SharePoint Metadata for Recordkeeping Compliance –

Deep Dive

Instruction by Bruce Miller IGP, MBA

Duration
8 hours (1 day)

SPMMDD 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 a
Deep-Dive
Course

You have SharePoint Online. But have you defined custom metadata suitable for your organization? SharePoint metadata is the key to a successful SharePoint experience. However an EDRMS (**E**lectronic **D**ocument/**R**ecords **M**anagement **S**ystem) deployment is impossible without metadata, as it drives compliance. Did you know that none of the modern recordkeeping software products for SharePoint can function without essential compliance metadata? Too little metadata means you're not getting value from SharePoint, and recordkeeping cannot work. Too much leads to user complaints. A typical healthy records-compliant SharePoint deployment has an average of 14 metadata fields per library. But the user only has to enter an average of 2.1! Did you know that a modern software-ready retention schedule has to specify metadata? Attend this course to understand the value and purpose of metadata, and learn a structured methodology for defining suitable metadata for a successful compliant SharePoint 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 Microsoft SharePoint*".
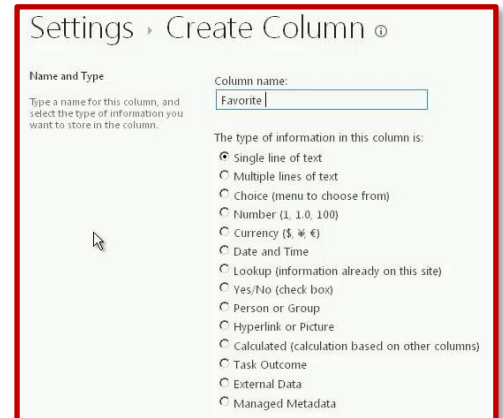
Prerequisites:

1. **EDRMS 1U** (Electronic Recordkeeping – EDRMS 101)
   or
   Any Introductory Level Course
2. **SPRM DD 1U** (SharePoint for Information Management Professionals, Deep Dive)
   or
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RIMtech

CATALYST
Information Governance Tools

Learning Objectives

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

- Understand the purpose and value of custom metadata
- Apply a structured methodology for defining appropriate metadata
- Utilize a tool for capturing and recording SharePoint metadata
- Structure metadata for case (event-driven) records
- Utilize the Catalyst IG Tools to deploy metadata automatically
- Modify the retention schedule to specify essential compliance metadata
- Conduct effective and efficient business unit interviews
- Master the use of lists and taxonomies
- Know when and where to deploy the powerful "Document Type" field
- Reliably project the total effort required to define all necessary metadata for your organization.
- Deal with SharePoint's "Missing Mandatory Metadata" deficiency

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

Course materials include an effort estimation model, sample metadata map, and reusable mapping templates.

Certification Credits

IGP	18 (ARMAIGP2020_00081)	CRM	14 (2020110226798)

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. 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
Case vs Document Fields	60%+ of all records are case (event-driven) records. Learn how metadata must be defined differently for case records.
Metadata Types	Understand which of the 14 types of SharePoint metadata to use, and when.
SharePoint IA	Learn a SharePoint Information Architecture (IA) that will support recordkeeping compliance, and the role of the metadata within that architecture.
The Catalyst IG Tools	Catalyst IG Tools have been specially developed for EDRMS deployment. Learn how the tools are used to automate the metadata deployment in SharePoint.
Compliance vs. Business Metadata	Understand the difference between non-negotiable compliance metadata and metadata for business purposes.
FileShare Trees	Generate fileshare trees to help develop effective metadata.
Business Unit Interviews	Learn how to prepare for, conduct, and document a business unit interview to define compliance and business metadata.
The Need for Speed	Defining metadata takes a lot of time, and can be arduous. Learn tips and best practices to optimize the process.
Retention Schedule Metadata	Define essential compliance metadata in your software-ready, machine-readable retention schedule.
Lists	Understand list types Choice, Managed Metadata, Person/Group, Lookup and when to use each type.
SharePoint Taxonomy	Learn the SharePoint termstore and how to manage it effectively.
The Document Type Field	A powerful special field in electronic recordkeeping, used to solve the "Two Vs" Phenomena. Learn when and how to use it to maximum benefit.
Effort Estimator	Utilize a tool (spreadsheet model) to reliably estimate the total time/effort needed to define and deploy all SharePoint metadata for your organization.

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	SPMMDD 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

SharePoint Metadata for Recordkeeping Compliance – Deep Dive	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. **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.

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www.rimtechconsulting.com

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