

4-Day ERM Master Class

- Learn global best practices to plan, design and implement Electronic Record Management

Introduction

The Electronic Records Management (ERM) Certificate Program is designed from global best practices among our 60,000 members. It explores records management in relation to the business needs of all types of organizations both in the public and private sector, embracing all records but with a particular emphasis on electronic records.

AIIM represents the Information Management community as the global association for both users and suppliers of Enterprise Content Management solutions – the strategies, services and technologies which enable organizations to capture, manage, store, preserve and deliver information to support business processes. We have existed for more than 60 years, and we are a not-for-profit organization.

Course Development

The course objectives and content is defined and reviewed by AIIM Education Advisory Groups in the US and Europe, representing AIIM's more than 60,000 members. These Education Advisory Groups have the following members:

@doc	Kent State University
Adobe	Marion County Health Dept
Booz Allen Hamilton	NHS National Services Scotland
Canon	OpenText
CreditSuisseFirstBoston	Ovum
Docubase	Ricoh
Doculabs	SAP
EMC Documentum	Stellent
FBI	The Cabinet Office of UK
FileNet	The National Archives of UK
Gartner	TIAA-CREF
Gimmel Group	Tower Software
GlaxoSmithKline	US District Courts
Hummingbird	PwC
Hyland Software	Xerox Global Services
JPMorgan Chase	

The course materials were produced by Cornwell Management Consultants and The Oxford Group based on requirements and best practices defined by the above companies.

Course Description

The ERM Master Training Class provides you with a good coverage of ERM with the main elements from AIIM's ERM Strategic, Practitioner and Specialist training programs in addition to case study exercises. This 4 day training program covers why, what and how to implement ERM.

- The **ERM Strategic** component provides you with the knowledge to get ownership and support by senior executives and users
- The **ERM Concepts** component covers the lifecycle of records and related concepts such as Classification Schemes, Metadata, Security, Retention and Disposal.



- The **ERM Process** component covers the implementation and related processes such as Information Survey, Business Requirements, Business Case, and Roll Out.
- The **ERM Case** component allows to you discuss, share and learn global best practices for ERM.

Course Objectives:

Strategic Component: (Why ERM?)

- *Understand ERM business drivers*
- *Be able to do a “wake up call” about the need for best practice ERM*
- *Make explicit link between ERM and current situation*
- *Demonstrate how ERM affects each user*
- *Understand the concepts of ERM and show how it supports information challenges*
- *Identify necessary resources and responsibilities for implementing ERM*
- *Explore the implications of a strategic ERM decision*
- *Gain commitment for change*

Concepts Component: (What is ERM?)

- *Understand Records Management terminology*
- *Understand the lifecycle of records with focus on electronic records*
- *Consider the sources of records and appropriate capture mechanisms*
- *Explain the concepts of classification and different approaches depending on local business needs*
- *Review current metadata standards and guidelines*
- *Understand search and retrieval*
- *Explore different levels of access control and permissions*
- *Determine retention or disposal*
- *Review digital preservation techniques*
- *Determine migration*
- *Agree upon ERM administration and audit*
- *Identify necessary Legislation, Standards and Regulation*
- *Understand discovery, disclosure and related issues*

Process Component: (How to implement ERM?)

- *Manage an ERM program consisting of several coordinated projects*
- *Identify the new roles, responsibilities and organizational structure to provide governance and management of an ERM facility*
- *Understand “Concept of Operations” as a shared vision of an ERM future*
- *Develop an Information Survey – what information do we have?*
- *Develop a Business Case for ERM*
- *Identify the business requirements of the ERM system*
- *Develop and implement a Business Classification Scheme*
- *Explain the details of user groups and users*
- *Understand the impact of implementing ERM on the organization’s IT infrastructure*
- *Understand Pilot Implementation / Model Office*
- *Define and explain the roll-out stage of ERM projects*



- *Recognize steps involved with sustaining ERM after implementation and realizing the benefits*

Case Component:

- *Allows the delegates to get some practical experience using their new knowledge*

Course Designation

You will be awarded the AIIM ERM Master (ERM^M) designation after passing the online exam and case study exercise. This is a new AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM ERM Master. You can use the associated logo and title on your business card, email signature, web page, etc. The exam and case study exercise are available via the Internet and you must pass these within 3 months of attending the training course.

Benefits of becoming ERM Master (ERM^M):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for planning and implementing ERM
- Discover real world solutions and best practices for challenges you face
- Learn from experts in the field who are able to answer your questions, available to address your comments, and willing to accept your feedback

Who should attend AIIM's ERM Master Class?

The ERM Master Class provides a detailed coverage of records management in the electronic environment for people working in both in the public and private sector. Through attendance in this program, delegates will be able to consolidate their current position and standing, as well as prepare for future career development in a more senior role in the management and development of an organization's records and information management strategy.

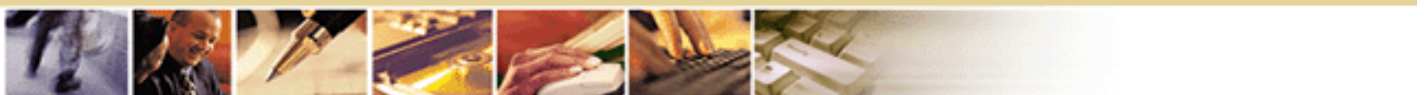
The ERM Master Class is designed for Business Managers, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers and Information Managers, as well as for solution providers, sales consultants, project managers, and technical staff.

Audiences

- Regulatory (audit, CPA, financial, governmental)
- IT Management
- Technical staff
- Record Management personnel
- Business Unit (line staff & management)
- Implementation team-IT and business
- Suppliers/Solution Providers/Vendors
- Executives
- Change agents
- Users

How will I learn at AIIM's ERM Master Class?

Our courses follow the Oxford Learning Model with engaging, impactful and live workshops with participative and challenging exercises. The elements of this methodology are:



- **3 Domains:** development should engage participants at three levels – emotionally (feeling – the heart); logically (thinking – the head) and practically (doing – the hand)
- **Transferability:** delegates should always be able to see how the skills that they are developing can be used back at their workplace
- **Memory:** the design of the event and the activities within it should be memorable
- **Measures:** participants (and their organizations) should be able to measure the impact of the intervention
- **5 Senses:** the activities within a development program should appeal to all 5 senses wherever possible, to stimulate a range of different responses
- **Reflective Dialogue:** activities are not effective unless there is a period of reflection built into a program, so that participants can reflect on their actions and plan how they would do things in future
- **Transparency:** we encourage an environment of openness, trust and transparency – no tricks, no ‘reporting back’ unless agreed.

Course Material

You will receive an ERM Workbook and access to supporting ERM online courses and exam.

- The **ERM Strategic** component will be accompanied by a short reference handout on key standards and guidance documents relevant to ERM from North America, Europe and Australasia. Each such document will be briefly described, together with its status and (where relevant) its relationship to other documents. If possible, the relationships will be shown graphically.
- The **ERM Concepts** component will be accompanied by a short reference handout which will include an annotated entity-relationship model and abbreviated glossary. It will also include a list of useful references (such as URLs for software certification scheme websites).
- The **ERM Process** component will be accompanied by a handout identifying potentially useful external resources. Each module will have a separate handout.
- The **ERM Case** component provides you with a series of case study exercises that gives participants a feel for what is involved, the information that needs to be gathered and processed, the outcomes expected and the amount of effort likely to be involved in a real world situation.

Course Agenda

Day 1, Strategic

- Introduction
- Business drivers for ERM
- ERM Terminology
- Best practice ERM
- Analyzing current situation
- Demonstrate new solutions
- Explore the implications of ERM
- What’s involved?
- Who’s responsible?
- Next steps

Day 2, Concepts

- ERM Information Lifecycle



- Creating records
- Metadata
- Classification Schemes
- Storing records
- Search engines
- Access control and permission
- Delivery of records to users
- Legal Holds
- Digital preservation
- Disposition schedules
- Disposal
- Transfer
- Migration
- Administration
- Software Certification: its value and limitations
- Legislation, Standards and Regulations
- Next step

Day 3, Process

- ERM Project & Program Management
- Information Governance
- Concept of Operations
- Information Survey
- Business Case
- Business Requirements
- Business Classification Schemes
- Details of user groups & users
- IT Infrastructure details
- Pilot or Model Office
- Roll-out
- After Implementation

Day 4, Case

- Introduction of Case Studies
- Group 1 – Strategy
- Group 2 – Concepts
- Group 3 – Process
- Develop possible solutions
- Presentations by Groups
- Evaluation & Discussions
- Post-Workshop Case Study

Summary

Training:

- ERM Master Class, 5-days, 9:00 AM – 5:00 PM with a maximum of 15 attendees



- Includes access to 29 supporting web modules (each approx 1 hour)
- Includes a case study exercise that must be answered within 3 months
- Includes 3 opportunities to take and pass the AIIM ERM Master web exam
- Includes English language delivery and all training materials

