RIMtech Online Training
Public Course

State of the Art Electronic Recordkeeping Techniques & Technology

Microsoft Purview™ The REAL Records Management – For the IM Professional

Instruction by Bruce Miller IGP, MBA

Duration
8 hours (1 day)

PurRMIM 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.

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 Prerequisities: 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

This is an
Introductory
Course ➡

Tired of all the Purview training videos? Me too! Typically just a stream of what Purview can do. Not very helpful! Purview is a very challenging product to learn and deploy in a genuine records-compliant setting. Separate the marketing hype from the recordkeeping reality with this ground-breaking course from someone who truly understands records management, and is NOT trying to sell you the product. Purview has its own unique language, completely foreign to records management, and here you'll learn how to speak it. Understand Purview's critical shortcomings and limitations, with effective workaround strategies and methods. Learn how to deploy Purview safely to achieve genuine recordkeeping compliance. This course is not a hands-on product training experience. Nor is it a Webinar-like stream of "What Purview can do". Instead, you'll learn how to translate its language to real-world records management, what works well and not so well, what to avoid, practical workarounds for serious limitations, and how to achieve, then prove, genuine recordkeeping compliance. This course is designed and delivered by **Bruce Miller**, author, educator, independent consultant, leading expert in electronic recordkeeping, and author of "*Managing Records in Microsoft SharePoint*". He has no stake in Purview sales or services, and calls it as he sees it. Bruce will navigate you through the complexities of Purview in simple, understandable recordkeeping terms you can relate to. You'll finally be able to understand Purview and learn what it really takes to deploy it in a real-life electronic recordkeeping project.
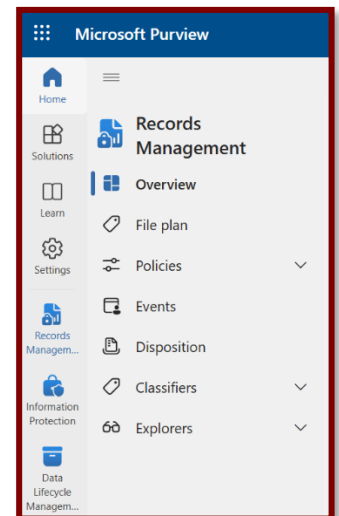
Learning Objectives

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

- Speak Purview's recordkeeping language, and translate it to traditional recordkeeping language.
- Fully understand Purview's limitations and apply effective strategies and workarounds.
- Learn the challenges of handling case records within Purview
- Understand why AI is not necessary to achieve compliance.
- Measure and prove recordkeeping compliance.
- Understand why Auto-Apply is the only way to safely apply retention in Purview.

Who Will Benefit

All project stakeholders will benefit from this course, 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 diagrams and summaries of Purview capabilities.

Certification Credits

IGP	14 (ARMAIGP2020_00077)	CRM	7 (2020111626794)

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 **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	World's first electronic records software
Tarian Software	World's first reusable electronic recordkeeping engine
RIMtech	Electronic records education and consulting
Catalyst IG Tools	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** (**I**nformation **M**anagement **A**dministrator), 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.
Purview Records Management Topics	
The Language of Purview Records Management	Learn to speak Purview! Purview has its own unique language for records management. Translate it to normal "Records-speak". Understand Policies, Labels, Document Understanding Models, Adaptive Scopes, Refinable Strings, Locations, Auto-Apply, Explicit vs Implicit Label Assignment, Crawled vs Managed Properties, KQL, Trainable Classifiers, and more.
The Purview Paradox	Purview has records management upside down! Where does compliance come from, the organization, or the users?
Proving Compliance with Purview	How do we measure, and prove, we have achieved recordkeeping compliance?
The Automation Obligation	Discover why "Auto-Apply" is the **ONLY** possible way to achieve recordkeeping compliance with Purview.
Purview NoGo Features	Some Purview recordkeeping features are compliance-killers. Learn what they are and how to avoid them.
Purview vs Competition	How does Purview hold up in a knock-down comparison against its market competitors?
Case Records	Case records (records with event-driven retention triggers) is the biggest single shortcoming of Purview. Understand the problem, and what to do about it.
Purview AI for Records	Artificial Intelligence will <u>not</u> save you. It is not necessary for records compliance. Understand Purview AI limitations and why you do not need it.
Disposition Limitations	Disposition has its limits! Disposition review is unsafe – learn a safe approach for effective disposition review.
Retention Labels	Retention labels can both help and harm your compliance. Learn how to avoid the dangers, and how to avoid the dreaded "competing retention rules".
Purview Policies	Purview has two very different meanings of "Policy". By understanding the differences, you'll know which type to use and when
The M365 Substrate	Yes – you really do need to understand the M365 substrate. Compliance is impossible without it. Learn to find it, how it works, how you need to use it, and the notorious "refinable string" limitation.
The File Plan	This is the retention schedule. Understand how it compares to a conventional retention schedule, and how to work within its limitations.

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	PurRMIM 1U
Mr/Ms/Mrs.	Name		Title	
Organization		Dept.		
Address				
City	State/Prov	Zip/PostCode		Country
Telephone	Email			
Payment Method				
Please Bill Credit Card	☐ Visa	☐ Mastercard	☐ Amex	
Name on Card				
Card Number		Expiry Date (YY/MM/DD)		CCV
Signature				
☐ Cheque, Payable to RIMtech Inc.	☐ 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

Microsoft Purview™ The REAL Records Management – For the IM Professional	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. Zoom App available at https://**zoom**.us/**download** (downloads automatically upon first meeting sign-in)
3. Camera optional but 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.