

State of the Art Electronic Recordkeeping Techniques & Technology

SharePoint® For Information Management Professionals

Duration
8 hours (1 day)

Instruction by Bruce Miller IGP, MBA

SPRM 1U

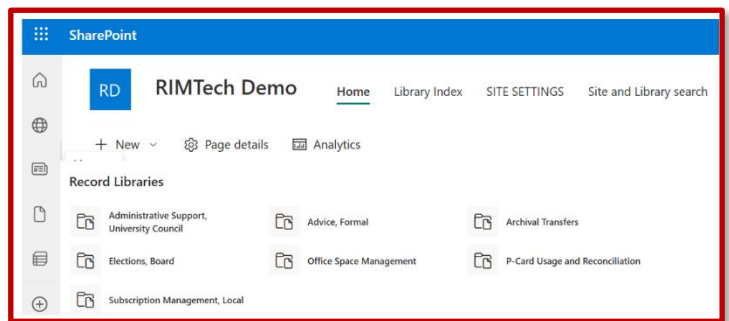
RIMtech Public Online Courses are scheduled periodically and open to anyone. Attendance is limited to optimize the learning experience. We assume your content management platform will be Microsoft SharePoint. All courses are fully and equally applicable to any of the (5) popular records management software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

This is an
Introductory
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 (Electronic Document/Records Management Systems) 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 |

Congratulations – you’re going to be the records administrator for SharePoint! Eventually, SharePoint will become an EDRMS (Electronic Document/Records Management System), with some recordkeeping software applying records control to SharePoint content. No matter what recordkeeping software you ultimately deploy, you’re going to need a very specific minimum level of competence with SharePoint. Forget general-purpose SharePoint training – you’ll learn things you won’t likely need, like web pages, workflows, etc. Take this course to learn **exactly** what you’ll need to know, no less and no more. You’ll need to know basic user level, plus administrative document management skills to create and manage Libraries, Content Types, Document Sets, Columns, Lists, List Views, etc. These are the specific skills you’ll need to deploy any recordkeeping software for SharePoint, to understand essential SharePoint Information architecture in an EDRMS setting, and to work with your IT team. 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 key SharePoint concepts such as sites vs libraries vs folders, and how metadata is key to SharePoint,
- Comfortably understand and operate the fundamentals of SharePoint document management
- Understand, create and manage Libraries, Content Types, Document Sets, Columns, Lists, List Views
- Upload documents to Libraries
- Apply version management to documents
- Deal with SharePoint's notorious "Missing Mandatory Metadata" deficiency
- Leverage Document Sets to properly manage case records
- Conduct simple vs advanced searches
- Understand and avoid the (2) key SharePoint limitations
- Understand the basics of permissions and how to apply

Who Will Benefit

Any RIM professional with any role in managing records in SharePoint.

Takeaway Tools

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

Certification Credits



7 CEUs



7 CEUs



8 CEUs

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 |
|--|--|
| EDRMS Fundamentals | |
| 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. |
| 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. |
| SharePoint Topics | |
| SharePoint Fundamentals | Key concepts and language of SharePoint. Sites, libraries, folders, etc. |
| SharePoint IA | Learn a SharePoint Information Architecture (IA) that will support recordkeeping compliance, and the role of the metadata within that architecture. |
| Libraries | Everything you need to know about libraries . This is the key to understanding SharePoint. Learn how to create a library and configure its various behaviors. When (and when not to) use folders. |
| Content Types | A content type is the mechanism by which metadata is assigned to libraries. Understand how they work, and develop a strategy for content types. |
| Version Management | Understand minor and major version management strategies, and how version management impacts records compliance. |
| Submitting Documents | Learn the many ways to load a document into SharePoint, and the pros/cons of each. Experience and understand the “Missing Mandatory Metadata” phenomenon, and how to deal with it. |
| Permissions | An examination of how permissions work, and how to build “fences” around sensitive records. |
| Metadata | Metadata is key to SharePoint. Learn why. SharePoint calls metadata “columns”. Learn the different types of columns and their characteristics. |
| Searching and Retrieval | How to use the various Search capabilities to find documents. Learn search capabilities, strategies, views, etc. Understand the difference between searching and filtering. |
| Critical SharePoint Limitations | Learn the two critical SharePoint limitations that affect recordkeeping, and how to overcome them. |

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 | SPRM 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 |

| SharePoint® For Information Management Professionals | 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.



www.rimtechconsulting.com

Natalie Arruda

natalie@rimtechconsulting.com

343-572-8533

Bruce Miller

bmiller@rimtechconsulting.com

613-795-3072