

## 4 day ERM Master Training Class Outline

*- 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 65,000 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.

### Newly Revised and Updated

AIIM has revised and updated the course material for its ERM Practitioner and Specialist (and combined, its Master) courses. The original content was developed in 2006 and there have been substantial changes in the methods, standards and technologies for addressing electronic records management (ERM) since that time. AIIM has also taken the comments made by its thousands of students who have taken the courses, online and in our classrooms, and have consolidated and improved the course curriculum.

Students, who have completed the ERM program previously, should consider taking this newer version to enhance their skills and strengthen what they learned in the prior course. In addition to updating their certificates and designations, attending the revised program will bring benefit from the expanded focus on new content types (wikis, blogs, etc.), tighter focus on email (capture and retention), changes in the vendor landscape, new best practices and standards, and implementing ERM based on the ISO/TR 15489-2.

### 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 members. These Education Advisory Groups have the following members:

@doc	Gambro
Accenture	Gartner
Albistur Consulting	Gimmel Group
Barclays Capital	GlaxoSmithKline
Bill and Vieve Gore School of Business, Westminster College	Harris Corporation
BP	Hartman Communicatie
CCRM Associates	Health First
Chevron Phillips Chemical Company	Hewlett-Packard
CIA	Hyland Software
Crown Partners	IBM
Doculabs	Inforesight Limited
Fujitsu	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 Access Sciences Corporation 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 Practitioner** component covers the lifecycle of records and related concepts such as Classification Schemes, Metadata, Security, Retention and Disposal.
- The **ERM Specialist** component covers the implementation and related processes such as global best practices for ERM implementation and related processes such as Business and Systems analysis, Developing a Business Case, Business and System Requirements, Project Management, and Roll out.
- The **ERM Case** component allows you to discuss, share and learn global best practices for ERM.

### Course Objectives:

Strategy Component: (Why ERM?)

- *Understand what electronic records management is*
- *Learn electronic records management principles*
- *Appreciate the importance of records*
- *Understand ERM business drivers*
- *Identify necessary roles and responsibilities for successful ERM*
- *Understand information governance*
- *Learn what activities and functionality are required for ERM*
- *Understand the concepts of ERM and show how it supports information challenges*
- *Learn how to implement an ERM environment (policies, processes and people)*
- *Understand how to implement an ERM solution*
- *Gain commitment for change*

Practitioner Component: (What is ERM?)

- *Understand records management terminology and principles*
- *Understand the lifecycle of records, with focus on electronic records*
- *Consider the sources of records and appropriate capture mechanisms*
- *Learn about current metadata standards, guidelines and practices*



- *Understand the concepts of classification and different approaches depending on local business needs*
- *Understand search, retrieval and presentation*
- *Explore different levels of access control and permissions*
- *Determine retention and disposition*
- *Learn about records management technologies*
- *Understand the need for ERM governance, staff and audits*
- *Learn about electronic records storage*
- *Understand digital preservation techniques*

#### Specialist Component: (How to implement ERM?)

- *Identify the stakeholders of an ERM program*
- *How to carryout business and technology assessments*
- *Develop a Business Case for ERM*
- *Planning the implementation of ERM according to ISO15489-2*
- *Identify the business and system requirements of the ERM system*
- *Understand information governance*
- *Identify records management policies and procedures*
- *Learn how to design records management processes*
- *Learn how to design records technology solutions*
- *Understand model offices and pilot implementation*
- *Define and explain the project work products for ERM implementation*
- *Understand what is meant by benefits realization*
- *Learn about discovery and disclosure activities*
- *Learn how to address trans-jurisdictional records management issues*
- *Understand records management issues with email, mobile communication devices and E2.0 technologies*

#### Case Study Component:

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

#### Course Designation

You will be awarded the AIIM ERM Master (Erm<sup>M</sup>) designation after passing the online exam and case study exercise. This is an 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 – you have 6 months to pass the test, and 3 months to submit your case study, after attending the training course. The designation is valid for 5 years.

#### Benefits of becoming ERM Master (Erm<sup>M</sup>):

- 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, address your comments, and are 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, 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 records and information management strategy.

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

### How will I learn at AIIM's ERM Master 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 ERM Workbook and access to supporting ERM online courses and exam.

- The **ERM Strategy** 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 Practitioner** component will be accompanied by the course notes, reference handouts which will support the course material and an abbreviated glossary. It will also include a list of useful references (such as URLs for software certification scheme websites).
- The **ERM Specialist** component will be accompanied by the course notes and handouts supporting the course material, including useful external resources.
- 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, Strategy and Practitioner

- Introduction to ERM



- Business drivers for ERM
- Roles and responsibilities
- ERM in practice
- Implementing ERM
- ERM concepts and principles
- Creating and capturing records
- Metadata development and use
- Introduction to classification
- Classification schemes, file plans and retention schedules

## Day 2, Practitioner

- Search engines
- Delivery of records to users
- Access control and permissions
- Retention and disposition schedules
- Transfer and Disposal
- Records management technologies
- Electronic records migration
- Program and systems administration
- Storing records
- Digital preservation

## Day 3, Specialist and Case

- Preliminary Investigation
- Business Analysis
- Business Case
- Group Exercise 1 – Strategy
- Business and System Requirements
- Information Governance
- Designing the Records System
- Group Exercise 2 – Practitioner

## Day 4, Specialist and Case

- Implementation
- Post-Implementation
- Discovery and Disclosure
- Enterprise Electronic Records Management
- Emerging Issues in Electronic Records Management
- Group Exercise 3 – Specialist
- Next Steps

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



You can go to <http://www.aiim.org/Training> for course details and please contact [training@aiim.org](mailto:training@aiim.org) if you have any questions.

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