RIMtech Online Training
Public Course

RIMtech www.rimtechconsulting.com

State of the Art Electronic Recordkeeping Techniques & Technology

Purview Records Management for IT Professionals

*Instruction by Bruce Miller IGP, MBA*

Duration
8 hours (1 day)

M365 IT1U

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

You've been tasked with deploying Purview Recordkeeping. You've read the documentation. You understand it, but records management is new to you. Your Records Manager has that "deer in the headlights" look. How hard can it be? Don't underestimate it – attend this course to understand core records management concepts and principles, and how to apply Purview properly to achieve genuine compliance. Too many Purview deployments have failed – avoid the two common failure points. Understand Purview's critical limitations, with effective workaround strategies and methods. Learn how to deploy Purview safely to achieve genuine recordkeeping compliance. You'll also learn what ***not*** to do with Purview. This course is not a hands-on product training experience. Nor is it a Webinar-like stream of "What Purview can do". You already know what it can do. Instead, you'll learn how to deploy Purview properly from someone who understands records management, yet speaks IT. You'll discover what works well and not so well, what to avoid, practical workarounds for certain limitations, and how to achieve genuine recordkeeping compliance. 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 teach you what you need to know about records management, how to configure Purview in a recordkeeping setting, and how to deliver true recordkeeping compliance using Purview.
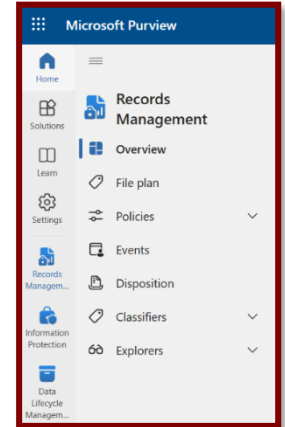
Learning Objectives

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

- Understand essential recordkeeping compliance requirements
- Understand and deal with Purview limitations.
- Understand and deploy case (event-driven) records with Purview
- Develop a suitable SharePoint Information Architecture for compliance
- Identify and avoid the 2 lethal threats to an EDRMS project
- How to measure and prove compliance
- Understand why Auto-Apply is the only way to safely apply retention in Purview.

Who Will Benefit

IT managers and specialists, project managers, records managers.

Takeaway Tools

Participants are supplied with all course materials, including diagrams and summaries of Purview capabilities.

Certification Credits

IGP	14 (ARMAIGP2020_00077)	CRM	7 (2020111626794)

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

Course Topics

Topic	Description
Recordkeeping Fundamentals	Learn the essential principles, language and concepts of records management such as declaration, disposition versus deletion, classification, qualification, and more. What does "compliance" really mean?
Performance Metrics	Learn how to measure and analyze the 3 electronic records performance metrics to prove your system is meeting compliance requirements.
Project Threats	Understand the 2 lethal threats to Purview deployment, and how to avoid them.
The Retention Schedule	Known as the "File Plan" in Purview. Purview cannot function without it. But your existing retention schedule is likely inadequate for Purview. Learn why and how how the retention schedule must be modified.
Purview Essentials	Learn Workloads, policies versus labels, policy types, Crawled vs Managed properties, etc.
The Automation Obligation	Discover why "Auto-Apply" is the **ONLY** possible way to achieve recordkeeping compliance with Purview.
Purview NoGo Features	Some Purview recordkeeping features are compliance-killers. Learn what they are and how to avoid them.
Case Records	Case records (records with event-driven retention triggers) is the biggest single shortcoming of Purview. Understand the problem, and what to do about it.
SharePoint IA	Understand a suitable SharePoint Information Architecture for Purview deployment
Disposition Limitations	Disposition has its limits! Disposition review is unsafe – learn a safe approach for effective disposition review.
Retention Labels	Retention labels can both help and harm your compliance. Learn how to avoid the dangers, and how to avoid the dreaded "competing retention rules".
Purview Policies	Purview has two very different meanings of "Policy". By understanding the differences, you'll know which type to use and when
The M365 Substrate	Yes – you really do need to understand the M365 substrate. Compliance is impossible without it. Learn to find it, how it works, how you need to use it, and the notorious "refinable string" limitation.

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	M365 RM1U
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

Microsoft 365™ Recordkeeping for IT People	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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www.rimtechconsulting.com

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