

# RIMtech Online Training

## Private Course

### State of the Art Electronic Recordkeeping Techniques & Technology

#### Information Management Administrator – Roles and Responsibilities

Duration  
4 hours

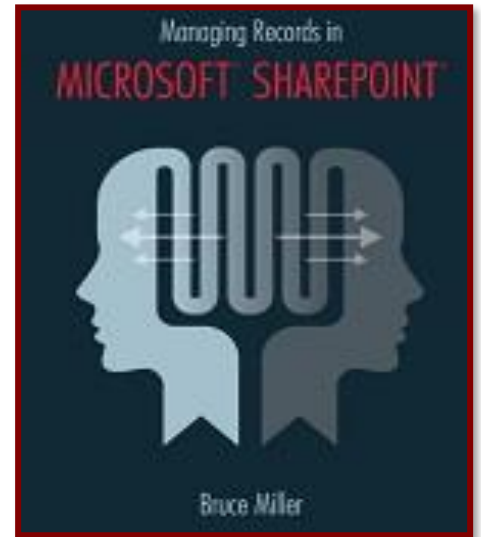
Instruction by Bruce Miller IGP, MBA

IMAV

*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.*

The Information Management Administrator (IMA) plays an important supporting role to the RIM professional. The IMA carries out critical supporting recordkeeping functions within a given department, in support of the organization's overall recordkeeping compliance program. They have a specific role in the ongoing daily usage and maintenance of the EDRMS (Electronic Document/Records Management System), by supporting end users, and feeding critical performance data to the RIM professional. 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*". After completing this course you'll be able to define the role of an IMA, train an IMA, and estimate the time commitments required for their contribution.

Prerequisite – *Electronic Recordkeeping 101*, or any EDRMS course



#### Learning Objectives

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

- Understand the critical differences in behavior of case vs administrative records in an EDRMS
- Plan an IMA Training course
- Learn how to create new cases
- Measure and report on EDRMS Key Performance Indicators
- Handle physical records within the department
- Assign permissions to Shared categories
- Handle supersedence of records

#### 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 several reusable implementation tools that can be applied to your own organization's EDRMS project.

#### Certification Credits

IGP	7.5 (ARMAIGP2020_00076)	CRM	4 (2021011426793)
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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
<b>Introduction to Cases</b>	What is a records case category, and how they differ from administrative categories in the retention schedule
<b>Creating New Cases</b>	How to create new cases. Rules, tips, and guidelines
<b>Entering Event Dates</b>	When and how to enter closing case event dates
<b>Physical Records Management</b>	How to create, assign, loan and return physical records including folders and boxes
<b>Performance Indicators</b>	How to measure and report specified Key Performance Indicators (KPIs).
<b>Permissions</b>	Understand Common vs. Shared categories, and how to assign visitor and contributor permissions to business unit users to shared categories
<b>Supersedence</b>	How to properly enter the retention triggers for superseded records

## 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	IMAV
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	
<b>Online</b>	Go to the appropriate class page under Training & Education. Select the class, then pay via PayPal or credit card
<b>Telephone</b>	Call Natalie Arruda at 343-572-8533 to give your credit card details over the phone.
<b>Email</b>	Complete this form and scan it to PDF, then email it to us at <a href="mailto:natalie@rimtechconsulting.com">natalie@rimtechconsulting.com</a>
<b>Cheque</b>	Complete this form and enclose a cheque. Mail to RIMtech Inc., 50 Argue Drive, Ottawa, On Canada K2E 6S1
<b>Purchase Order</b>	Complete this form, include Purchase Order, scan to PDF, then email to us at <a href="mailto:natalie@rimtechconsulting.com">natalie@rimtechconsulting.com</a>

Information Management Administrator Roles and Responsibilities	Maximum Participants		
	3	6	10
Price	US \$1,000	US \$1,500	US \$2,000
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](mailto: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.



[www.rimtechconsulting.com](http://www.rimtechconsulting.com)

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