

## 2 day ECM Practitioner Training Class Outline

*Learn strategies, tools and technologies to capture, store, manage, preserve and deliver content*

### Introduction

The AIIM Enterprise Content Management (ECM) Certificate Program is designed from global best practices among our 65,000 associate and professional members. The training program covers the strategies, tools and technologies to capture, store, manage, preserve and deliver information in support of business processes. It provides you with a framework which enables the management of information assets across an organization, and it ties in relevant components and technologies. This could be Imaging, Electronic Document Management, Electronic Records Management, Workflow, Web Content Management, Document Centric Collaboration, or Enterprise Search technologies.

AIIM is an industry association that provides education, research, and best practices to help organizations find, control, and optimize their information. For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire Enterprise Content Management industry - including users, suppliers, and the channel - acts as the industry's intermediary

### Newly Revised and Updated

AIIM has just revised and updated the ECM Certificate Program based on changes in the industry with new content types, solutions, and best practices, but also incorporated comments made by the thousands of students that have taken the courses, online or in our classrooms. Students who have previously completed the ECM program should consider taking this newer version to enhance their skills and strengthen their learning from the previous course. In addition to updating their certificates and designations, attending the revised Practitioner program will bring benefit from the expanded focus on available solutions (e.g. SharePoint 2007); new content types (e.g. wikis and blogs); taxonomies and folksonomies; new preferred approaches (platforms/solutions); and new best practices and standards (e.g. PDF/A and MoREQ2).

### 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 65,000 associate and professional members. These Education Advisory Groups have the following members:

Accenture	Gambro
Albistur Consulting	Gartner
Barclays Capital	Gimmel Group
Bill and Vieve Gore School of Business, Westminster College	GlaxoSmithKline
BP	Harris Corporation
CCRM Associates	Hartman Communicatie
Chevron Phillips Chemical Company	Health First
CIA	Hewlett-Packard
Crown Partners	Hyland Software
Doculabs	IBM
Fujitsu	Inforesight Limited
	JPMorgan Chase



Kodak  
Marion County Health Dept.  
Objective Corporation  
Oracle  
Ordina  
Ricoh  
Royal Mail Group  
Shell

SpringCM  
Sunoco  
The National Archives of United Kingdom  
The South Financial Group  
US Courts  
US Department of Treasury  
ZyLAB

The course materials were developed in partnership with Information Architected Inc based on requirements and best practices defined by the above companies.

### Course Description

The ECM Practitioner Training Class provides you with a good understanding of strategies, methods and tools for managing content. This includes technologies and global best practices for information architecture, scanning/imaging, metadata, taxonomies, content security, process management and automation, findability, delivery, and presentation.

### Course Objectives:

Practitioner Component: (What is ECM?)

- Business benefits of ECM
- ECM technologies such as document management, imaging, records management, workflow, web content management and collaboration
- Preferred approaches, platforms vs solutions, enterprise vs departmental
- Information architecture, interoperability, and integration
- Sources of information and appropriate capture and migration mechanisms
- Metadata and indexing
- Types of taxonomies and their value
- Ontologies and folksonomies
- Different levels of access control and security
- Process improvements and automation
- Search and retrieval technologies
- Different ways of delivering information and content to employees, partners and customers
- Existing and emerging trends such as Web 2.0, SaaS, and Open Source.

### Course Designation

You will be awarded the AIIM ECM Practitioner (ECM<sup>P</sup>) designation after passing the online exam. This is an AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM ECM Practitioner. You can use the associated logo and title on your business card, email signature, web page, etc. The exam is available via the internet – you have 6 months to pass the test after attending the training course. The designation is valid for 5 years.

Benefits of becoming an AIIM ECM Practitioner (ECM<sup>P</sup>):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills



- Learn global best practices for planning ECM
- Discover real world solutions and best practices for challenges you face
- Learn from experts in the field who are able to answer your questions, address your comments, and are willing to accept your feedback.

### **Who should attend AIIM's ECM Practitioner Class?**

The ECM Practitioner Class provides a detailed coverage of Enterprise Content Management for people working in both the public and private sector. Through attendance in this program, students 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 information management strategy.

The ECM Practitioner Class is designed for Business Managers, IT Managers, Compliance Officers, Risk Managers, Records Management Professionals, as well as for solution integrators and providers, sales consultants, project managers, and technical staff.

### **How will I learn at AIIM's ECM Practitioner Class?**

The courses follow a proven 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:** students 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

### **Course Material**

You will receive an ECM Workbook and access to supporting ECM online courses and exam. This is also accompanied by course notes, reference handouts, and an abbreviated glossary.

### **Course Agenda**

#### Day 1, Practitioner

- Introduction to ECM
- Technologies and Functionality
- Information Architecture
- Capture
- Metadata
- Taxonomy
- Exercise : Creating a Taxonomy

#### Day 2, Practitioner



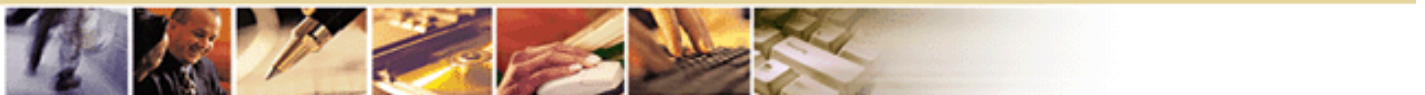
- Security and Control
- Process and Automation
- Findability
- Delivery and Presentation
- Trends and Directions
- Exercise: Redefining ECM
- Next Steps

Please note that this AIIM ECM Certificate Program is designed to give all participants an appreciation of global best practices of ECM. You should not expect to gain in-depth expertise in all aspect of ECM from this Program. If you need in-depth expertise you should refer to specialist courses, references or expert assistance.

### **Feedback**

Below is feedback from previous and existing course attendees;

- “AIIM’s training programs are essential to anyone in Information Management. Without up to date training, systems and programs are set up -- but may be at risk, in the long run, if developed by the under trained. The Information Management Industry as a whole is developing at the speed of light, so even someone like myself (a 23 year veteran) needs to refresh their training and stay on top of technology and advancement in trends to understand how to apply it. AIIM’s training programs provide this education.” TK Train, CRM, ECMp, MBA, Document Control Manager, Gambro
- “Enterprise records management or content management projects are comprised of cross functional teams with various backgrounds and specialties. It is important to the success of such projects that interdisciplinary teams develop a common lexicon and understanding of key concepts as fast as possible to enable collaboration. AIIMs educational curricula serve this need quickly and excellently”, Jayne Bellyk, RIM Program Manager, Chevron Phillips Chemical Company LP
- “Kodak clearly understands the value of the AIIM ECM courses. Our sales team uses this knowledge often as we support our document imaging resellers in their sales processes.” Todd LeVeque ECMp CDIA+, Director - US Channel Sales, Document Imaging - Graphic Communications Group, Eastman Kodak Company
- "The AIIM ECM training course provides an extremely comprehensive platform related to the enterprise content management industry and the technologies that support and drive it. The materials are thorough, up-to-date and well presented. I would recommend the course to both vendors and customers of ECM solutions." John Opdycke, Vice President of Marketing, Hyland Software



- "Fujitsu chose the AIIM ECM Certificate Training Program to empower our partners with the tools and strategies to help companies world-wide achieve successful ECM implementations."  
Pamela Doyle, Director, Fujitsu Imaging Products Group

Go to [www.aiim.org/training](http://www.aiim.org/training) to learn of public courses being held in your area and their dates, and please contact [training@aiim.org](mailto:training@aiim.org) if you have any questions.

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