

Online ERM Practitioner Training Courses

- 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 Courses cover the lifecycle of records and related concepts such as Classification Schemes, Metadata, Security, Retention, Preservation and Disposal. You will get access to ERM online courses and exam. This will be accompanied with linked references that include supplemental material, reference links and an 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^P) 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 taking the course modules. 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

Course Agenda

Module 1 – Introduction to ERM

- Introduction to ERM
 - Including business drivers
- Terminology
 - Using ISO 15489, DoD 5015.2 and MoReq2
- Key ERM concepts
 - Including when is information a record
- Records management principles
 - Records lifecycle

Module 2 – Creating and capturing records

- Types of records
- Determining what to capture
 - Purpose, process and sources of electronic records
- Approaches to capture
 - Including manual, automated and bulk import
- Capturing and managing physical records
 - Scanning
 - Challenges in managing physical records

Module 3 – Metadata

- Metadata concepts and standards
 - Using ISO 23081
 - Types of records-related metadata
- Metadata sources
 - Users
 - Computer application/system generated
- Applying metadata to records
 - Manual
 - Automated
 - Inheritance
- Automated metadata collection



Module 4 – Introduction to classification

- Introduction to classification
 - Why classification matters
 - Benefits
- Classification concepts
 - Purpose of classification scheme
 - Purpose of a file plan
 - Purpose of a records retention schedule
- Classification approaches
 - Deployment
- Classification categories
 - Autocategorisation
 - Organizational taxonomy

Module 5 – Developing classification tools

- The records inventory
 - Value
 - Objectives
- Developing a classification scheme
 - Guidelines
 - Characteristics
 - 8 Step approach
- Developing a file plan
 - Characteristics
 - How to develop
- Developing a retention schedule
 - How to develop

Module 6 – Classifying records

- How to classify records
 - Manual
 - Challenges
- Autocategorisation
 - Approaches
 - Issues
- Tagging and folksonomies
 - Recommendations and best practices

Module 7 – Search, retrieval and presentation

- Search and retrieval concepts
 - Introduction
 - Different search approaches
- Presentation and rendition
 - Record viewers
- Annotation and redaction
 - What are these
 - Concerns

Module 8 – Controls and security

- Governance and instruments
 - What are these



- Security and access controls
 - Characteristics of authoritative records
 - Objects of user access rights
- Audit Trails
 - Importance of audit trails
 - Considerations
- Encryption and digital rights management (DRM)
 - Encryption issues
 - Impact of DRM on ERM
 - DRM issues

Module 9 – Retention and disposition

- Retention and disposition
 - Retention questions
 - Key factors
 - Applying retention periods
- Exporting and transferring records
 - When and how
- Destruction of records
 - Destroying physical records
 - Destroying electronic records
- Post-disposition considerations
 - Destruction documentation and stubs

Module 10 – Records management technologies

- Managing records without and ERMS
 - Share drive issues
 - Local file storage issues
- Technology options
 - Impact of ERM on IT infrastructure
 - Records management applications
 - Enterprise content management (ECM) systems
 - Electronic records management (ERM) systems
 - Basic content services
 - Compliance solutions
 - Point solutions
- Implementation models
 - Application server model
 - Appliance model
 - Hosted solution
 - Client/Plug-in
- Software certifications
 - Why important
 - How to use

Module 11 – Electronic records storage

- Storage concepts
 - Storage, backup and archives
- Storage technologies
 - Magnetic disk storage
 - Optical storage
 - Solid-state storage



- Enterprise storage
- Selecting the appropriate storage technology
 - Regulatory considerations
 - Vendor considerations

Module 12 - Digital preservation

- Introduction to preservation
 - Physical preservation principles
 - Electronic preservation principles
- Risk factors and issues
 - Time
 - Access Frequency
 - Complexity
 - Volume
- Approaches to preservation
 - Technology preservation
 - Emulation
 - Migration
 - Analogue preservation
- The migration plan
 - 4 Step approach

Students have unlimited access to the online courses and handouts for 6 months. Students will have one small exam, with 15 questions, at the end of each module. You need 70% correct answers to pass the exam – you have 3 attempts to pass the online exam that is found on the website with the modules. With the passing of all of the exams, you will receive the designation. The designation is valid for 5 years. The designation is valid for 5 years.

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:

- 12 ERM Practitioner Course Modules, to be taken at your convenience over a 6 month period.
- Includes 3 opportunities to take and pass the AIIM ERM Practitioner module online exams
- Includes English language delivery and all training materials

Go to www.aiim.org/training to find this online course or, perhaps, classroom public courses being held in your area and their dates. Contact training@aiim.org if you have any questions.

Contact 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.

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