

State of the Art Electronic Recordkeeping Techniques & Technology

How to Build a Modern Software-Ready Retention Schedule - Basic

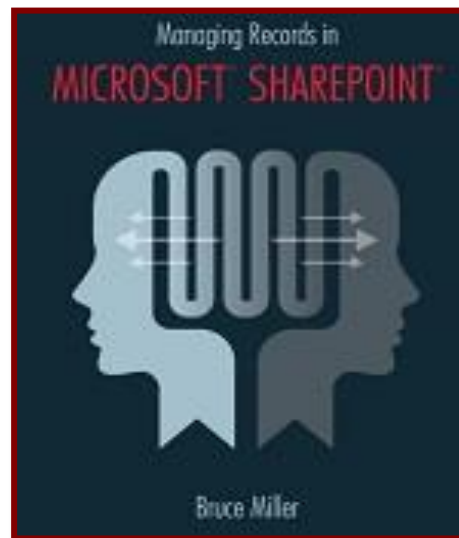
Instruction by Bruce Miller IGP, MBA

Duration
8 hours (1 day)

RRS1U

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

To fully and properly deploy a successful EDRMS (Electronic Document/Records Management System), you'll need to make your retention schedule **Software-Ready**. A software-ready retention schedule is structured to take full advantage of the recordkeeping automation you'll need to deploy for a successful EDRMS. It is vastly different from a traditional schedule. Case record categories and event data must be carefully configured, and you'll need to define and enable multiple retention rules for certain categories. And you'll need to define specific strategic metadata in support of the retention rules. In this course you'll learn how to adapt your retention schedule for a fully automated successful EDRMS deployment. 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 apply your new knowledge and insight to rework your retention schedule to make it fully compatible with any modern EDRMS or other electronic recordkeeping software.



Learning Objectives

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

- Understand the retention schedule requirements of modern recordkeeping software
- Modify a retention schedule to make it EDRMS-Ready
- Apply different forms of retention rule triggers, utilizing document metadata
- Learn how to structure a modern retention schedule in a spreadsheet
- Understand the value-based retention technique
- Learn how the retention schedule impacts EDRMS Architecture
- Deploy Rules-Based Recordkeeping
- The proper technique to define and deploy Case records
- Common vs Shared retention schedule categories
- The need for Volumetrics
- Develop effective Retention Schedule documentation
- Understand the need for multiple retention rules in a given category
- Deploy retention schedule over-rides

Who Will Benefit

Records/Information Management professionals, records analysts, IT analysts with an interest in electronic recordkeeping.

Takeaway Tools

Course materials include an effort estimation model and templates for a modern retention schedule.

Certification Credits

IGP	14 (ARMAIGP2020_00062)	CRM	7 (2020112326803)
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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
Software Requirements	What all modern recordkeeping software expects of a retention schedule
Case Records	The proper technique to handle case records
Retention Schedule Structure	The components and organization of a modern retention schedule. Spreadsheet format
Value-Based Retention	Assigning retention periods based on the value of documents
EDRMS Architecture	How the retention schedule shapes the configuration/architecture of a host EDRMS system
Rules-Based Recordkeeping	How to automate declaration and classification to eliminate user participation
Common Vs Shared	The two treatments of categories used by more than one business unit
Volumetrics	Estimating/Projecting the effort level of retention schedule usage following deployment
Documentation	How to create and maintain effective supporting documentation for a retention schedule throughout its lifetime
Multiple Retention Rules	Why, when, and how to deploy multiple retention rules within a single records category/series
Over-Rides	How and when to allow a retention schedule to be over-riden
Transcription	How to transcribe interview notes to a structured, machine-readable spreadsheet

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	RRS1U
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

How to Build a Modern Software-Ready Retention Schedule - 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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