

## 2007 ARMA CANADA CONFERENCE PROGRAM

TIME	SUNDAY, June 3 <sup>rd</sup> , 2007	
1:15 – 4:30	<p><b>S31</b>  <b>Words to Action – Real Change</b>                      Robert Lamadelaine                      Canada Post</p> <p>Awareness of the need for the traditional records and information management (RIM) disciplines has re-emerged as a cornerstone supporting accountability. Canada Post, recognizing the need, made a commitment to its board to improve records management. Technology centric approaches were rejected. A low cost, low resource, but effective solution was sought to create a records management program that would reach every desk. The first step was to update the records management policy to establish a framework for change, incorporating accountability, ISO 15489 as standard, and records management direction, expertise, and oversight roles. A continuous improvement approach was agreed upon:</p> <ul style="list-style-type: none"> <li>• Best practices and awareness program</li> <li>• Process improvement approach to key RIM activities</li> <li>• Information directory of corporate repositories</li> <li>• Risk assessment tool for setting priorities</li> <li>• RIM Capabilities Assessment tool</li> <li>• Compliance audit tools</li> </ul> <p>The presentation and discussion session will be a walkthrough of the change process and tools developed by Canada Post. The choices and options made will be explained. Participants faced with similar challenges and constraints in a large corporate or public institution will be able to apply the concepts, tools and techniques within their organizations to affect similar changes.</p>	<p><b>S32</b>  <b>Master Your Career and Build Your Life</b>                      Debbie Christofferson                      Sapphire-Security Services LLC</p> <p>All myths of job security shattered in the past few years of downsizing, outsourcing, off-shoring and a shrinking US job market. The only guarantee is the one we make ourselves. Find out how to succeed in any market in any career:</p> <ul style="list-style-type: none"> <li>• Taking stock of yourself</li> <li>• Creating your success roadmap</li> <li>• Identifying and exploiting hidden opportunities</li> <li>• Bulking up your muscles</li> <li>• Selling yourself</li> <li>• Boosting your existing career</li> </ul> <p>This session will help you manage your career development plan just as you would any critical project plan. You will apply the critical thinking for defining a strategy, goals and key milestones and timelines. You will net new and focused results when you shift to this focused approach.</p>

## 2007 ARMA CANADA CONFERENCE PROGRAM

TIME	MONDAY, June 4 <sup>TH</sup> , 2007			
7:30-8:30	CONTINENTAL BREAKFAST			
8:30 - 9:30	<p style="color: red; text-align: center;"><b>Trends in Records Management</b></p> <p style="text-align: center;"><b>Susan McKinney CRM</b> President, ARMA International</p>			
9:30 - 9:45	EXHIBIT HALL GRAND OPENING (LAUNCH)			
9:45 – 12:00	EXHIBIT HALL VIEWING & Refreshments			
12:00-1:15	LUNCH & EXHIBIT HALL VIEWING			
1:15 – 2:30	<p><b>M31</b></p> <p><b>Are You Prepared For The Next Disaster?</b> Jerry Kofsky Munters Moisture Control Services</p> <p>"The only thing harder than planning for an emergency, is explaining why you didn't". This session will explore key concepts in records management disaster preparedness by incorporating lessons learned from real case studies. It will identify:</p> <ul style="list-style-type: none"> <li>• What to do when faced with a disaster or emergency</li> <li>• What to do when time is not on your side</li> <li>• How to prepare business continuity and disaster plans/strategies</li> <li>• The importance of emergency response and disaster team readiness</li> <li>• How to ensure employee safety and minimize loss</li> <li>• Why insurance loss coverage is important</li> <li>• Reasonable expectations regarding pre and post loss outcomes</li> <li>• Where to find help and other resources</li> </ul>	<p><b>M32</b></p> <p><b>A Tale of Two Projects: Project Management Approaches</b> Debra Power Public Works &amp; Government Services Canada</p> <p>Over the last 10 years there have been a few 'hits' and a few 'misses' as we delivered information management solutions to the Canadian Federal Government. Receiving great reviews from one successful project did not necessarily translate to success at another department. Often a missing factor to a successful new solution is the direct relationship between 'new functionality' and 'old processes.' A 'records' focused implementation and a 'business process' implementation are two diverse tactics used for deployment. This session is a comparison of the project management methodologies utilized for the two projects, Heritage Canada and Public Safety and Emergency Preparedness Canada (PSEPC). Heritage Canada has developed a 2010 GamePlan. An information management solution that meets the business need of event planning activities and the management of resulting information. Public Safety and Emergency Preparedness Canada will meet its information management mandate with the rollout of RDIMS. A Canadian Federal Government solution for records and document management.</p>	<p><b>M33</b></p> <p><b>Developing an EDRM Program from the Ground Up</b> Deborah Kinakin/ Shelly DiGiovanni Provident Energy Ltd.</p> <p>Provident Energy, a relatively new company in the energy sector in Calgary, identified in early 2006 that a comprehensive records and information management program was needed in order to meet challenge of achieving and maintaining SOX compliancy. This case study will present what steps have been taken to date, what has worked, what has not, and how they are reevaluating their approach and making changes in order to develop a comprehensive, thorough records and information management program. The resulting program will support Provident Energy as it undertakes future acquisitions and divestitures and continues to grow.</p> <p>This session will identify:</p> <ul style="list-style-type: none"> <li>• What works</li> <li>• What does not work</li> <li>• How to reevaluate to make the best decisions</li> </ul>	<p><b>M34</b></p> <p><b>Comment développer un cours de formation en gestion des documents - French Session</b> Jean Pierre Carrière Carrière Records Management Inc.</p> <p>Lors de cette session, nous verrons le squelette d'une activité de formation c'est-à-dire, l'objectif général et les objectifs spécifiques, le contenu de formation, l'approche pédagogique et le mode d'évaluation. Nous identifierons ensemble que veut dire le mot FORMER soit : Fondement de la formation; les Objectifs de la session; les Ressources utilisées; les Méthodes employées; l'Évaluation de la session de formation et la Rétroaction. On identifiera comment préparer un plan de cours. Finalement nous ferons un rapprochement entre l'adulte à son travail et l'adulte en apprentissage par exemple : L'adulte veut des résultats à court terme et il veut constater rapidement ses progrès en apprentissage. L'adulte a acquis des habiletés et des connaissances dans sa vie et en apprentissage, il connaît déjà beaucoup de chose. L'adulte vit aujourd'hui dans une société en constante évolution, il veut donc s'équiper en fonction de cette évolution constante. Toute démarche naît d'un besoin à combler donc tout apprentissage, chez l'adulte, vise la réponse à un besoin. L'adulte est un animal social c'est pourquoi il aime apprendre en groupe. L'adulte apprend beaucoup par l'action. L'action est un excellent médium pour faire des apprentissages.</p>

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2:30 – 3:00	REFRESHMENT BREAK & EXHIBIT HALL VIEWING			
3:00 – 4:15	<p><b>M41</b></p> <p><b>Importing Electronic Records into an EDMS – a Case Study</b> Charlie Jahn Condor Consulting</p> <p>Importing electronic documents into an EDMS is not a difficult task. In fact, from a technical perspective, it's quite simple! The big issue is.....once they're in there, can you find them again? Making cavalier assumptions about the retrieval capability of the application is a very bad idea. Statements like "Don't worry, once you get it into the system, you can set up a search criteria to find anything", will get you into trouble every time. If you haven't done your homework, you could be in for a few surprises.</p> <p>This session will look at a typical project in a government organization where the client discovered that the 'day-forward' approach was not sufficient to meet the information needs and had to import a large number of documents from both their shared drive and their e-mail system into the document manager. In preparing to undertake this work, the client assumed that a few documents with cryptic names would have to be re-named and then everything would be bulk imported. On closer examination, it became apparent that it would not be so simple.</p> <p>Issues that we will address include:</p> <ul style="list-style-type: none"> <li>• Naming conventions</li> <li>• Access rights</li> <li>• Bulk importing</li> <li>• E-mail attachments</li> <li>• Retention</li> <li>• Quick searches</li> <li>• Keywords</li> <li>• And more</li> </ul> <p>Whether you're importing documents one at a time, or in bulk, this session is intended to illuminate the issues that you may be facing so that you can make informed decisions on how to proceed.</p>	<p><b>M42</b></p> <p><b>Needs Assessment to Implementation – The Management View</b> Rick Stirling Western Information Mgmt Inc.</p> <p>Senior management must gain an understanding of the information management continuum from needs assessment, gap analysis and business case development through RFP process and final implementation of an enterprise solution.</p> <p>This presentation will deliver a high level management overview of this process with a focus on potential pitfalls and wins. You will learn how to:</p> <ul style="list-style-type: none"> <li>• Apply content to your corporate strategy</li> <li>• Develop an overarching strategy for enterprise implementation of an information management solution</li> <li>• Identify components of a successful strategy for corporate implementation</li> <li>• Recognize potential pitfalls in existing strategies</li> </ul>	<p><b>M43</b></p> <p><b>Show Me The Money: ROI for Records Management</b> Steve Neilly, CRM Corporate Designed Solutions, Inc.</p> <p>This session is designed to assist Records Managers in defining what Return On Investment (ROI) is required by their organization, how to define the measures to demonstrate ROI and introducing systems and technology to create ROI opportunities. Supporting ROI claims is important when trying to justify the expense of new equipment, technologies, training, staff or systems.</p> <p>Attendees will be able to</p> <ul style="list-style-type: none"> <li>• define ROI in a typical RIM program.</li> <li>• establish measures for ROI opportunities.</li> <li>• establish sources for justification of ROI opportunities.'</li> </ul>	<p><b>M44</b></p> <p><b>La gestion de l'information ou la gestion des documents: C'est quoi? - French Session</b> Jean Pierre Carrière Carrière Records Management Inc.</p> <p>Lors de cette session nous allons voir qu'est-ce qu'un document? Qu'est-ce la gestion des documents? Qu'est-ce que la gestion de l'information. Nous allons démystifier tous ces termes qui nous semblent à prime à bord synonymes mais différents. Parlons donc de la gestion de l'information consignée. Il y a trois volets majeurs dans cette grande discipline : La gestion des documents qui comprend les éléments suivants : La création qui traite de la gestion des formulaires, de la correspondance, la rédaction de rapports, la normalisation et le contrôle des politiques et des directives. Deuxièmement l'organisation et l'utilisation qui consiste à organisation du courrier et aussi les courriels, les systèmes de classification ( ici nous profiterons de l'occasion pour donner quelques explications sur le comment développer un plan de classification basé sur les fonctions), la normalisation des fournitures et des équipements de rangement, la centralisation et la décentralisation des dossiers ainsi que la protection des documents essentiels. Troisièmement la conservation qui comprend le calendrier de conservation (ici nous démontrerons les composantes d'un calendrier de conservation), la mise sur pied de centres de documents semi-actifs et finalement la destruction ou le versement aux archives. Parlons maintenant de la gestion des Archives. Cette discipline consiste à acquérir, évaluer et sélectionner les documents à valeur historique, de voir à leur traitement soit le classement, la restauration, la conservation et la préservation et finalement la mise ne valeur de cette richesse. Comme troisième volet, il y a la gestion des documents de référence qui comprend le l'acquisition le catalogage, les prêts aux utilisateurs, l'assistance à la recherche etc. Maintenant que nous savons ce que c'est nous verrons les étapes à franchir pour réaliser un tel projet soient : L'étude préliminaire, le plan d'action, le développement, l'implantation, la participation des utilisateurs et la formation et finalement le suivi.</p>

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7: 30- 8: 30	<b>CONTINENTAL BREAKFAST</b>			
8: 30 – 9: 15	<p style="text-align: center;"><b>Plenary Session</b></p> <p style="text-align: center;"><b>Microsoft Enterprise Content Management for a People Ready Business</b></p> <p style="text-align: center;"><b>Elizabeth Caley</b> Microsoft Canada</p> <p>Despite great advances, ECM today is still a specialized solution that is typically applicable to a small set of users in an organization. Microsoft's vision is to transform ECM and make it broadly available to every employee. Attend this session to hear how Microsoft's approach to ECM will amplify the impact of every employee in an organization while giving IT the ability to provide the right level of governance to meet compliance and legal requirements.</p>			
9: 30 – 10: 45	<p><b>T11</b> <b>Electronic records keeping for Microsoft 2007</b> Bruce Miller RIMtech</p> <p>Microsoft has included significant retention and recordkeeping capabilities in Office 2007, particularly Outlook/Exchange, MS Word, and SharePoint. Attend this session to hear an overview of these capabilities, and how to utilize them to meet electronic recordkeeping obligations. Learn about typical challenges and barriers to implementation, including business culture and policies, user complacency, technological issues, and more. Learn what you need to do, and how, to implement this technology successfully. A structured approach to implementation including clear goals, specific tasks, and measurable outcomes will also be reviewed.</p> <p>Session attendees will be able to:</p> <ul style="list-style-type: none"> <li>• Understand the recordkeeping capabilities of the new Microsoft upgrades.</li> <li>• Develop a clear plan for implementation that sets specific goals and timelines, measurable</li> <li>• outcomes and results to prove that your project is meeting its objectives.</li> </ul> <p>Produce a realistic estimate of the costs, resources, and skills required for technology implementation.</p>	<p><b>T12</b> <b>Where Are We Going Now?</b> Kit Bright Pen West Energy Trust</p> <p>Now is the time to look at our roles in the RIM Industry as professional positions. With ARMA International completing its Core Competencies Project outlining the roles of the RIM professionals, they will be approaching the various Human Resource Benchmarks to ensure that RIM is a profession that is part of any human resource survey. This will address the long required designation requirements and appropriate compensation needs. This presentation will also evaluate relevant skill sets, levels and pay scales based on these levels. Kit will also be addressing what management skill sets we need to acquire to ensure continued respect and potential promotion ability.</p> <p>This presentation will outline skills that we will need to acquire in order to move up the corporate ladder, concentrating on the requisite presentation skills and necessity of our services to manage the current business requirements, positioning ourselves for the future escalation of compliancy in the industry.</p> <p>Kit will be addressing the current RIM world, as it is viewed presently, and then excite you with her future vision and positioning of the profession for this exciting career evolution.</p>	<p><b>T13</b> <b>Auditing a Records Program</b> David Hopkins Alberta Ministry of Finance</p> <p>Records management programs, like all business activities, do not exist in a vacuum. They must keep abreast of current trends and new developments, both technological and business-related. They must prove their worth in order to best compete for scarce budget dollars. They must be prepared to ward off the threat of outsourcing, which is more real in today's increasingly 'cost-effectiveness' environment than typically was the case in the past. In short, there are a number of factors that demand that records management programs be as efficient and streamlined as possible.</p> <p>A records management audit is the first step in improving the services and structure of a corporate records management program. Simply put, a records management audit constitutes an official examination and verification of the current state of records management activities and functions. The data collected and analyzed as a result of the audit will enable records managers to identify both strengths and deficiencies, including the respective degrees of both. The audit findings will also allow for best decisions to be made concerning the most practical and timely means of addressing any shortcomings.</p> <p>This session will discuss how to conduct a records program audit, including developing and using an audit tool, collecting and analyzing data, and presenting results and recommendations.</p>	<p><b>T14</b> <b>Essentials of Recorded Information Management: What First Nations Organizations Need to Know</b> Alexandra (Sandie) Bradley Harwood Information Associates</p> <p>Information in all formats is a crucial resource for first nations government organizations. The purpose of this session is to discuss the fundamental requirements of information management from a First Nations organization perspective. The standards and best practices for recorded information management will be discussed, including ISO 15489 and CGSB standards for managing electronic information formats as evidence. As described in the ISO standard, the basic instruments for managing records, including records policies, records classification, retention schedules and security classifications will be examined. In addition, the specific requirements that First Nations organizations must consider, including preservation strategies for specific information formats, cultural issues for privacy and security, and the contracted obligations that may impose additional requirements. The competencies for staff and sources for staff training will also be presented.</p> <p>By participating in this session, attendees will:</p> <ul style="list-style-type: none"> <li>• Become familiar with the fundamental requirements of recorded information management;</li> <li>• Become familiar with the specialized knowledge and skills required of the records management staff;</li> <li>• Obtain specific sources to assist with the development of policies, procedures and strategies for implementation of records management programs;</li> <li>• Be aware of the specific requirements or issues affecting their organizations' records.</li> </ul>
10: 45 – 11: 15	<b>REFRESHMENT BREAK &amp; EXHIBIT HALL VIEWING</b>			

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11: 15- 12: 30	<p><b>T21</b> <b>E-mail deployment</b> David Rintoul GlaxoSmithKline Canada</p> <p>This case study will review the positive lessons learned from the deployment of eMail management software enterprise wide to a user community of 2,000 employees. Topics will include project planning, communication strategies, training and coaching, records classification, records retention, project management, pitfalls and lessons learned. Session participants will learn how one organization reduced its email holdings by 68% and established an employee compliance level of 99%.</p> <p>The session will:</p> <ul style="list-style-type: none"> <li>• Explain the value and benefits of implementing email management software</li> <li>• Outline the critical success factors for deployment</li> </ul> <p style="padding-left: 20px;">Share pitfalls and lessons learned from the experience</p>	<p><b>T22</b> <b>Bridging the RIM/Privacy Divide in the Public Sector</b> Gita Werapitiya Mount Royal College</p> <p>The freedom of information and protection of privacy legislation is intended to support a "culture of openness". The legislation is driving public post-secondary educational institutions to reconsider their records and information management practices in order to comply with the <i>Act</i> and promote transparency and accountability in the operation of their institutions.</p> <p>The session will review the key principles associated with the culture of openness under the <i>Act</i>. Although records and information management is separate from the <i>Act</i>, the RIM considerations that apply to each of the principles will be discussed.</p> <p>The session will also be a forum for practitioners to:</p> <ul style="list-style-type: none"> <li>• have an open dialogue on specific challenges they face on providing access to records, protecting personal information</li> <li>• identify RIM best practices in order to support a culture of openness</li> <li>• examine RIM considerations in order to comply with privacy legislation</li> <li>• discuss challenges/solutions to bridge RIM and privacy</li> </ul>	<p><b>T23</b> <b>Revising A Conventional Classification Plan for Electronic Use</b> Lois Enns District of West Vancouver</p> <p>Record classification is the central point of reference in the transition from managing records in a paper environment to managing records with an electronic document management system (EDMS).</p> <p>This session is designed for people who are not yet managing an EDMS and are interested in learning about its basic features and for people who have implemented an EDMS and are interested in how a conventional record classification performs in this environment.</p> <p>We will also review strategies for revising a record classification before and after implementation.</p>	<p><b>T24</b> <b>Accounting Information – Life Blood</b> Chad Bicklmeier West Region Tribal Council Health Department (Aboriginal Financial Officers Association of Canada)</p> <p>Money is the lifeblood of most organizations. Controlling this lifeblood is critical to having the organization perform at its peak or optimum level and sustaining that performance over the long term. This is where financial records become extremely important. First Nations self-government discussions need to be directly linked to self-sufficiency, financial independence. As it is for an individual, it is for a nation, financial independence can only be gained through control of money/resources.</p> <p>The purpose of this session is to discuss the fundamental requirements of a First Nations accounting information system (AIS). We will address both paper and electronic financial information management, including specific First Nation agreement(s) requirements. We will touch on GAAP, PSAB, tax issues (GST/PST/Income Tax), legislation, funding agreement types, accounting policy/strategies and financial reporting, including potential conflicts in the needs of primary users of the financial information. We will also address startup issues such as the structuring of departments and vendors within a computerized AIS and of source document filing, retention and audit requirements. Time will be allotted at the end and through the presentation to address related specific issues of concern.</p>
12:30 – 1:45	<b>LUNCH &amp; EXHIBIT HALL VIEWING</b>			
1: 45 – 3:00	<p><b>T31</b> <b>'Twas the Night before Implementation (And all through the house Not a program was working not even a browse)</b> Penny Quirk PJ Quirk &amp; Assoc.</p> <p>We've all been through the horror of having everyone show up to install a new software application only to find that important questions, decisions and processes have not been determined. There are virtually hundreds of triggers, decision, defaults, and workflow processes that must be considered prior to installation. This session will provide for the participants a breakdown of items,</p>	<p><b>T32</b> <b>Functional and Faceted Classification in Practice</b> Connie Christensen Synercon Management Consulting</p> <p>This presentation details how functional classification has been implemented in Australian organisations over the past 8 years and lessons learned in the process. It examines where functional classification fits within other classification facets and how well it meets the needs of users and records managers.</p> <p>The session will identify:</p> <ul style="list-style-type: none"> <li>• What functional classification is used for and how it differ from other types of classification</li> <li>• How functional classification fits with other classification models</li> <li>• How functional classification can be made easier for end</li> </ul>	<p><b>T33</b> <b>Towards a More Holistic Approach to Records and Information Management – Semi Automatic Classification and More</b> Yves Marleau Cogniva</p> <p>Large organizations, both in the public and private sector, face many issues arising from inconsistencies in the management of its information resources. Several knowledge representation tools such as classification plans, taxonomies, ontologies, thesauri and metadata standards, are now devoted to the organization and the normalization of corporate information. Unfortunately, even if there is a strong requirement for an alignment within records, documents, web content and archives continuum, knowledge tools are often used in isolation. Interrelations, complementarities, overlaps and redundancies between these tools need to be identified and analysed to build the foundation for a new integrated Information Architecture. Cogniva has</p>	<p><b>T34</b> <b>Plans for a Redesign of Siksika Nation's HR Records Management Plan</b> Shirley Spotted Eagle Siksika Nation</p> <p>Shirley Spotted Eagle will summarize how the Siksika tribe has kept its records historically from its traditional cultural roots to today's electronic, computer focused age. The need for formal records management systems and the Siksika tribe's plans for establishing these systems will be shared.</p> <p><b>Partnering to create successful solutions to Aboriginal training to employment issues</b> Vanessa Everett SAIT A One of a kind program in Aboriginal Community Records</p>

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	<p>applicable tools, and techniques on how to mitigate the risk of an installation/deployment going awry.</p> <p>Attendees will have the opportunity to logically solve obstacles that can impede the process from the implementation plan to the deployment/rollout of a new or updated software application.</p> <p>This interactive workshop provides for group collaboration in the area of developing business case, software and system requirements, vendor selection, implementation guidelines, pilot program testing, and production rollout. Attendees gain perspective from high energy interaction.</p> <p>(continued in part 2)</p>	users	<p>developed an innovative holistic approach to unify IM standards and produce efficient IM tools that can help create overarching information architecture and automate many of the IM/RM tasks. Cogniva's <i>Holistic Information Architecture Solution</i> (HIAS) aims not only at standardizing the representation of information objects, but also at simplifying the management of information throughout its entire life cycle for both individuals and organizations while ensuring compliance to regulatory and policy requirements.</p> <p>Session participants will:</p> <ul style="list-style-type: none"> <li>• Get a better understanding of IM-RM issues in large organizations</li> <li>• Get an understanding on how Cogniva's informative integrated information architecture approach can resolve most of these IM-RM issues</li> <li>• See how the approach is being used in a large in a large international organization</li> </ul>	<p>Information Management, created and delivered at SAIT, two years ago won recognition from ARMA International. The program was created by SAIT in close collaboration with Xerox Canada and the Calgary Chapter of ARMA International and saw its first pilot students, records managers from aboriginal communities, graduate in June 2006. Realizing the unique nature of this initiative, the local Chapter of ARMA International entered the Aboriginal Community Records Information Management program in the special projects category at the association's conference in Chicago where it was recognized with the 2004-2005 Special Project of the Year Award. The Program is aimed at helping aboriginal communities preserve and protect their current and historical documents. Learn why and how this program was created, and its successes.</p>
3:00 – 3:15	<b>REFRESHMENT BREAK &amp; EXHIBIT HALL VIEWING</b>			
3:15 – 4:30	<p><b>T41</b> <b>'Twas the Night before Implementation – pt 2</b></p> <p>Participants will:</p> <ul style="list-style-type: none"> <li>• possess the skills to identify, participate, direct and assist in the implementation process of RIM software applications.</li> <li>• have the ability to target potential trouble areas early in the roll-out process.</li> <li>• be able to develop application requirements and measure their success.</li> <li>• be provided with supporting templates: <ul style="list-style-type: none"> <li>• RIM Requirements Check List</li> <li>• Software Vendor Evaluation Templates</li> <li>• Infrastructure Inventory Template</li> <li>• Software Configuration Template</li> <li>• Quick-Check, defaults common in RIM Software Applications</li> </ul> </li> </ul> <p>ROI Calculation workbook</p>	<p><b>T42</b> <b>Leveraging Your Governance Model: Selection and Deployment of Electronic Records Management Software</b></p> <p>Marcus Leja TAB Products of Canada</p> <p>Canadian organizations are recognizing the operational and compliance value associated with their business records, regardless of medium. This discussion will address the demands associated with the widening scope of organizational RM programs through the use of electronic RM software solutions. It will outline key business process questions organizations must ask of themselves before the technology procurement process. Strategies will be offered to help introduce the cultural changes required for successful electronic records management. Perspectives will be given to demonstrate the inherent value of electronic RM procedures throughout the organization, from senior management all the way to front-line staff. Common user and technical issues around deployment and implementation of electronic RM software will be outlined. Criteria for assessing the success of the RM software implementation will also be provided.</p>	<p><b>T43</b> <b>Educating the Masses: Developing and Implementing Computer Based IM Training</b></p> <p>Garry Lariviere AECL</p> <p>All information management professionals know and understand that it can be quite a challenge to educate employees on appropriate information management practises. Statistically, approximately 80% of an organization's information is unmanaged, and if left unchecked, organizations run the risk of losing these unmanaged information assets permanently.</p> <p>This session explores how Atomic Energy of Canada Limited (AECL) faced the challenge of developing an e-learning environment relating to the fundamental principles of Information Management (IM). The session focuses on how AECL took these IM principles, and developed a simple, 5-step easy to understand on-line resource that incorporates a series of Computer-Based Training modules. This approach allows employees to take any of the modules as refreshers at any time.</p> <p>The session will explore what went right, what went wrong, and offer participants a concept in how to introduce and communicate IM education programs into their organizations.</p>	<p><b>T44</b> <b>Records Management from a Traditional Knowledge Perspective</b></p> <p>Henry Bighthroat/ Clara Rutherford Red Crow College/ Yukon Archives</p> <p>Red Crow College is involved in a number of records collection initiatives relating to First Nations. This session will discuss the actions taken and lessons learned when:</p> <ul style="list-style-type: none"> <li>• Creating an electronic database to serve as an online electronic Blackfoot Digital Library resource for Blackfoot material culture and accessions including records from museum collections around the world as well as other sources such as government documents and photographs.</li> <li>• Developing a Traditional Knowledge and Land Use Study to identify, record and map sacred sites, medicinal herbs, etc. for the purpose of protecting and conserving Traditional Blackfoot Territory.</li> <li>• Capturing Blackfoot Family Geneology by interviewing Blackfoot family elders to record their blackfoot family names and find out how and where these names come from and the families associated with these names.</li> </ul> <p>Clara Rutherford will explore the status of First Nations heritage, cultural, and information institutions in the Yukon and the issues facing them as they preserve their oral and written archival record. Her paper will discuss the role the Yukon Archives and the Yukon Archival Advisory program has had in assisting the First Nations with their emerging archives.</p>

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TIME	WEDNESDAY, June 6 <sup>TH</sup> , 2007			
7:30- 8:30	<b>CONTINENTAL BREAKFAST</b>			
8:30 – 9:45	<p><b>W11</b>  <b>Records Media Formats: Choosing the Most Appropriate Option(s)</b>                      David Hopkins                      Alberta Ministry of Finance</p> <p>Corporate records typically exist in any of three primary media formats: paper, microform, and electronic. Yet the determination of whether a particular record media format is truly suitable is often not undertaken when deciding to invest (or not) in various information technologies and/or restructured business processes. Failure to take this step may result in inefficient information workflow, failure to receive maximum payback from technology solutions, and/or unnecessary financial expenditures.</p> <p>The realization that there is no one media format that is suitable for all records, in all organizations, and under all circumstances, is an important concept for records practitioners and corporate personnel in general to grasp. The concept of a 'paperless office' will not be realized; it is highly unlikely that microfilm/fiche will become totally obsolete; and although electronic records will continue to increase in volume and importance, they will never satisfy all corporate and personnel needs. Rather, various media formats complement rather than supplant one another, and workplaces will benefit from utilizing the media format that is most suitable under a particular set of circumstances.</p> <p>This presentation will allow participants to:</p> <ul style="list-style-type: none"> <li>• Understand the strengths and deficiencies of the three primary media formats as they relate to corporate functions.</li> <li>• Realize that there is no one media format that is suitable for all records, in all organizations, and under all circumstances.</li> <li>• Understand the high-level process to follow to determine the most appropriate media format(s).</li> </ul>	<p><b>W12</b>  <b>Happy Trails to you ... the Ethics of Metadata</b>                      Susan Rock, CRM/ Joanne Wiens                      The Rockfiles Inc./ Coherent Information Systems Inc.</p> <p>With the increasing use of robust records and document management systems, we know that metadata fields populated with data relevant to the business itself is very powerful. We also know that some metadata fields can be changed to suit changing business requirements. Metadata changes are tithed to the security model (permissions) agreed to by business. Metadata changes can also occur when legacy data is loaded into the system without due care and planning.</p> <p>What role does the records manager have to protect the integrity of metadata when it would seem perfectly logical to a business unit to change it? What is the impact of metadata change on business assumptions about the integrity of RM/DM systems?</p> <p>Let's examine metadata and its evolution – is it as trustworthy and evidentiary as we believe? Are records managers exercising their code of responsibility when participating in the implementation of records and document management systems?</p> <p>We all have a record; we're all being recorded. Happy trails to you ...</p>	<p><b>W13</b>  <b>Applying the Electronic Records as Documentary Evidence Standard</b>                      Regina Landwehr                      University of Calgary</p> <p>Since the Electronic Records as Documentary Evidence standard (CAN/CGSB-72.34-2005) appeared in its final form in December of 2005, very few reported cases of applying the standard in the field have appeared. This is a case study from the University of Calgary which demonstrates how this standard was used to test compliance of a document scanning system for student records which makes digital copies of student records available in the university's student information system. The presentation will describe the methods used to conduct the testing and analysis of the system, reports on the findings, and the final outcomes in terms of the impact on records retention requirements for paper and digitized student records. This presentation will also make some comments on the ease of using the standard itself and what can be learned for future compliance testing cases of electronic document management systems. As its final objective this presentation hopes to contribute to a better understanding of the standard and how it can be applied.</p>	<p><b>W14</b>  <b>CRM prep – pt 1</b>                      Steve Golden / Christine Ardern</p> <p>RBC Dain Rauscher/ The Information Management Specialists</p> <p>The ICRM is ARMA International's certifying body, and the CRM designation is a credential of distinction within our profession. In this session, CRMs will convey details about the Institute of Certified Records Manager's application process as well as a practical look at the content of all six parts of the CRM exam.</p>
9:45 – 10:00	<b>REFRESHMENT BREAK</b>			

## 2007 ARMA CANADA CONFERENCE PROGRAM

TIME	WEDNESDAY, June 6 <sup>TH</sup> , 2007			
10:00 – 11:15	<p><b>W21</b> <b>Raising the Bar – Improving the Design &amp; Architecture of EDRMS Solutions</b> Connie Christensen Synercon Management Consulting</p> <p>The presentation examines how EDRM systems can be designed more intelligently; by both system implementers and software designers. It addresses how we can:</p> <ul style="list-style-type: none"> <li>• Incorporate new and existing functionality into EDRM systems - such as thesaurus based searching - which could facilitate easier searching for the business user.</li> <li>• Make use of known relationships (i.e. between people, functions, processes) to facilitate more systematic capture of information</li> <li>• Create more flexible classification models which enable different views for different types of users.</li> <li>• Facilitate the automation of retention management by linking knowledge (captured through the DIRKS analysis) which may indicate the retention value of records.</li> <li>• Analyze business requirements to create improved models for EDRM design; and</li> <li>• Translate business requirements into rigorous software design specifications.</li> </ul>	<p><b>W22</b> <b>Researching Records Retention Requirements in Canadian Law</b> Sheila Taylor / Rob Gerrie CLARA (Condar Consulting) / Regional Municipality of Niagara</p> <p>Whether you work in a public, private or not-for-profit organization, Canadian laws and regulations will require your organization to create and retain various types of records.</p> <ul style="list-style-type: none"> <li>• Which records must your organization create and retain?</li> <li>• How long must your organization keep those records?</li> <li>• How can you identify those requirements?</li> </ul> <p>This presentation is designed to enable RIM professionals to answer those questions by providing a sound understanding of records retention requirements in Canadian law.</p> <p>This session will:</p> <ul style="list-style-type: none"> <li>• Review the Canadian legislative process – how bills become laws and how laws are amended. Examine the resources (some of which are freely available on the Internet) you can use to identify and track the laws which apply to your organization.</li> <li>• Examine a research methodology and take a look at how retention periods are expressed (sometimes implicitly) in Canadian laws and regulations.</li> <li>• Examine the role that limitation periods can play when determining records retention periods.</li> </ul>	<p><b>W23</b> <b>Managing Corporate Memory: Where Does RM Fit?</b> Cheryl McKinnon Open Text</p> <p>Numerous studies in Canada and the US are projecting a substantial shift in the workforce demographic as the Boomer generation approaches retirement age. Sectors at most risk include government, utilities, engineering, transportation and manufacturing. How can Records Management professionals play a strategic role as our workplace transforms? Records retention, corporate memory preservation and protection of intellectual capital are areas that will be at risk in the coming decade. Planning now can mitigate risk and ensure organizational continuity is achieved.</p> <p>This session will help you to</p> <ul style="list-style-type: none"> <li>• understand current demographic and workforce trends</li> <li>• Begin to plan for a shift in your own work environment</li> </ul> <p>Consider best practices and ensuring the influence of the Records Management professional in the workplace transformation</p>	<p><b>W24</b> <b>CRM prep – pt 2</b></p>
11:30 – 12:15	<p><b>W31</b> <b>The Future For Electronic Records Management</b> Bruce Miller RIMtech</p> <p>A look in the crystal ball to speculate about what the future holds in store for the management of electronic records.</p>	<p><b>W32</b> <b>The RM Future For Compliance</b> Stuart Rennie Barrister &amp; Solicitor Records and Information Management Consultant</p> <p>A look in the crystal ball to speculate about what the future holds in store for the management of records from a compliance perspective.</p>	<p><b>W33</b> <b>The RM Future For Document Discovery</b> Susan Rock The Rockfiles Inc.</p> <p>A look in the crystal ball to speculate about what the future holds in store for the management of records from a document discovery perspective.</p>	<p><b>W34</b> <b>The Future For Records Management as a Profession</b> Christine Ardern The Information Management Specialists</p> <p>A look in the crystal ball to speculate about what the future holds in store for records management as a profession.</p>
12:15– 1:45	<b>LUNCH AND FREDERICTON LAUNCH</b>			
1:45 – 2:30	<p style="color: red;"><b>ENDNOTE</b> <b>The Power of Laughter</b></p> <p><b>Rolande Kirouac</b></p>			