

State of the Art Electronic Recordkeeping Techniques & Technology

EDRMS Project Management - Comprehensive

Instruction by Bruce Miller IGP, MBA

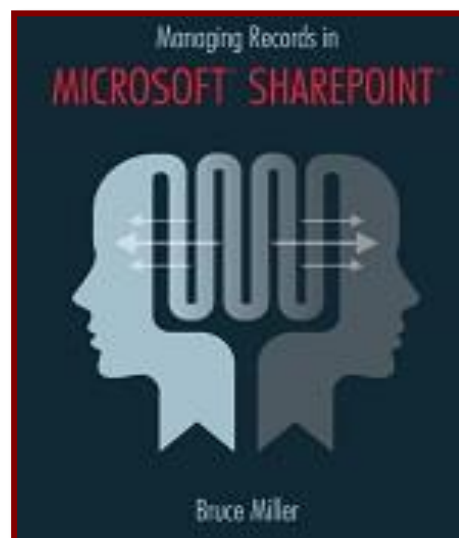
Duration
16 hours (2 days)

PM2U

RIMtech Public Online Courses are scheduled periodically and open to anyone. Attendance is limited to optimize the learning experience.

Designed for IT and RIM Professionals, or project management specialists, this two-day course is an intense, "how-to" workshop-oriented treatment of managing an Electronic Document & Records Management System (EDRMS) project. Based on RIMtech's standardized EDRMS project model, you'll learn how to assign resources, establish a leadership team, estimate project costs, make all necessary critical decisions, conduct a proof of concept, and manage the project from concept through to enterprise-wide deployment. 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*". This course is highly interactive. In team exercises you'll apply your new knowledge and insight to develop an advanced, sophisticated project model for a hypothetical organization that specifies resources, duration, and costs, including migration from a legacy system, integration with a business system, and even including an end user adoption plan.

Prerequisites → EDRMS – Comprehensive, or SharePoint EDRMS – Comprehensive.



Learning Objectives

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

- Allocate the right quantities and types of human resources to develop and deploy the solution
- Define all the necessary detailed work tasks, their duration, and assigned resources
- Learn how to utilize a standardized project model, and adapt it to your particular organization
- Make the 20+ necessary critical decisions every EDRMS demands
- Design a repeatable post-pilot deployment plan for full enterprise deployment
- Organize a regime of business units as the basis for project planning
- Develop a high-level GANTT chart to track project completion
- Define types and quantity of training required
- Define a project management team with roles, responsibilities
- Learn how to conduct an effective Pilot/Proof of Concept
- Develop an effective testing and validation plan
- Plan for an integration of an existing business system with the EDRMS
- Plan for a migration of data from a legacy system
- Discover "Lessons Learned" from real-world projects

Who Will Benefit

All project stakeholders will benefit from this workshop, including Records/Information Management professionals, IT managers and specialists, project managers, compliance officials, and senior management.

Takeaway Tools

Participants are supplied with all course materials, including a reusable project model template.

Certification Credits

IGP	18 (ARMAIGP2020_00059)	CRM	14 (2021010726800)
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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.



Course Topics

Topic	Description
Resource Utilization	Define and track the human resources and skillsets required. Allocate in-house versus external resources. Assign appropriate effort levels to each resource.
Work Tasks	Define all the tasks that need to be scheduled, and allocate an effort level for each.
The Project Model	Utilize a standardized EDRMS project management model designed by Bruce Miller. Adapt it to your particular project characteristics.
Critical Decisions	Make the 20+ critical decisions required of every EDRMS solution.
Foundation & Implementation	Plan all the one-time tasks and effort levels up to the pilot (first usage) of the system. Includes foundational tasks and the initial development and pilot phase.
Deployment	Define the repeatable work tasks, resources, and effort level required for post-pilot deployment across the entire organization.
Business Unit Organization	Decompose the organization into business units, as the basis for project planning and effort estimation. Track progress through the organization.
GANTT	Develop a high-level GANTT chart to predict project completion.
Project Costs	Develop a realistic cost estimate/projection for project years 1 to 3.
Training	Define what types of training will be required for which users, and the duration and cost of such training.
Project Management	Decide who will lead and drive the project, and take responsibility for the outcome. Define an effective working project team with well-defined roles and responsibilities.
Pilot	Design an effective pilot (Proof of Concept) project to validate the system meets business requirements.
Testing and Validation	Design an effective system testing regime that validates full proper operation of the system.
Case System Integration	Plan an integration between the EDRMS and an existing business system (Case System Integration, or CSI).
User Adoption Plan	Design and deploy a User Adoption Plan, based on proven change management techniques, to increase user adoption.
Migration	Plan a migration of data from a legacy system to the new EDRMS
Lessons Learned	Hear valuable lessons learned from real-life EDRMS deployments in government and corporate sectors.

Advantages of RIMtech Online Public Courses

- ✓ 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.
- ✓ Live instruction – not pre-recorded.
- ✓ Real-world examples and experience from actual projects.
- ✓ The very latest in technology, techniques, and methods.
- ✓ Engaging, dynamic, interactive instruction. Exercises to facilitate learning.
- ✓ You get to keep materials and tools following completion.
- ✓ CRM/IGP credits for most courses.
- ✓ Official Completion Certificate.

Registration Form (1 form per participant)				Class	PM2U
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

EDRMS Project Management - Comprehensive	Price	
	Regular	ARMA Member
	US \$1,200	US \$1,000
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. **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.
3. **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.
4. **Payment.** Payment, or a Purchase Order, must be received by the class date. All invoices are due within 30 days.
5. **Participant Contact.** We require the name, email addresses, and telephone number of each participant prior to the start of each class.
6. **Participant Substitution.** A participant may be substituted at any time, by contacting natalie@rimtechconsulting.com.
7. **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.
8. **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.
9. **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.
10. **Liability.** RIMtech assumes no liability for changes in course dates or content.
11. **Currency.** All fees are in US dollars.



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