regular	ARMA Member
	US \$800	US \$700
Applicable Taxes	Outside Canada	none
	AB, SK, BC, MB, NT, QC, NU, YT	5%
	ON	13%
	NB, NL, NS, PE	15%

Technology Requirements

1. Reliable, stable high-speed Internet connection
2. Computer/laptop with a hands-free microphone (headset, or built-in)
3. Zoom App available at <https://zoom.us/download> (downloads automatically upon first meeting sign-in)
4. Camera optional but recommended
5. Printer to print out course exercise materials (highly recommended)

Terms and Conditions

This is a summary only. See <https://www.rimtechconsulting.com/terms-conditions> for our detailed Terms and Conditions.

1. **Equipment Requirements.** Each participant is responsible for the technology requirements above in order to participate successfully in any RIMtech online class or event.
2. **No Recordings.** Sessions are not recorded, to protect the privacy of participants.
3. **Class Materials.** Participants will receive all class materials in electronic form. Materials will be posted to a restricted page of RIMtech's website for that particular class.
4. **No-Shows.** If a participant fails to attend a class without a notification of cancellation, no refund will be issued. RIMtech will make the class materials available for that participant.
5. **Payment.** Payment, or a Purchase Order, must be received by the class date. All invoices are due within 30 days.
6. **Participant Contact.** We require the name, email addresses, and telephone number of each participant prior to the start of each class.
7. **Participant Substitution.** A participant may be substituted at any time, by contacting natalie@rimtechconsulting.com.
8. **Participant Cancellation.** To cancel, you must notify us 5 days prior to the class date. The class fee will be refunded less a 10% administrative fee. If cancellation is received later than 5 days prior to class start date, participant may nominate a substitution, or RIMtech will issue a credit voucher for the full amount of the class, redeemable for 1 year against any class of equal or lesser value.
9. **RIMtech Cancellation.** RIMtech reserves the right to cancel any class for any reason, such as a failure to reach the minimum class registration size, instructor illness, etc. In such an event, RIMtech shall refund the full registration fee paid. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
10. **RIMtech Postponement.** RIMtech reserves the right to postpone/reschedule any class for any reason and will, in such an event, work with registrants to find a mutually acceptable reschedule date. If such a date is not acceptable to any registrant, a full refund will be issued. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
11. **Liability.** RIMtech assumes no liability for changes in course dates or content.
12. **Currency.** All fees are in US dollars.



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