

Electronic Records Management (ERM)

Electronic Records Management Master Class

Handout 1: Workshop Outline

Day 1

Time	Session	Purpose
8:30 a.m.	Introductions, Welcome, Workshop Outline and Objectives	To provide a framework for the workshop
8:45	Strategy and Introduction	To introduce ERM basics and terminology and to outline the business benefits of ERM
10:30	Break	
10:45	Create & capture records	To identify the types of records and approaches for capturing them as records
11:30	Metadata	To describe what metadata is and identify approaches for capturing metadata
12:15	Lunch	
1:15 p.m.	Introduction to classification	To describe classification concepts, schemes, and categories
2:15	Break	
2:30	Developing classification tools	To understand the steps required to conduct an inventory and develop a classification scheme
3:30	Classifying records	To identify approaches and tools for classifying messages manually and automatically
4:15	Review of Day 1 and questions	To review the materials covered in Day 1 and prepare for Day 2
4:30	End day 1	

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Day 2

Time	Session	Purpose
8:30 a.m.	Review of Day 1	To confirm understanding of the content covered on Day 1
8:45	Search, retrieval and presentation	To describe different approaches for searching and retrieving records
9:45	Controls and security	To describe access controls and tools for securing and auditing records
11:00	Break	
11:15	Retention and disposition	To describe the significance of retention and the options available for disposition
12:15	Lunch	
1:15 p.m.	RM technologies	To identify technology options for the RM system and the significance of software certifications
2:30	Break	
2:45	Electronic records storage	To identify storage options and considerations for selecting the appropriate option
3:15	Digital preservation	To identify the risk factors associated with digital preservation and the strategies for ensuring access to electronic records over time
4:15	Conclusion	To review the materials covered in Day 1 and prepare for Day 2
4:30	End day 2	

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Day 3

Time	Session	Purpose
8:30	Review of Day 2	To confirm understanding of the content covered on Day 2
8:45	Preliminary investigation	To describe how to define the scope of the ERM programme and develop the programme charter for an ERM initiative
9:45	Business analysis	To describe how to conduct a business analysis and develop the programme roadmap
10:45	Break	
11:00	Business case	To identify the various elements of a business case and describe the process for developing a business case for an ERM initiative
12:00	Lunch	
1:00 p.m.	Requirements	To identify techniques for eliciting and validating requirements and to identify requirements for an ERM system
1:45	Governance	To describe the elements of an information governance framework and a policy development framework
2:45	Break	
3:00	Case study exercise 1	To give students an opportunity to apply the concepts learned so far
3:45	Design	To describe the steps to design records-related processes and the ERM technology system
4:15	Review of Day 3 and questions	To review the materials covered in Day 3 and prepare for Day 4
4:30	End day 3	

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Day 4

Time	Session	Purpose
8:30 a.m.	Review of Day 4	To confirm understanding of the content covered on Day 3
8:45	Implementation	To describe the steps to conduct a pilot; to describe the steps required to implement the ERM programme
9:30	Post-implementation	To describe the steps required to close the project out; to identify considerations for benefits realisation and continuous improvement
10:00	Break	
10:15	Case study exercise 2	To give students an opportunity to apply the concepts learned so far
11:00	Discovery and disclosure	To describe the discovery process; to identify the steps to create a discovery plan
12:30	Lunch	
1:30 p.m.	Enterprise ERM	To identify the impact of ERM on the enterprise
2:15	Emerging issues in electronic records management	To identify considerations for managing email, mobile devices, and Web 2.0 in the context of the ERM programme
3:15	Break	
3:30	Case study exercise 3	To give students an opportunity to apply the concepts learned so far
4:15	Conclusion and workshop evaluation	To review the materials covered in Day 4 and identify next steps including the home case study and exam. To complete the workshop evaluation and close
4:30	End workshop	