

Electronic Records & Information Management

Hampton Inn & Suites Vancouver Downtown

September 28 – 29, 2009



Conference 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.

Improving records management

We are in a recession but we still need to improve our records management policies and procedures, to make the case for investing in new systems and to take a corporate approach to information and records management. Securing the necessary resources and budget is very challenging in the current climate so come and learn how to make a compelling business case for investment.

Getting help

This conference 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 July 31, 2009 and save — see registration form for details.

Who should attend this event?

- Records Managers
- Information Managers/Privacy Officers
- Archivists
- Freedom of Information Managers
- Compliance/Risk Managers
- Knowledge Managers
- Content Managers
- Risk Managers
- E-Records/IT/ & Computer Forensic Managers
- Business Process Analysts
- Privacy Officers
- Chief Information Officer

Day One

September 28, 2009

Register Today!

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

Fax: (416) 423-2638

www.acuityforums.ca

Necessity of Efficient Records Management in the Turbulent Post-Bailout World

This presentation will explore the turbulent environment and the regulatory, litigation, compliance, budgetary and technology challenges that companies can expect as a result. The session will also explore practical tips and solutions for addressing these challenges: from tips in developing business cases for records management during tight times to practical and efficient procedures for addressing new regulations and technologies.

In this session we will explore:

- Identify developments in the business and legal environment creating new challenges in the world of records and discovery management
- Recognize regulatory, litigation, economic and technology changes that will necessitate better and more efficient records management
- Share existing and new tips, tools, practices, strategies and technology that to address these developments and changes
- Understand and analyze financial constraints that may undermine your records management efforts
- Discuss and explore additional techniques for overcoming countervailing pressures

Records Management's Changing Role In Privacy, Security, and Authentication

In the 21st century, businesses of all sizes are facing privacy, security and authenticity issues as they try to protect and manage their vital records and information, and the stakes are higher than ever. If you're facing the challenges of managing information for a complex organization, you need to keep abreast of the cutting edge issues you face, and the solutions for managing them. In addition, this session will examine four of the most pressing issues facing information managers, and will explore solutions to help them navigate the regulatory and risk management maze that faces everyone.

Information Privacy – an overview of privacy law affecting data retention and employer and employee privacy concerns
E-Signatures and E-Commerce – examines e-signature and e-commerce law, and how it can affect the way you manage your records and business processes

Business Data on Personal and Home Computers – examines issues of business-owned data on employee-owned computers, and the current state of the law in this area.

Auditing for Compliance – examine techniques and tools for auditing a records and information management program in order to identify issues and encourage compliance.

Strategic Approaches to Record Management

How you store and manage documents and other electronic information in the first place can have a big impact on how much time and effort you will need to expend in recalling that information. With the explosion of corporate email, instant messages and text messages, how are corporations dealing with the need for e-storage space? As the amount of e-data continues to grow, more time will be required to search. What can your corporation do ahead of time to ensure the data is available and accessible?

In this session we will explore:

- Exploration of retention and purge policies and how to best implement them
- The impact of thorough information management on eDiscovery
- How to better other processes (i.e. records management, enterprise content management) in-house to more cost effectively manage eDiscovery
- Auditing and enforcing compliance in a systemized repeatable fashion
- Record retention requirements and issues with searching voice recording tapes and recorded conference calls
- Best practices for data retention and litigation hold policies

Role of Records Management in Litigation Preparedness

The role of the records management professional is indispensable in litigation preparedness and litigation response. In this session, will review the recent trends in ESI case law, the implications for your company, the steps you can take to ensure your company minimizes risk.

In this session we will explore:

- 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

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Implementing ECM: Gaining the Benefits While Avoiding the Headaches

This session will walk through a “best practices” approach to implementing ECM, incorporating both project management and records management principals; will review the menu of ECM technology options and highlight business applications where they fit; will discuss how information management standards remove risk from ECM implementations and will explain why it’s critical to have meaningful metadata to tie the content together across your organization’s assortment of ECM tools.

In this session we will explore:

- Building the business case for ECM
- How is ECM different? – How can this lead to failure?
- Business drivers
- Project approach
- Design solution
- Resources required

Function – Based Classification Scheme Design

In this environment of heightened sensitivity to accountability and information overload, an organization needs a full and accurate understanding of its business role, responsibilities and activities or, in other words, of its business “function”. This understanding of function is a necessary condition for every other dimension of running the business – for planning, conducting and evaluating activities; for establishing internal governance structures; and for managing resources, including information. Indeed, an understanding of business functions is a necessary condition for determining information resource requirements (identifying what information should be gathered and created); how information resources should be organized for business use; and what aspects of these resources should be kept, and for how long.

In this session we will explore:

- Gain an understanding of function-based analysis and classification
- Review and discuss how function-based analysis and classification are used to establish records retention and disposition specifications

Collaboration and Social Media: New Challenges for Records Management

Web 2.0 technologies such as wikis (e.g., Wikipedia) and social networking sites (e.g., Facebook) are challenging traditional IM concepts and processes. How do we recast the stages of the information lifecycle when clear lines can’t be drawn between creation and use? How are issues like ownership and copyright applied to folksonomies and mash-ups? This session discusses the many IM issues raised by Web 2.0, and looks at approaches for resolving them.

In this session we will explore:

- 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

Business Process Mapping for Information Management Professionals

In today’s evolving IM environment, IM organizations are being redesigned and IM business processes are being reviewed and revitalized. Business process mapping as a methodology and tool for examination with a view towards business transformation typically falls within the management consulting domain. However business process mapping is a business analysis skill from which all IM Professionals could derive benefit and will certainly expand the IM analysis “toolkit”. Skills learned in this

In this session we will explore:

- When to use process mapping as an analysis tool
- How to read and design a process map

Registration Form

Please write in BLOCK LETTERS

1st Delegate

Name: _____

Position: _____

Email: _____

2nd Delegate

Name: _____

Position: _____

Email: _____

3rd Delegate

Name: _____

Position: _____

Email: _____

Organization: _____

Address: _____

Province: _____ Postal Code: _____

Phone: _____ Fax: _____

Course Fees:

Early-Bird registrations expire July 31, 2009

- \$995.00 – for both days
- \$595.00 – for one day
- \$200.00 – per session

After the Early-Bird registrations expire

- \$1095.00 – for both days
- \$695.00 – for one day
- \$225.00 – per session

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 & Suites
Vancouver Downtown**

Payment Method:

Credit Card:

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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 7, 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 7, 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.