Software Introduction – OpenText GCDocs™

Instruction by Bruce Miller IGP, MBA

**Duration**
8 hours (1 day)

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RIMtech Public Online Courses are scheduled periodically and open to anyone. Attendance is limited to optimize the learning experience.

opentext™ OpenText GCDocs™ is a sophisticated, full-featured records management and governance solution that can apply recordkeeping compliance across several different systems such as SharePoint, file shares, and more. If you're considering this product, or if you already have it, this comprehensive "How to" treatment of the product will show you what you need to know about it to successfully deploy it. This course is not a hands-on product training experience, rather you'll learn the terms, concepts, principles, capabilities and limitations of the product. And this course will be enormously beneficial either *before* or *after* you've completed the vendor's hands-on product training. You'll learn the product's capabilities and limitations, how to use it effectively, and how to estimate realistic project time & effort estimates for product deployment. This course is designed and delivered by **Bruce Miller**, author, independent consultant, and leading expert in electronic recordkeeping, and author of "*Managing Records in SharePoint*". Bruce is vendor-neutral – he has no stake in any product. You therefore get truly independent analysis and objective assessment of the product's capabilities, along with his deep understanding of the competitive position of all products. After completing this course you'll be able to apply your new knowledge and insight to make product selection and/or deployment decisions. You'll fundamentally understand the product and learn what it really takes to deploy it in a real-life project.
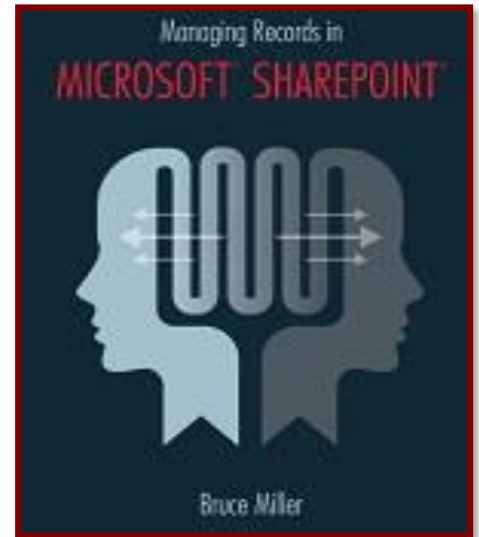
Learning Objectives

Upon completion of this course, participants will be able to:

- Understand the capabilities and limitations of the product
- Know what sources of records can be managed, costs and limitations of each.
- Assess the implication and costs of preservation copies.
- Learn how the product handles your retention schedule.
- How the product manages physical records
- Define and deploy sophisticated multi-phase retention rules
- Assess how close the product comes to US DoD 5015.2 requirements
- Understand how formal records disposition is carried out
- Learn how to price the product and project long-term total cost of ownership
- Discover how the product uses artificial intelligence to automate recordkeeping

Who Will Benefit

All project stakeholders will benefit from this workshop, including Records/Information Management professionals, IT managers and specialists, project managers, compliance officials, and senior management.

Takeaway Tools

Course materials include product assessments and detailed pricing models, as well as a reusable total cost of ownership projection model.

Certification Credits

IGP	14 (ARMAIGP2020_00066)	CRM	7 (2021020826807)

Testimonials

"*I loved the performance measure aspect, and 20 suggested decisions. This was worth the cost of the course alone.*"

"*I really liked the presenter. He engaged the attendees and asked thought-provoking questions that generated some lively conversations.*"

"*This was one of the most engaging and informative seminars I can remember attending. I got a lot of great takeaways and can enthusiastically tell my employer that this was a productive use of my time and training dollars.*"

"*Thank you! This course hit the nail on the head – it touched on many of the issues that I see in the workplace and provided me with the guidance and affirmation that will help me to manage these issues. Awesome seminar!*"

Instructor

Bruce Miller, MBA, IGP is a world leading expert on electronic recordkeeping. He is an independent consultant, an author, and an educator. Widely regarded as the inventor of modern electronic recordkeeping software, he pioneered the world's first commercial electronic recordkeeping software in 1989. In 1997 he achieved the world's first e-Records software certification against the US DoD 5015.2-STD standard, and has since presided over several successful software certifications. In 1999 he developed the world's first e-Records software *engine* for business software. That year he received ARMA Canada's National Capital Region's **Ted Ferrier Award of Excellence** for his contribution to the field of records management. Bruce's software was the first technology in the world to be certified against the revised 5015.2 June 2002 standard. In 2002 his company was acquired by IBM, where he served for three years as IBM's global e-Records Strategy and Business Development Executive. At IBM he was honored as a *Technical Leader*, one of only 439 out of 360,000 IBM employees. Mr. Miller is the recipient of the prestigious 2003 **Emmett Leahy Award**, considered the highest international recognition given to professionals in the field of information and records management. His book "*Managing Records in Microsoft SharePoint 2010*" was an ARMA best seller, and the second edition was released in October 2015. Bruce holds a Diploma in Electronics Engineering Technology, a Masters in Business Administration from Queen's University, and is a certified Information Governance Professional.

Course Topics

Topic	Description
System Architecture	Where the product stores records, how it applies records control to various systems.
Records Sources	What records sources (Content Management, file shares, email systems, ERP, etc.) are supported, and what level of records control is provided for each.
Records Control	How records control is applied to documents. When and how are documents managed as records, and the details of a declared record.
Preservation Copies	How preservation copies are deployed, managed, and dispositioned.
The Retention Schedule	How the retention schedule is entered, managed, and maintained over time
Retention Rules	How to define and deploy multi-stage, multi-part retention rules based on various date and event triggers
Physical Records Management	How physical records are structured, named, enumerated, labeled, stored, and managed. How they are related to their electronic counterparts by category.
Legal Holds	How legal holds are defined, deployed, and lifted. Limitations of holds. When to use a third party legal hold system.
US DoD 5015.2 Compliance	Learn how the product complies with the US government standard.
Records Search & Retrieval	How to effectively search for records across multiple records sources
Disposition	How the product assesses and qualifies records eligible for disposition. Understand approvals, reviews, and destruction certificates
Transfers	The transfer of records to a third party at the end of their lifecycle
Reporting	How to design and generate essential recordkeeping reports
Auditing	What events are audited, how/where to configure and retrieve the audit trails, how to report and present records audits.
Pricing/Licensing Model	Understand the vendor's particular pricing and licensing model. Learn to project initial and recurring costs.
Artificial Intelligence	See how automatic classification can be accomplished via machine learning. Understand the reality of training loads, classification accuracy, and the challenge of classifying case records.

Advantages of RIMtech Online Public Courses

- ✓ 100% vendor neutral content. No ties to products or services providers.
- ✓ Instruction by Bruce Miller. Learn from, and interact with, the top expert in electronic recordkeeping.
- ✓ Live instruction – not pre-recorded.
- ✓ Real-world examples and experience from actual projects.
- ✓ The very latest in technology, techniques, and methods.
- ✓ Engaging, dynamic, interactive instruction. Exercises to facilitate learning.
- ✓ You get to keep materials and tools following completion.
- ✓ CRM/IGP credits for most courses.
- ✓ Official Completion Certificate.

Registration Form (1 form per participant)		Class	SI O1U
Mr/Ms/Mrs.	Name	Title	
Organization		Dept.	
Address			
City	State/Prov	Zip/PostCode	Country
Telephone	Email		
Payment Method			
Please Bill Credit Card	☐ Visa	☐ Mastercard	☐ Amex
Name on Card			
Card Number		Expiry Date (YY/MM/DD)	CCV
Signature			
☐ Cheque, Payable to RIMtech Inc.	☐ Invoice, P.O. # (Attach P.O.)		

Five Ways to Register & Pay	
Online	Go to the appropriate class page under Training & Education. Select the class, then pay via PayPal or credit card
Telephone	Call Natalie Arruda at 343-572-8533 to give your credit card details over the phone.
Email	Complete this form and scan it to PDF, then email it to us at natalie@rimtechconsulting.com
Cheque	Complete this form and enclose a cheque. Mail to RIMtech Inc., 50 Argue Drive, Ottawa, On Canada K2E 6S1
Purchase Order	Complete this form, include Purchase Order, scan to PDF, then email to us at natalie@rimtechconsulting.com

Software Introduction – OpenText GCDocs™	Price	
	Regular	**ARMA Member**
	US $800	US $700
Applicable Taxes	Outside Canada	none
	AB, SK, BC, MB, NT, QC, NU, YT	5%
	ON	13%
	NB, NL, NS, PE	15%

Technology Requirements

1. Reliable, stable high-speed Internet connection
2. Computer/laptop with a hands-free microphone (headset, or built-in)
3. Zoom App available at https://zoom.us/download (downloads automatically upon first meeting sign-in)
4. Camera optional but recommended
5. Printer to print out course exercise materials (highly recommended)

Terms and Conditions

This is a summary only. See https://www.rimtechconsulting.com/terms-conditions for our detailed Terms and Conditions.

1. **Equipment Requirements**. Each participant is responsible for the technology requirements above in order to participate successfully in any RIMtech online class or event.
2. **Class Materials**. Participants will receive all class materials in electronic form. Materials will be posted to a restricted page of RIMtech's website for that particular class.
3. **No-Shows.** If a participant fails to attend a class without a notification of cancellation, no refund will be issued. RIMtech will make the class materials available for that participant.
4. **Payment.** Payment, or a Purchase Order, must be received by the class date. All invoices are due within 30 days.
5. **Participant Contact**. We require the name, email addresses, and telephone number of each participant prior to the start of each class.
6. **Participant Substitution**. A participant may be substituted at any time, by contacting natalie@rimtechconsulting.com.
7. **Participant Cancellation**. To cancel, you must notify us 5 days prior to the class date. The class fee will be refunded less a 10% administrative fee. If cancellation is received later than 5 days prior to class start date, participant may nominate a substitution, or RIMtech will issue a credit voucher for the full amount of the class, redeemable for 1 year against any class of equal or lesser value.
8. **RIMtech Cancellation**. RIMtech reserves the right to cancel any class for any reason, such as a failure to reach the minimum class registration size, instructor illness, etc. In such an event, RIMtech shall refund the full registration fee paid. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
9. **RIMtech Postponement**. RIMtech reserves the right to postpone/reschedule any class for any reason and will, in such an event, work with registrants to find a mutually acceptable reschedule date. If such a date is not acceptable to any registrant, a full refund will be issued. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
10. **Liability**. RIMtech assumes no liability for changes in course dates or content.
11. **Currency**. All fees are in US dollars.

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