

State of the Art Electronic Recordkeeping Techniques & Technology

Microsoft 365™ Recordkeeping Functionality - Basic

Duration
8 hours (1 day)

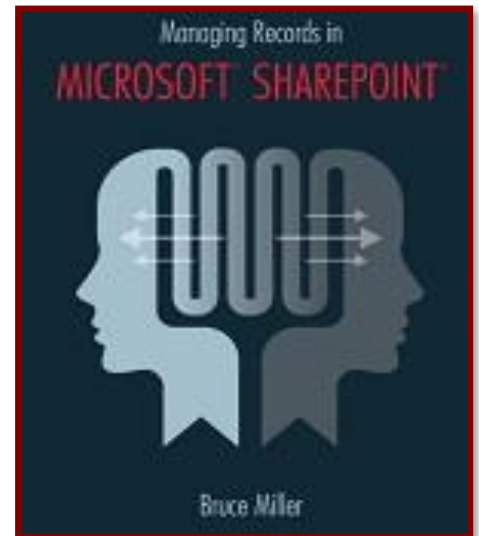
Instruction by Bruce Miller IGP, MBA

M365 RM1U

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

Microsoft 365

Microsoft 365¹ has all the recordkeeping features needed for full compliance. But how do you use them? The jargon is unusual, the features are complicated. What's a "Label"? What's a Workload? Managed versus Crawled properties? What is KQL? What is a Preservation Copy? What is a Trainable Classifier? Why are there 2 types of record? Why do retention rules need "precedence"? What are the different meanings of "Policy"? This comprehensive "How to" treatment of M365 will sort out and simplify this complex jargon and teach you what you need to know to achieve recordkeeping compliance. This course is not a hands-on product training experience, rather you'll learn the language, concepts, principles, capabilities and limitations of the recordkeeping compliance features of M365. This course will be enormously beneficial either *before* or *after* you've completed any hands-on M365 training. You'll learn its unusual language and translate it to understandable "records-speak". 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*". Bruce will navigate you through the complexities of M365 in simple, understandable recordkeeping terms you can relate to. You'll fundamentally understand the product and learn what it really takes to deploy it in a real-life project.



Learning Objectives

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

- Fully and effectively utilize the native recordkeeping capabilities of M365 without the use of third party recordkeeping software.
- Understand the different compliance capabilities of the various M365 products (Exchange, OneDrive, SharePoint, etc.)
- Apply proper handling of case records in M365
- Modify your retention schedule for use with M365
- Identify and avoid the 2 lethal threats to an EDRMS project
- Apply retention rules to records in M365
- Understand how and when preservation copies of records are created

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 diagrams and summaries of M365 capabilities.

Certification Credits

IGP	14 (ARMAIGP2020_00077)	CRM	7 (2020111626794)
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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!"

¹ This course covers the Enterprise License level **E5** only.

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
The Science of Electronic Recordkeeping	Learn the essential principles all stakeholders need to understand in order to successfully plan and deploy an EDRMS project. Includes the language and concepts needed for planning and implementation such as declaration, disposition versus deletion, classification, qualification, and more. What does "compliance" in an EDRMS really mean?
Performance Metrics	Learn how to measure and analyze the 3 EDRMS performance metrics to prove your system is meeting compliance requirements.
The 2 EDRMS Threats	Understand the 2 lethal threats to an EDRMS, and how to avoid them.
A Software-Ready Retention Schedule	Understand why an ordinary retention schedule is inadequate for an EDRMS, and how to modify your retention schedule to make it software-ready.
Essential M365 Principles and Concepts	Workloads, policies versus labels, policy types, Crawled vs Managed properties, etc.
The File Plan	Relationship to retention schedule, labeling, limitations.
Retention and Deletion Policies	When, why and how to use a policy versus a label. Policy confusion, limitations of policies.
Retention Labels	Label policies, label types, label settings, automatic label assignment, labels vs. workloads, label defaults
Effective Retention	Retention rules can compete with one another. Determine "Effective" retention under competing retention rules.
Case Records Handling	Typically 60%+ of your records are event-driven (case) records. Learn how to manually handle case records properly, and explore an automated alternative.
Preservation Copies	Understand the creation and flow of Preservation Copies for different workloads, and implications on compliance.
Records Declaration	Records vs. Regulatory records. Non-Records versus "records".

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	M365 RM1U
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

Microsoft 365™ Recordkeeping Functionality - Basic	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. **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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