

## SharePoint® EDRMS - Comprehensive

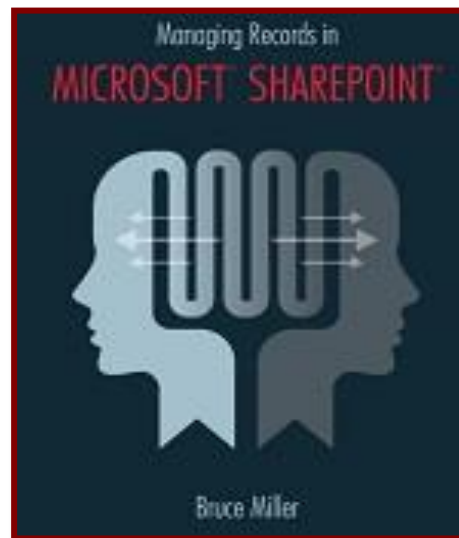
Instruction by Bruce Miller IGP, MBA

**Duration**  
16 hours (2 days)

SP EDRMS 2U

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

You've selected Microsoft M365™ with SharePoint™ as a content management platform. Perhaps you've already begun to deploy it, along with Teams™. But you've got to meet recordkeeping requirements. How can you accomplish that? Designed for IT and RIM Professionals, this two-day course will give you the answer. Learn how to turn your project into a proper **Electronic Document & Records Management System (EDRMS)** project with fully defensible, quantifiable recordkeeping compliance. Understand the features and capabilities of Microsoft's native recordkeeping software versus the leading third party products (Collabware™, RecordPoint™, AvePoint™, Gimmal™) from a genuinely vendor-neutral perspective, to confidently make the best selection for your organization. This course teaches you what you need to know regardless of which software you deploy. IT attendees will learn the essential recordkeeping science they'll need to understand, and how RIM drives Microsoft Information Architecture. RIM attendees will understand the core SharePoint concepts they'll need to know, how to work with IT to define and configure SharePoint, and how to fully automate recordkeeping within SharePoint. Grounded in solid recordkeeping principles and practical SharePoint know-how, 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*". Tackle real-life project challenges and clear project-threatening roadblocks. Make critical project decisions and apply the technology to deliver verifiable results. You'll learn to avoid common implementation mistakes, overcome barriers to user adoption, and produce a detailed project implementation plan complete with resource and budget estimates.



### Learning Objectives

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

- Understand the capabilities and limitations of (5) products for recordkeeping software for SharePoint
- Clearly define recordkeeping requirements for SharePoint
- Understand how RIM compliance shapes SharePoint Information Architecture
- Achieve full recordkeeping automation with Rules-Based Recordkeeping
- Make the optimum choice for recordkeeping software for your organization
- Configure SharePoint with appropriate metadata, libraries and folders, content types, and storage locations
- Identify and avoid common EDRMS implementation mistakes
- Learn how the IT and RIM Professionals work together to reach the goals of EDRMS
- Define and track essential SharePoint and RIM performance metrics
- Apply industry best practices for electronic recordkeeping

### 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	18 (ARMAIGP2020_00069)	CRM	14 (2020111226810)
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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>The Science of Electronic Recordkeeping</b>	Learn the seven 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 records volumetrics.
<b>Key EDRMS Performance Metrics</b>	Learn how to measure and analyze the core RIM and SharePoint performance metrics common to all EDRMS projects.
<b>Recordkeeping software capabilities and limitations</b>	Understand the recordkeeping capabilities and limitations of (4) third-party records software products as well as the native recordkeeping capability of M365. E5.
<b>Essential SharePoint Concepts</b>	What all stakeholders need to understand about SharePoint to make key decisions and deploy a successful solution
<b>Strategic Implementation Decisions</b>	Make the 20+ strategic, critical decisions every EDRMS project will demand.
<b>Software Selection</b>	Review the top-10 comparative features of the (5) records software options, and select the optimal add-in for your project.
<b>The RIM Role</b>	Understand what it takes to define, develop, and implement an EDRMS project using SharePoint, and how to keep the project healthy over its lifetime.
<b>The IT Role</b>	Understand how to configure SharePoint for recordkeeping compliance, manage email, preserve KPI minimums, and deploy recordkeeping software options.
<b>RIM Foundation</b>	Learn how to prepare the RIM foundation, including the retention schedule and physical records, for EDRMS deployment.
<b>Rules-Based Recordkeeping</b>	How to automate end-user RIM processes including declaration and classification such that end user RIM participation can be eliminated.
<b>SharePoint Configuration</b>	Understand records-compliant SharePoint information Architecture (IA) including document metadata, content types, libraries and folders.
<b>Project Resources</b>	Learn how to accurately estimate the types and quantities of human and financial resources required for successful project implementation.

## 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	SP EDRMS 2U
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>

SharePoint® EDRMS - Comprehensive	Price	
	Regular	ARMA Member
	US \$1,200	US \$1,000
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 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](mailto: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.



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

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