

## 2 day ERM Practitioner Training Class outline

*- Learn ERM concepts for managing electronic records through their lifecycle*

### 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, whether in the public or private sector, embracing all records, but with a particular emphasis on electronic records.

AIIM is an 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 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 and new best practices and standards (MoReq2).

### Course Development

The course objectives and content are defined and reviewed by AIIM Education Advisory Groups in North America and Europe, representing AIIM's more than 65,000 members. These Education Advisory Groups have the following members:

@doc	Fujitsu
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
	Infosight 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 Access Sciences Corporation based on requirements and best practices defined by the above companies.

### **Course Description**

The ERM Practitioner Training Course covers the lifecycle of records and related concepts such as Classification Schemes, Metadata, Security, Retention, Preservation and Disposal. You will receive an ERM Workbook and access to supporting ERM online modules and exam. This 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).

### **Course Objectives:**

Concepts 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*

### **Course Designation**

You will be awarded the AIIM ERM Practitioner (erm<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 ERM 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 and you must pass it within 6 months of attending the training course. The designation is valid for 5 years.

### **Who should attend AIIM's ERM Practitioner training course?**

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



## Audiences

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

## How will I learn at AIIM's ERM Practitioner training course?

The course follows 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 course 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 the future

## Course Agenda

### Day 1, Concepts (1)

- Introduction to ERM
- Key ERM terminology
- Business drivers for 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, Concepts (2)

- 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
- Next step

Please note that the AIIM ERM Practitioner 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 specialised courses, references or expert assistance.

### Summary

#### Training:

- ERM Practitioner Class, 2-days, 9:00 AM – 5:00 PM with a maximum of 15 attendees
- Includes access to supporting online modules
- Includes 3 opportunities to take and pass the AIIM ERM Practitioner online exam
- Includes English language delivery and all training materials

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

Contact [askjekkeland@aiim.org](mailto:askjekkeland@aiim.org) if you are interested in becoming an AIIM Training Partner. You can then sell and deliver AIIM Training Programs leading to AIIM designations.

An online version of this training class is available via [www.aiim.org/training](http://www.aiim.org/training).

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