RIMtech Educational Seminar
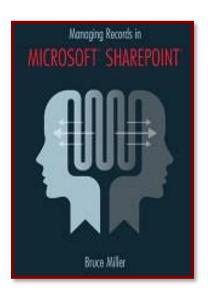## Irvine CA July 17 – 18 2017

Managing Electronic Records with Microsoft SharePoint®
Instruction by Bruce Miller IGP, MBA

Designed for IT and RIM Professionals, this two-day seminar is an intense, "how-to" workshop-oriented treatment of **E**lectronic **D**ocument & **R**ecords **M**anagement **S**ystem (EDRMS) project implementation for Microsoft SharePoint. IT attendees will learn the essential recordkeeping science they'll need to understand, and how to achieve successful SharePoint adoption. 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. Participants will apply this knowledge to real-world records-compliant solutions for SharePoint. Grounded in solid recordkeeping principles and practical SharePoint know-how, course material includes state of the art third-party recordkeeping add-in technology. This seminar is designed and delivered by **Bruce Miller**, best-selling author and leading expert in electronic recordkeeping, and author of "*Managing Records in SharePoint*". This workshop is highly interactive. Work in teams with fellow participants to tackle real-life project challenges and clear project-threatening roadblocks. In simulated hands-on software exercises, you'll apply your new knowledge and insight to make critical project decisions and apply the technology to deliver measurable results. In team exercises 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.

Objectives

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

- Understand the capabilities and limitations of SharePoint's native recordkeeping capabilities
- Clearly define recordkeeping requirements for SharePoint
- Understand how to achieve end user adoption of SharePoint
- Achieve full recordkeeping automation with Rules-Based Recordkeeping
- Learn to leverage third-party recordkeeping add-in software to achieve SharePoint recordkeeping
- Configure SharePoint with appropriate metadata, libraries and folders, content types, and storage locations
- Develop a detailed project plan with resources and budget
- 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
- Adapt your retention schedule for EDRMS utilization

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.

IGP Credits
Completion of this course provides **18** hours of IGP Recertification credits (12 General, 6 IT hours)

CRM Certification Maintenance Points
Following completion, CRM holders are eligible for 14 maintenance points**.**

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 & informative seminars I can remember attending. I got a lot of great takeaways & can enthusiastically tell my employer that this was a productive use of my time & 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!

IGP INFORMATION GOVERNANCE PROFESSIONAL

ICRM Institute *for* Certified Records Managers

Seminar Leader

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. He is currently authoring a book "*The Science of Electronic Recordkeeping*" and another entitled "*EDRMS Implementation*", scheduled for publication in 2017. 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, and a Masters in Business Administration from Queen's University, and is a certified Information Governance Professional.

Workshop Syllabus

Topic	Description
The Science of Electronic Recordkeeping	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.
Key EDRMS Performance Metrics	Learn how to measure and analyze the core RIM and SharePoint performance metrics common to all EDRMS projects.
SharePoint's Native recordkeeping capabilities	Understand SharePoint's native recordkeeping capabilities and limitations, what to use and what to avoid, and the relationship between RM add-in software and native SharePoint capabilities.
Essential SharePoint Concepts	What all stakeholders need to understand about SharePoint to make key decisions and deploy a successful solution
Strategic Implementation Decisions	Make the 20+ strategic, critical decisions every EDRMS project will demand.
RM Add-ins	Learn the architecture and deployment models of the (4) popular RM add-ins for SharePoint. Review the top-10 comparative features of each, select the optimal add-in for your project.
The RIM Role	Understand what it takes to define, develop, and implement an EDRMS project using SharePoint, and how to keep the project healthy over its lifetime.
The IT Role	Understand how to configure SharePoint for recordkeeping compliance, manage email, preserve KPI minimums, and leverage third-party add-in software technology.
RIM Foundation	Learn how to prepare the RIM foundation, including the retention schedule and physical records, for EDRMS deployment.
Rules-Based Recordkeeping	How to automate end-user RIM processes including declaration and classification such that end user RIM participation can be virtually eliminated. Create rules in workshop exercises.
SharePoint Configuration	Learn and practice a method for defining and deploying document metadata, content types, libraries and folders in support of record compliance.
Project Resources	Learn how to accurately estimate the types and quantities of human and financial resources required for successful project implementation.

Registration Form (1 form per registrant)   Form # SP2US

Mr./Ms./Mrs.	Name		Title
Organization		Department	
Address			
City		Prov.	Postal Code
Telephone		Ext.	Country
Email Address:			

Payment Method

Please Bill Credit Card	❑ Visa	❑ Mastercard	❑ American Express
Name on Card			
Card Number			Exp. Date ____/20____
Signature			

❑ Cheque, Payable to **RIMtech Inc.**   ❑ Invoice, P.O. # (Attach P.O.)

Registration Fees

Registration Type	Advance (30+ days prior)	Regular (within 30 days of start)
Standard	$800	$1,000
ARMA/AIIM member	$700	$800
Group, 4+ call Brandi Van Haren (613) 355-4996		
HST (if applicable)		
TOTAL		

Five Ways to Register & Pay

1. Online	Go to the details page of the desired seminar. 1. Complete the Registration form. 2. Click on the appropriate Paypal button to pay via credit card.
2. Telephone	Call Brandi Van Haren at (613) 355-4996 and we can take credit card details over the phone.
3. Email	Complete this form and scan it to PDF, then email it to us at brandi@rimtechconsulting.com.
4. Cheque	Complete this form and enclose a cheque. Mail to RIMtech Inc., 50 Argue Drive, Ottawa, On Canada K2E 6S1
5. Purchase Order	Complete this form, include Purchase Order, scan to PDF, then email to us at brandi@rimtechconsulting.com, or mail to RIMtech Inc., 50 Argue Drive, Ottawa, On Canada K2E 6S1

Terms and Conditions

1. **Materials.** Participants will receive a comprehensive set of program materials in electronic form, and an official completion certificate, following course completion.
2. **Conditions.** The registration fee covers attendance for one person, course materials, lunch on both days, morning coffee on both days and refreshments during all breaks.
3. **Absence**. If you have paid but are unable to attend, program materials will be shipped to you on request only.
4. **Payment**. Payment or a firm purchase order must be received by the program date.
5. **Groups**. Groups of 4 or more from the same organization receive a discounted registration fee. Contact us or call (613) 355-4996.
6. **Substitute**. Please notify us at brandi@rimtechconsulting.com at least 48 hours in advance if you are sending a substitute participant.
7. **Participant Cancellation**. To cancel, you must notify us 10 days prior to the program date. A credit voucher will be issued for the full amount of the program, redeemable for 1 year against any other seminar of equal or lesser cost. If you prefer, you may request a full refund less 20% administrative charge.
8. **No-Show**. If you fail to attend without cancelling in advance, registrants will not be eligible for a refund.
9. **Event Cancellation**. RIMtech reserves the right to cancel any seminar it deems necessary and will, in such an event, refund the full registration fee. RIMtech will make every effort to immediately notify registrants of a cancellation. RIMtech will not be held responsible for any airfare, hotel, or other costs incurred by registrants.
10. **Liability**. RIMtech assumes no liability for changes in seminar dates, content, speakers, or venue.
11. **Currency.** All fees are in US dollars.
12. **ARMA/AIIM.** You qualify for this rate only if you are a member in good standing of ARMA or AIIM as of the date of registration.