

State of the Art Electronic Recordkeeping Techniques & Technology

SharePoint® For Records Managers - Comprehensive

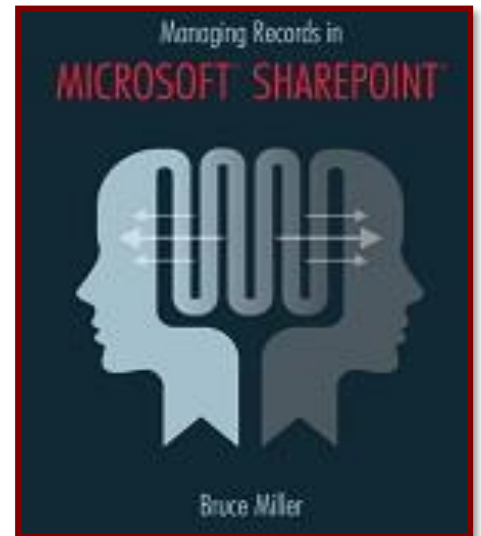
Instruction by Bruce Miller IGP, MBA

Duration
16 hours (2 days)

SPRM 2V

RIMtech Private Online Courses are delivered on-demand to a single organization, with up to 10 participating employees. Content is focused/tailored to your organization, and your particular requirements/interests.

Learn what you need to know about Microsoft SharePoint in order to successfully manage an **Electronic Document & Records Management System (EDRMS)** project based on SharePoint in this intense 2-day workshop. This course is laser-focused on only those aspects of SharePoint that you, the RIM professional, need to know about SharePoint. It avoids all the topics from typical off-the-shelf SharePoint training that you don't need such as apps, websites, workflows, etc. You need to substantially influence how SharePoint is configured and deployed, without being a SharePoint expert. This course is not a hands-on SharePoint experience, rather you will learn the terms, concepts, principles, capabilities and limitations of SharePoint. The instructor will guide you through SharePoint using the live product as well as substantial supporting materials. This training will teach you everything you'll need to work closely and confidently with your IT team and SharePoint administrators. Most importantly, you'll be able to clearly define your role and positively influence SharePoint architecture and configuration to support downstream recordkeeping compliance. The goal is to become confident and competent in using SharePoint, and heavily influence its configuration, while adhering to solid recordkeeping principles and compliance. 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. Work on prescribed team exercises to tackle real-life deployment challenges and clear project-threatening roadblocks. In simulated hands-on software exercises, you'll apply your new knowledge and insight to configure SharePoint and advise on deployment. You'll learn to understand the product well enough to participate with confidence in SharePoint configuration, architecture, and deployment decision-making with your IT team.



Learning Objectives

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

- Understand the structure of SharePoint (Sites, Libraries, Lists)
- Apply version management to documents
- Use various methods to load documents into SharePoint
- Deal with the "Missing Mandatory Metadata" phenomenon
- Leverage Document Sets to properly manage case records
- Understand the ramifications of moving a document from one location to another
- Deploy different behaviors for case vs administrative records
- Define and deploy metadata suitable for recordkeeping compliance
- Use effective search and retrieval strategies
- Define the role of the RIM professional and IMA
- Leverage Onedrive to move documents into SharePoint
- Design and generate useful reports
- Apply permissions to manage sensitive records
- Develop workarounds for internal limitations
- Apply email management to SharePoint

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

IGP	18 (ARMAIGP2020_00071)	CRM	14 (2021020126812)
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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
SharePoint Versions	The difference between cloud (SharePoint Online) and on-premise versions of SharePoint
SharePoint Structure	Sites, Libraries, Lists and URLs for each. How SharePoint is organized and where documents live.
Libraries and Folders	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.
Document Versioning	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.
Document Sets	How to use document sets to manage case records.
Case vs Administrative Records	The behavior of SharePoint must be completely different for case and administrative records. Learn the differences and how to configure SharePoint appropriately.
Preservation Copies	A new technique for managing records in SharePoint. How this impacts SharePoint configuration.
Moving and Deleting Documents	One of the least understood aspects of SharePoint. What happens when you move a document from one library/folder to another? What happens behind the scenes when you delete a document?
Case vs Admin Metadata Fields	Metadata is crucial. Understand how to define it, and how to leverage metadata to achieve records compliance. Learn the critical differences between case and administrative metadata, and retention triggers.
Permissions	An examination of how permissions work, and how to build "fences" around sensitive records.
Metadata in SharePoint	The difference between business and compliance metadata fields (SharePoint Columns). How to create metadata fields necessary for records compliance.
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.
The RIM Role	Understand the important role the RIM/IG professional plays in SharePoint design, setup, configuration, and maintenance.
The IMA Role	The IMA (Information Management Administrator) is a secondary-level role to the RIM professional. Understand duties/responsibilities of the IMA in daily SharePoint operations.
Metadata Mapping	A high-level overview of how to interview business units to define necessary metadata for a successful SharePoint deployment.
Critical SharePoint Limitations	Learn the two critical SharePoint limitations that affect recordkeeping, and how to overcome them.
OneDrive	How Microsoft OneDrive interacts with SharePoint, and how it can facilitate document submission, and benefit records compliance.
Email in SharePoint	Emails can arguably be the most important/sensitive records of all. Understand how to store them in SharePoint, critical limitations, and options for better email management.
Report Writer	Use Power BI to design and generate useful reports

Advantages of RIMtech Online Private Courses

- ✓ Content focused/tailored to your organization only, and your particular requirements/interests
- ✓ 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 class)				Class	SPRM2V
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 Records Managers - Comprehensive	Maximum Participants		
	3	6	10
Price	US \$3,000	US \$4,500	US \$6,000
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, 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. **Class Size Reduction.** Participant cancellations may result in a reduction in class size to a lower price level (e.g. from max 6 to max 3). In this case the difference in price between the original and the new class size will be refunded.
8. **Buyer Cancellation.** To cancel, you must notify us 10 days prior to the class date. The class fee will be refunded less a 10% administrative fee. Any cancellation received later than 10 days prior to class start date shall be liable for the full class fee.
9. **RIMtech Cancellation.** RIMtech reserves the right to cancel any class for any reason and will, in such an event, refund the full class cost. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
10. **Buyer Postponement.** RIMtech will work with registrants to find a mutually acceptable reschedule date. If such a date is not acceptable to the buyer, a full refund will be issued less a 10% administrative fee.
11. **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 the registrants, a full refund will be issued. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
12. **Liability.** RIMtech assumes no liability for changes in course dates or content.
13. **Currency.** All fees are in US dollars.



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