## SharePoint® EDRMS - Basic

Instruction by Bruce Miller IGP, MBA

Duration
8 hours (1 day)

SP EDRMS 1U

RIMtech Private Online Courses are delivered on-demand to a single organization, with up to 10 participating employees. Content is focused/tailored to your organization, and your particular requirements/interests.

Designed for IT and RIM Professionals, this course is a "how-to" 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. You'll 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 course is designed and delivered by **Bruce Miller**, author, independent consultant, and leading expert in electronic recordkeeping, and author of "*Managing Records in SharePoint*". This course is interactive. 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. You'll learn to avoid common implementation mistakes and overcome barriers to user adoption.
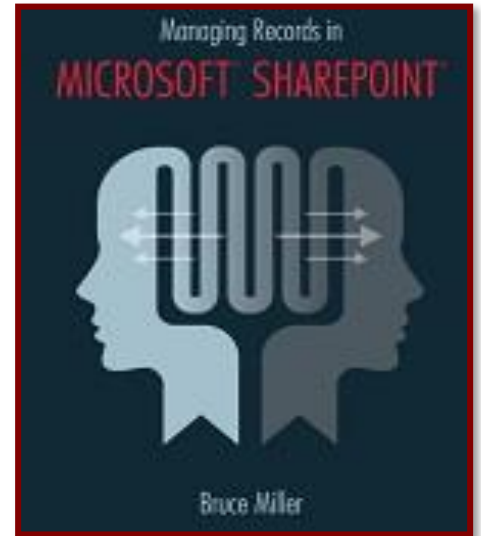
Learning Objectives

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
- 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

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	14 (ARMAIGP2020_00068)	CRM	7 (2020120926809)

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
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 strategic, critical decisions every EDRMS project will demand.
RM Add-ins	Learn the architecture and deployment models of the 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.
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.

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 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® EDRMS - 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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