

Electronic Records & Information Management

Hampton Inn & Suites Vancouver Downtown

September 28 – 29, 2009



Course Overview:

Rapid change

2009 is a time of rapid change in Information and Records Management. New technologies such as social networking and Blogs and Wikis are changing the way electronic content is created and managed and is posing new challenges for corporate records management. Organizations are realizing that no one technology or disciplines is the answer and are developing integrated information and records management strategies. New approaches to electronic preservation and new services are beginning to offer new options for information lifecycle management including electronic archiving and shared electronic records management services.

Getting help

This course shows you where you can turn to for support both today and in the future. It will update you with the latest guidance on best practice for all aspects of information and records management, and the latest trends in the marketplace including new lower-cost platforms for content management and collaboration and enterprise search and new guides to specifying your requirements and meeting future challenges.

Reduced rates for early booking

Take advantage of our Early Bird booking rates. Register before August 28, 2009 and save! — see registration form for details.

Who should attend this event?

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| <ul style="list-style-type: none">● Records Managers● Information Managers● Archivists● Freedom of Information Managers● Compliance Managers● Knowledge Managers | <ul style="list-style-type: none">● Content Managers● Risk Managers● E-Records/IT/ & Computer Forensic Managers● Business Process Analysts● Privacy Officers● Chief Information Officer |
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Day One

September 28, 2009

Register Today!

Tel: (416) 238-2751 or (416) 238-4916

Fax: (416) 423-2638

Workshop A Impact of E-Discovery on Litigation

JOHANNA MUSTAPIC – CEO, Triage Data Solutions

- What is ediscovery and why they should be proactive rather than reactive when it comes to litigation preparedness?
- Roles of in-house vs. outside counsel
- What can be done with native files that will save money when it comes to litigation costs
- The Sedona principles and the BCSC Electronic Practice Direction

Impact Digital Forensics: Computer Forensics and E-Discovery

GABRIEL Y. KOJIMA – Certified Forensics Examiner and Security Specialist, TCS Forensics

- Digital forensics in the news
- Forensics and ediscovery general concepts
- Forensics: sources of evidence
- Wireless data
- Data defined
- Case study examples
- Online data sources – Internet investigations
- Forensic process defined

Workshop B Collaboration and Social Media: New Challenges for Records Management

JAMES M. BOND – Partner, Lang Michener LLP

- Understanding Web 2.0: Is it just another system for generating records?
- Apply record management principles to collaborative and social media content
- Methods for tracking and storing records generated by Web 2.0
- Familiarize yourself with business and market trends
- Dichotomy: Applying RM to collaborative and social media content – Bridge the Gap – Transparency trumps rigidity
- Become a champion for collaborative and social media information management
- Tighten corporate and RM policies by making them looser
- Share best practices

Workshop C Challenges of Transitioning to the EHR: Access, User & Information Management

JILL SCOTT – General Legal Counsel & Chief Privacy Officer, Vancouver Coastal Health Authority

This presentation will explore some of the challenges we face today of creating an access model for health records that is privacy compliant and address information needs. Transitioning to the EHR has meant greater transparency around access management and assignment of user privileges. It has also created unique challenges for records retention, archiving and disposal and the integrated management of paper and electronic health records. This presentation will explore some of the ways one health authority has approached these challenges.

Creating the Foundation to Support the Hybrid Health Record Environment

SHIRLEY LEARMONTH – Director Health Records Services, Vancouver Island Health Authority
The Vancouver Island Health Authority is currently working to transition from a paper-based health record to an electronic health record (EHR). VIHA's size and complexity as a region requires that the process towards an EHR environment incorporate a phased approach, a hybrid chart strategy, encompassing both paper and electronic documents and use of both manual and electronic processes. This presentation will speak to the various components of a hybrid chart strategy, touching on the necessity for strong strategic leadership/planning, supporting committee structures, foundational policy, necessity for standardization and process redesign, quality control and data integrity management to manage and support the hybrid state as the organization moves from a paper-based to an EHR environment.

Workshop D Role of Records Management in Litigation Preparedness

STUART RENNIE – Barrister & Solicitor, Stuart Rennie Consulting

- Assess existing records retention policies
- Create well defined records retention policies
- Litigation hold and preservation management
- Data map objectives
- Hypothetical Scenario: Putting theory into practice

Day Two

September 29, 2009

Register Today!

Tel: (416) 238-2751 or (416) 238-4916

Fax: (416) 423-2638

Making Electronic Recordkeeping Work *What Every RM and IT Professional Needs to Know*

BRUCE MILLER – President & Founder, RIMtech Inc.

Implementing electronic recordkeeping software into your organization is one of the most difficult challenges of modern recordkeeping. Many have attempted it – few have succeeded. Typical challenges and barriers to success include business culture and policies, user compliance, technology issues, and more.

Attend these workshop sessions to learn the new e-records software implementation methodology developed by Bruce Miller, the inventor of modern electronic recordkeeping technology. Based on 13 years of experience with e-records technology around the world, this methodology clearly spells out what you need to do, and how, to implement this technology successfully. Each of the 12 steps defines clear goals, specific tasks, and measurable outcomes, to deliver the confidence that your project is on track, and succeeding. Participants will learn the methodology, implement a hypothetical 10,000 user project, and review lessons learned from past real-world projects.

Workshop A Electronic Recordkeeping – The Science and Basic Principles

Learn the core principles of electronic records management software, with its unique language and concepts. Understand what recordkeeping principles change from traditional recordkeeping. Assess the market realities of current electronic recordkeeping projects. Learn a new generalized model for electronic records. Review a 12-step methodology for successful implementation.

Workshop B Implementation Methodology Part One

This session covers steps 1 – 6 of the 12-step implementation methodology. Learn how to build a strong team, and how to effect the necessary cultural change. Learn critical success measurements to assess the project's progress.

Workshop C Implementation Methodology Part Two

This session covers steps 7 – 12 of the 12-step implementation methodology. Learn how to prepare for the software, understand what you need to know about the software, and how to configure the software to your needs. Discover what it takes to manage a live project. Understand how to assess costs, resources required, and key measurements.

Workshop D Electronic Recordkeeping in Microsoft SharePoint/Office 2007

A comprehensive high-level overview to learn what you need to do, and how, to manage electronic records in SharePoint 2007. Understand SharePoint's key recordkeeping concepts such as the Records Centre, Document declaration, Auto-deletion, Content Types, Suspensions, and Records Expiration. See how to implement a retention schedule, declare documents against your file plan, manage electronic mail as records, apply legal holds/suspensions, and apply disposition to qualified records. Learn about the key features of MS Office 2007 that support recordkeeping. You'll also hear a discussion of the optional US DoD 5015.2 compliance module – what it delivers, how to tell if you need it, and the implications of compliance.

Registration Form

Please write in BLOCK LETTERS

1st Delegate

Name: _____

Position: _____

Email: _____

2nd Delegate

Name: _____

Position: _____

Email: _____

Company Details

Organization: _____

Address: _____

Province: _____ Postal Code: _____

Phone: _____ Fax: _____

Course Fees:

By August 28	After August 28 th
<input type="checkbox"/> \$995 both days	<input type="checkbox"/> \$1095 both days
<input type="checkbox"/> \$595 single day 28 th <input type="checkbox"/> - 29 th <input type="checkbox"/>	<input type="checkbox"/> \$695 single day 28 th <input type="checkbox"/> - 29 th <input type="checkbox"/>
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Team discounts:

2-5%
 3-10%
 4-15%
 5-20%
 6-25%

Your Registration Includes:

Registration fees include all course materials, continental breakfast, lunch and refreshments. Parking and accommodation are not included.

Course Schedule:



8:00am – 5:30pm on both days of the program.

Date: September 28 – 29, 2009

Venue: Hampton Inn Hotel & Suites
Vancouver, BC

Payment Method:

Credit Card:

Please Charge To My:  

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Signature: _____

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Mailing Address:

Acuity Forums
Toronto Star Building
1 Yonge Street, Suite 1801
Toronto, Ontario M5E 1W7

Cancellation Policy:

Substitutions may be made at any time. If you are unable to attend, please make cancellations in writing and fax to (416) 423-2638, by September 11, 2009. A credit voucher will be issued to you for the full amount, redeemable against any other Acuity Forums conference. If you prefer, you may request for a refund of fees paid less \$150 administration fee. Registrants who cancel after the above date will not be eligible to receive any credits or refunds and are liable for the entire registration fees. Confirmed delegates who do not cancel by September 11, 2009, and fail to attend, will be liable for the entire registration fee. Acuity Forums reserves the right to change the date, location and content for the event(s) offered herein without further notice and assumes no liability for such changes.

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