Join federal & provincial government and private-sector IM experts as they discuss information & records management

6th Electronic Documents and Records Management

Improve operational efficiency and IM performance through successful EDRM implementation

Course Leader
Stephen R. Donahoe, CGI Information Systems & Management Consultants Inc.

Khaled El Emam, University of Ottawa and Children's Hospital of Eastern Ontario Research Institute

Patricia Kosseim, Office of the Privacy Commissioner of Canada

Raphael Sussman, Ministry of Natural Resources (Ontario)

Bobby Singh, Rogers Communications Inc.

Irina Krasteleva, CGI Information Management

Bruce Miller, RIM Technologies

Lindsay Fraser, Systemscope

Jane Gadoury, City of Ottawa

Tony G. Horava, University of Ottawa

Charlie Jahn, CONDAR Consulting Inc.

Sean McCaffrey, City of Ottawa

as well as:

André La Prairie, Public Health Agency of Canada & Office of the Assistant Secretary for Preparedness and Response (DHHS/OS/ASPR)

Debra Power, Canadian Heritage

Clare Whittingham, Niagara Region

Workshop Included: What Every IT Manager Needs to Know About ERM

participating organizations

Canadian Heritage
CGI Information Systems & Management Consultants Inc.
Children's Hospital of Eastern Ontario Research Institute
City of Ottawa
CONDAR Consulting Inc.
Ministry of Natural Resources (Ontario)
Niagara Region
Office of the Privacy Commissioner of Canada
Public Health Agency of Canada
RIM Technologies
Rogers Communications Inc.
Systemscope
University of Ottawa

who should attend

Chief Information Officers, Chief Knowledge Officers, Directors and other senior-level Civil Servants at all levels of government involved in records management, document management, information management, information systems, archives, knowledge management, library services, content management, e-government, project management, intranet communications, information services, information technology and database management

course highlights

- Hear the latest from IM experts and leaders in the federal and Ontario government as well as the private sector
- Explore a information management model that is relevant to the dynamic needs of information users and organizations
- Gain insight into how EDRMS can fit into your overall IM strategy
- Explore how to make the case for EDRMS by defining business and technology requirements
- Learn how to install, configure and train IM users for maximum benefit
- Hear how an EDRM system can be used to further overall information management strategy
- Integrate EDRMS into business processes

COURSE LEADER

STEPHEN R. DONAHOE
Stephen Donahoe is Director of **CGI**'s strategic information management and enterprise content management consulting practice.

CO-LECTURERS

KHALED EL EMAM
Dr. Khaled El Emam is an Associate Professor at the **University of Ottawa**.

LINDSAY FRASER
Lindsay Fraser is **Systemscope**'s Practice Lead for Information Management.

JANE GADOURY
Jane Gadoury is an Information Management Analyst with the **City of Ottawa**.

TONY G. HORAVA
Tony G. Horava is Associate University Librarian (Collections) at the **University of Ottawa**.

CHARLIE JAHN
Charlie Jahn is a principal consultant with **CONDAR Consulting Inc**.

PATRICIA KOSSEIM
Patricia Kosseim is General Counsel of the **Office of the Privacy Commissioner of Canada** (OPC), where She oversees the Legal Services, Policy and Parliamentary Affairs Branch.

IRINA KRASTELEVA
Irina Krasteleva is the Lead Analyst for the **CGI Information Management** practice.

ANDRÉ LA PRAIRIE
André La Prairie is the Health Emergency Liaison Officer (Canada) in the **Office of the Assistant Secretary for Preparedness and Response (DHHS/OS/ASPR)**.

SEAN MCCAFFREY
Sean McCaffrey is currently the Acting Program Manager, IM/IT Architecture with the **City of Ottawa**.

BRUCE MILLER
Bruce Miller is President of **RIMtech**, a vendor-neutral e-records consulting services firm.

DEBRA POWER
Debra Power, with 10 years experience in the field of Information Management, is IM Business Architect at **Canadian Heritage**.

BOBBY SINGH
Bobby Singh, the Director of Information Security and Risk Management for **Rogers Communications**, has 16 plus years experience in information securityCI), Mr. Singh's.

RAPHAEL SUSSMAN
Raphael Sussman is currently Manager of Land Information Ontario within the **Ministry of Natural Resources (Ontario)**.

CLARE WHITTINGHAM
Clare Whittingham, MA Records Management - Electronic Records at **Niagara Region**.

COURSE PROGRAM

INTEGRATING EDRMS WITHIN AN OVERALL IM STRATEGY

Implementing an e-document and records management system within the department is always more challenging than just fielding another piece of desktop software. It is a complex change management program involving people, processes and technology. Far from providing just a filing system, the corporate record is now seen as providing the fundamental building blocks for information management within the organization. This discussion details what EDRM systems are and how they fit into the overall IM strategy.

· What is EDRM and how can your department benefit?
· Understanding how EDRM links to IT and business strategies
· Linking document management, records management and workflow·
· Where EDRM technology is heading and how it will affect
  the way government business is conducted

MAKING THE CASE FOR EDRMS

This discussion describes how to make the case for EDRMs by defining business and technology requirements through:

· Systematic identification of required EDRMS capabilities and EDRM infrastructure components focused both on organizational goals and detailed discovery of user requirements
· A comprehensive business case including risk assessment, cost/benefit analysis (using both "hard" and "soft" measures) and a roadmap for implementation
· A staged process of validation that exploits I&IT architecture and standards processes to help position EDRMs as an enterprise tool

SUPPLEMENTARY COURSE MATERIAL

Federated Press is now providing delegates with access to an innovative new database containing at least 25 interactive multimedia presentations by leading experts and approximately 20 hours of lectures on the topics covered by this course, including all slides and speakers' papers. See the list of presentations on page 4.

Delegates will also receive a trial subscription to the Technology Channel, a much broader resource representing hundreds of hours of interactive multimedia lectures on leading edge Technology topics as delivered at our many recent Technology conferences and courses.

AV PROCEEDINGS
Audio/Video segments clickable slide by slide
Papers and overheads also included
Print any of the material for your own use

"This has given me a much needed foundation to know where to start on gathering the requirements for our new EDRMS."

"Outstanding, very informative."

"Off the charts! I really know what I'm up against to implement EDRMS in my organization."

IMPLEMENTING THE EDRM SYSTEM

Once your organization is ready for implementation, how do you make sure it goes off seamlessly and that it delivers the results you require? How do you make sure the right policies are in place and will be followed? This discussion details how to install, configure and train users for maximum benefit.

· Defining the scope of the EDRM project
· Developing an action plan
· Critical role of change management in obtaining user buy-in

PLACE-BASED DATA: METADATA MANAGEMENT

Many new information products are "place-based" - meaning that geographic locations are added to other data to produce new information services. This presentation describes place-based information services and their close connection to Metadata management.

· The role of Metadata in sharing and using structured data
· Open Data and Crowdsourcing
· Merging of GIS data with other records

LINKING THE EDRM SYSTEM TO ORGANIZATIONAL GOALS AND STRATEGY

Organizations often deploy impressive information management systems from a technical point of view, but these systems end up not being used at all. This discussion will propose avenues to improve perception and understanding of EDRM.

· Creating the proper EDRM plan for your organization
· Ensuring your system meets organizational objectives in a tangible way
· Enhancing your organization's understanding of EDRM

FINDABILITY: SOLVING THE FINDADIBILTY CRISIS

With the exponential growth in information holdings that organizations are experiencing, locating and finding information is becoming more and more difficult. This session will explore methods that can be used to help make information searchable and, more importantly, findable.

· Strategies to be addressed at the content level itself
· Best practices for improving access to information across the enterprise

MANAGING ELECTRONIC INFORMATION WITHOUT AN EDRMS

This session will examine the opportunities and implications of managing e-mail and electronic documents in the modern office without the aid of electronic document management software. This session will and consider how to make better use of existing desktop tools.

· Key requirements and risks in managing electronic records
· How existing desktop applications can be used
· Where the investment should be focused to get some quick results

CASE STUDY: CHOOSING THE RIGHT EDRM SYSTEM

With a wide range of products available and a market that is often unstable, choosing the right EDRM system is a challenge. Although various packages claim to adhere to the same standards and need to be procured with the greatest of care. The University of Ottawa library acquired an electronic resources management system in 2006 called Verde, and this discussion will present their experience in choosing the right system.

· Carefully identifying the organization's requirements and culture
· Does the product have the capability to meet current and future requirements?
· What were the lessons learned?

DE-IDENTIFYING AND RE-IDENTIFYING DATA

Although the issues surrounding de-identifying and re-identifying data have come to the fore recently in connection with electronic health records, all EDRM and IM professionals need to be concerned with the associated privacy implications. In an age of data sharing and disclosure, IM must be aware of the privacy implications of sharing data.

· Privacy laws governing identifiable data
· Determining when data is identifiable
· The U.S. approach: implications for Canada

CASE STUDY: CROSS-BORDER PUBLIC HEALTH INFORMATION SHARING

Cross-border health information sharing between provinces, territories and states for the purpose of emergency preparedness and response has been ongoing for the past two decades. This presentation will focus on the records management issues in three border initiatives.

· Advances achieved in the past year
· Key gaps and issues
· Recommendations with respect to the sharing of public health information during significant events
· Concerns about the "institutional memory" of cross-border collaborations

MANAGEMENT OF STRUCTURED DATA

In today's business environment, numerous information repositories contain high value information that fall outside the class of EDRMS. What can be done to assess and mitigate any risks associated with managing information in these repositories is a key concern to EDRM and IM professionals. Not everything fits into the EDRMS box.

· A tested approach to addressing the management of structured data
· The structured information strategy
· Assessing and mitigating risks associated with managing information

WEB CONTENT MANAGEMENT (WCM) AND RECORD MANAGEMENT SYSTEMS

This session will provide best practices and common pitfalls for integration between web content management (WCM) solutions and record management (RM) systems - a common requirement for large companies and government organizations and local councils. What tools and interfaces are offered by major CMS platforms for such integration?

· Posting records and documents from EDRMS on public website
· Allowing website visitors to fill in online forms and edit documents
· Refresh and update site documents based on workflow in record keeping solution

WORKSHOP

WHAT EVERY IT MANAGER NEEDS TO KNOW ABOUT ERM

Most IT managers understand the pressing need to manage e-records, but lack the understanding of the science and software technologies of record keeping to implement an actual real-world solution. Attend this session to understand the language, fundamental principles and methods of modern record keeping, as well as the principles and techniques of e-record keeping, and learn about a new state-of-the-art roadmap for implementing e-records software technology.

· Understand the basic language, methods and principles of records management
· Understand the functional capabilities and limitations of e-record-keeping software
· Produce a realistic estimate of the costs, resources and skills required for technology implementation

MULTIMEDIA PRESENTATIONS

Your registration includes an interactive multimedia database comprising the following presentations from recent Federated Press courses and conferences. They are presented in their entirety with complete audio or video and accompanying slides. You may also purchase the multimedia proceedings of the course which will be available on CD-ROM 60 days after the course.

Access privacy issues relevant to EDRM
Kris Klein,
Kris Klein

**Data synchronization:
Educating business companies why & how**
Alison Bartlet,
Commport Communications International, inc.

**IM Strategy and Best Practices
from RDIMS**
Jeff Braybrook,
LNW Consulting

**Driving cultural change to ensure
successful EDRM implementation**
Caroline M. Andrews,
Department of Labour

Making the Case for EDRMS
Don Macleod,
Archives of Ontario

Developing EDRMS on a Shoestring
Jean Guy Morais,
Environment Canada

**Case study: Implementing a records/information
management program – Inquiry Liaison
Office (PWGSC)**
Angela Foran,
*Natural Resources Canada/
Records Management Institute*

**The Road to Incorporating Strategic
Data Management into Enterprise
Governance Structures**
Andrew J. Bystrzycki,
Service Canada

**The Elephant Under The Table: Managing
Structured Data within a Formal Records
and Information Management (RIM) Regime**
Lindsay Fraser, *Systemscope Inc.;*
Scott Procter, *Still Waters Consulting*

**E-Discovery Linking Litigation
Readiness and IM Strategy**
Diane Crouse,
*Department of Finance and Treasure
Board of Canada Secretariat*

**Developing an Effective Document and
Records Management System**
Denise Going,
DG Consulting

Web 2.0: The New IM Frontier
Alex Beraskow & Nick McKeown,
IT/Net Group Inc.

The Duty to Preserve E-Documents
Jennifer Dolman,
Osler, Hoskin & Harcourt LLP

**Implementing an Electronic Records
Management Program to Reduce
e-Discovery Costs and Risks**
Vigi Gurushanta,
IMERGE Consulting Inc.

**Electronic Information Storage:
Compliance, Retention & E-Discovery**
Constantine Karbaliotis,
Symantec (Canada) Corporation

Privacy Assessments and Audits
Michael Power,
Ontario Smart Systems for Health Agency

Privacy Update for Researchers
Anne Lavigne,
Ottawa General Hospital

**Meeting the Challenges of Consent
& Compliance**
Judy Farrell,
*London Health Sciences Centre and
St Joseph's Health Care London*

**Limits & Obligations on Commercial
Uses of Health Information**
Wendy Komar,
*London Health Sciences Centre/St. Joseph's
Health Care, London*

**Measuring Impact of E-Health Records
and Information Systems**
Linda Long,
Royal Victoria Hospital

Patient Privacy & Electronic Health Records
Michael Power,
Ontario Smart Systems for Health Agency

Governance of Data Privacy & Security
Peter Lambert,
St. Michael's Hospital

Ontario's Initiatives in Private Compliance
Dr. Ann Cavoukian,
Office of the Privacy Commissioner of Ontario

Third-Party Access & Disclosure
Erfa Alani,
IBM Business Consulting Services

Privacy Compliance Tools & Methodologies
Gene Norvaisa,
Ottawa General Hospital

Registration: To reserve your place, call Federated Press toll-free at 1-800-363-0722. In Toronto, call (416) 665-6868 or fax to (416) 665-7733. Then mail your payment along with the registration form. Places are limited. Your reservation will be confirmed before the course.

Location: Ottawa Marriott Hotel, 100 Kent street, Ottawa, Ontario, K1P 5R7

Conditions: Registration covers attendance for one person, the supplementary course material as described in this document, lunch on both days, morning coffee on both days and refreshments during all breaks. The proceedings of the course will be captured on audio or video. Multimedia proceedings with all slides and handouts can be purchased separately on a CD-ROM which will also include the course material.

Time: This course is a two-day event. Registration begins at 8:00 a.m. The morning sessions start promptly at 9:00. The second day ends at 4:00 p.m.

Cancellation: Please note that non-attendance at the course does not entitle the registrant to a refund. In the event that a registrant becomes unable to attend following the deadline for cancellation, a substitute attendee may be delegated. Please notify Federated Press of any changes as soon as possible. Federated Press assumes no liability for changes in program content or speakers. A full refund of the attendance fee will be provided upon cancellation in writing received prior to January 11, 2011. No refunds will be issued after this date. Please note that a 15% service charge will be held in case of a cancellation.

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TO REGISTER FOR ELECTRONIC DOCUMENTS AND RECORDS MANAGEMENT

Name _____

Title _____ Department _____

Approving Manager Name _____

Approving Manager Title _____

Organization _____

Address _____

City _____ Province _____ Postal Code _____

Telephone _____ Fax _____ e-mail _____

Please bill my credit card: ❑AMEX   ❑VISA   ❑Mastercard

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