

Online ERM Specialist Training Courses

- Learn how to implement ERM programs and projects

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, new best practices and standards (MoReq2) and our ERM implementation segment based on the ISO/TR 15489-2:2001.

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



IBM
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 Access Sciences Corporation based on requirements and best practices defined by the above companies.

Course Description

The ERM Specialist Certificate Program covers 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. You will also gain knowledge on advanced topics including Enterprise ERM and Emerging Issues. 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).

We recommend that all course attendees have a good understanding of ERM concepts such as Classification Schemes, Metadata, Security, Retention, Preservation and Disposal before attending the ERM Specialist training program, or that they first take the AIIM ERM Practitioner training program.

Course objectives

- *Manage an ERM program consisting of several coordinated projects*
- *Identify the stakeholders of an ERM program*
- *How to carryout business and technology assessments*
- *Develop a Business Case for ERM*
- *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*

Course Designation

You will be awarded the AIIM ERM Specialist (erm^S) 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 Specialist. 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 training modules. The designation is valid for 5 years.

Who should attend AIIM's ERM Specialist Class?

The ERM Specialist Class is designed for Business Managers, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers, etc, 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 Process Management staff
- Executives
- Business Unit (line staff & management)
- Compliance Officers and staff
- Implementation team - IT and business
- Suppliers/Solution Providers/Vendors
- Change agents

Course Agenda

Module 1 – Preliminary Investigation

- Introduction to ERM implementation
 - ISO 15489-2 eight step implementation methodology
 - Potential parallel projects
- Define the scope of the programme
- Key stakeholders
 - Senior management
 - Business unit managers
 - Legal, Records Management, and IT
 - End users
- The programme charter
 - Goals and scope
 - Risks, constraints and assumptions

Module 2 – Business Analysis

- The business assessment
 - Benefits
 - Process
 - Records management assessment
- The technology assessment
 - Identify gaps in records management capabilities
- The program roadmap
 - Strategy and planning



Module 3 – Business Case

- Introduction to the business case
 - Why one is needed
 - Benefits
- Elements of the business case
 - Business case framework
- Benefits of the ERM programme
 - Framework for effective benefits realization
 - Challenges
- How to develop the business case
 - Who
 - Challenges

Module 4 – Requirements

- Introduction to requirements
 - Importance
 - Types
 - Characteristics of good requirements
- Defining requirements
 - High-level process
 - How to produce
 - Techniques to use
- Requirements for an ERM system
 - System specification standards

Module 5 – Governance

- The governance framework
 - What is governance
 - Information governance framework
 - Records management policy elements
 - Records management procedures
- Roles and tools
 - Records management instruments
- Standards and audits
 - Records management standards
- The policy development framework
 - 9 step development process

Module 6 – Designing The Records System

- Process design
 - Principles
 - User involvement
 - Design work processes
- Technology design
 - Buy vs. build
 - Design tasks
- Support design
 - Users



- Systems
- Training

Module 7 – Implementation

- The model office and pilot
 - Benefits
 - Costs
- Implementation and rollout
 - ERM technology implementation
- Change management
 - Planning
 - Communications
 - Training

Module 8 – Post-Implementation

- Go-live and project closure
 - What needs doing
- Benefits realization
 - Benefits management approach
 - Factors to monitor
- Continuous improvement
 - User feedback
 - System monitoring
 - Records management maturity model

Module 9 – Discovery And Disclosure

- Discovery and disclosure
 - What and when
 - Duty to preserve
 - Costs
 - Legal holds
- Review of case law and issues
 - ERM-related case law
- Electronic discovery reference model
 - Need for information management
- The discovery plan
 - Legal holds
 - Failure to produce

Module 10 – Enterprise ERM

- ERM in the enterprise
 - User issues
 - Content mapping
- Trans-jurisdictional ERM
 - Compliance issues
 - Internationalisation issues
 - Support requirements
- ERM and enterprise IT
 - Distributed applications



- Enterprise content management systems
- Federation

Module 11 – Emerging Issues in ERM

- Email and ERM
 - Email management
 - Classification using metadata
 - Autocategorisation
- ERM and mobile devices
 - Issues with mobile devices
 - Managing mobile devices
- Records management 2.0
 - Blogs
 - Wikis
 - Social Networks
 - E2.0 tools

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.

Please note that the AIIM ERM Specialist 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:

- 11 ERM Specialist Course Modules, to be taken at your convenience over a 6 month period
- Includes 3 opportunities to take and pass the AIIM ERM Specialist 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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