

Online ECM Practitioner Training Course Outline

Learn strategies, tools and technologies to capture, store, manage, preserve and deliver content

Introduction

The AIIM Enterprise Content Management (ECM) Certificate Program is designed from global best practices among our 65,000 associate and professional members. The training program covers the strategies, tools and technologies to capture, store, manage, preserve and deliver information in support of business processes. It provides you with a framework which enables the management of information assets across an organization, and it ties in relevant components and technologies. This could be Imaging, Electronic Document Management, Electronic Records Management, Workflow, Web Content Management, Document Centric Collaboration, or Enterprise Search technologies.

AIIM is an industry association that provides education, research, and best practices to help organizations find, control, and optimize their information. For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire Enterprise Content Management industry - including users, suppliers, and the channel - acts as the industry's intermediary

Newly Revised and Updated

AIIM has just revised and updated the ECM Certificate Program based on changes in the industry with new content types, solutions, and best practices, but also incorporated comments made by the thousands of students that have taken the courses, online or in our classrooms. Students who have previously completed the ECM program should consider taking this newer version to enhance their skills and strengthen their learning from the previous course. In addition to updating their certificates and designations, attending the revised Practitioner program will bring benefit from the expanded focus on available solutions (e.g. SharePoint 2007); new content types (e.g. wikis and blogs); taxonomies and folksonomies; new preferred approaches (platforms/solutions); and new best practices and standards (e.g. PDF/A and MoREQ2).

Course Development

The course objectives and content is defined and reviewed by AIIM Education Advisory Groups in the US and Europe, representing AIIM's more than 65,000 associate and professional members. These Education Advisory Groups have the following members:

Accenture	Gambro
Albistur Consulting	Gartner
Barclays Capital	Gimmel Group
Bill and Vieve Gore School of Business, Westminster College	GlaxoSmithKline
BP	Harris Corporation
CCRM Associates	Hartman Communicatie
Chevron Phillips Chemical Company	Health First
CIA	Hewlett-Packard
Crown Partners	Hyland Software
Doculabs	IBM
Fujitsu	Inforesight Limited
	JPMorgan Chase



Kodak
Marion County Health Dept.
Objective Corporation
Oracle
Ordina
Ricoh
Royal Mail Group
Shell

SpringCM
Sunoco
The National Archives of United Kingdom
The South Financial Group
US Courts
US Department of Treasury
ZyLAB

The course materials were developed in partnership with Information Architected Inc based on requirements and best practices defined by the above companies.

Course Description

The ECM Practitioner Training course provides you with a thorough understanding of strategies, methods and tools for managing content. This includes technologies and global best practices for information architecture, scanning/imaging, metadata, taxonomies, content security, process management and automation, findability, delivery, and presentation.

The course has 11 modules, and each module is 45-90 minutes in length and combines audio and presentations delivered via your Web browser. You may start, pause or stop the module at any time to review materials at your own pace. You can also view a module multiple times to ensure mastery of content. Downloadable handout materials and additional links and resources accompany each module, and you have unlimited access to the modules for 6 months.

Course Objectives:

Practitioner Component: (What is ECM?)

- Business benefits of ECM
- ECM technologies such as document management, imaging, records management, workflow, web content management and collaboration
- Preferred approaches, platforms vs solutions, enterprise vs departmental
- Information architecture, interoperability, and integration
- Sources of information and appropriate capture and migration mechanisms
- Metadata and indexing
- Types of taxonomies and their value
- Ontologies and folksonomies
- Different levels of access control and security
- Process improvements and automation
- Search and retrieval technologies
- Different ways of delivering information and content to employees, partners and customers
- Existing and emerging trends such as Web 2.0, SaaS, and Open Source.

Course Designation

You will be awarded the AIIM ECM Practitioner (ECM^P) designation after passing the online exam. This is an AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM ECM Practitioner. You can use the associated logo and title on your business card,



email signature, web page, etc. The exam is available via the Internet – you have 6 months to pass the test after attending the training course. The designation is valid for 5 years.

Benefits of becoming ECM Practitioner (ECM^P):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for planning ECM
- Discover real world solutions and best practices for challenges you face
- Learn from experts in the field who are able to answer your questions, address your comments, and are willing to accept your feedback.

Who should attend AIIM's ECM Practitioner Course?

The ECM Practitioner Course provides a detailed coverage of Enterprise Content Management for people working in both in the public and private sector. Through attendance in this program, students will be able to consolidate their current position and standing, as well as prepare for future career development in a more senior role in the management and development of an organization's information management strategy.

The ECM Practitioner Course is designed for Business Managers, IT Managers, Compliance Officers, Risk Managers, Records Management Professionals, as well as for solution integrators and providers, sales consultants, project managers, and technical staff.

How will I learn at AIIM's ECM Practitioner Course?

The courses follow a proven learning model with engaging, impactful and live workshops with participative and challenging exercises. The elements of this methodology are:

- **3 Domains:** development should engage participants at three levels – emotionally (feeling – the heart); logically (thinking – the head) and practically (doing – the hand)
- **Transferability:** students should always be able to see how the skills that they are developing can be used back at their workplace
- **Memory:** the design of the event and the activities within it should be memorable
- **Measures:** participants (and their organizations) should be able to measure the impact of the intervention
- **5 Senses:** the activities within a development program should appeal to all 5 senses wherever possible, to stimulate a range of different responses
- **Reflective Dialogue:** activities are not effective unless there is a period of reflection built into a program, so that participants can reflect on their actions and plan how they would do things in future

Course Material

You will receive access to the online ECM Practitioner courses and exam for 6 months. This is also accompanied by course notes, reference handouts, and an abbreviated glossary.

Learning Objectives and Course Agenda

ECM Practitioner Module 1 - Introduction to ECM

Learning objectives

At the end of this session, you should understand:

- The state of content in the enterprise



- Differences in data, information, content and records, and the supporting systems
- Definition of ECM
- The ways that ECM can be applied to business drivers
- Understanding and quantifying the business value of content

Module Agenda

- The (enterprise) content mess
- Defining data, information, content, records
- What is ECM?
- Why use ECM?
- Business value of content
- Technology of ECM

ECM Practitioner Module 2 - Technologies and Functionality

Learning objectives

At the end of this session, you should understand:

- Key ECM technologies
 - Document Management
 - Electronic Records Management
 - Workflow
 - Imaging
 - Collaboration
 - Web Content Management
 - Content Security
 - Search and Browsing
- Specialized instances of ECM
 - Business intelligence
 - Business process management
 - Digital asset management
 - Email management
 - Portals
- Effective practices for implementing ECM including avoiding solution silos and taking strategic view

Module Agenda

- Key technologies and functionality of ECM
- Specialised instances of ECM

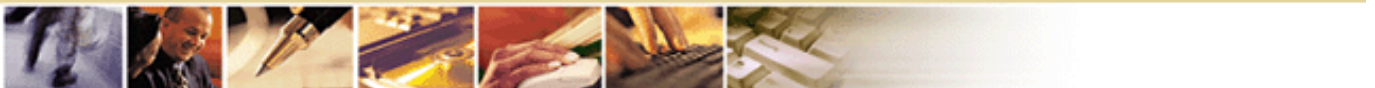
ECM Practitioner Module 3 – Information Architecture

Learning objectives

At the end of this session, you should understand:

- The importance and depth of planning needed for ECM
 - An Information Architecture is always required
- How to balance what you have with what you need
- Information architects help in the pre-planning, deployment, and post-maintenance
- 4 key conceptual components of any ECM-related system

Module Agenda



- Defining and positioning information architecture (IA)
- Role of ECM in an IA
- Conceptual components of ECM

ECM Practitioner Module 4 - Capture

Learning objectives

At the end of this session, you should understand:

- Different sources and content types
- How to develop a strategy for content capture
- The three basic stages of capture
 - Simple capture
 - Conversion
 - Migration
- Best practices to capture

Module Agenda

- On-ramps of content
- Strategy
- Stages of capture
- Best practices for capture

ECM Practitioner Module 5 - Metadata

Learning objectives

At the end of this session, you should understand:

- Metadata concepts
- The business drivers behind metadata
- How to design a metadata schema
- Manual vs. automated approaches to creation and collection
- Role of Standards

Module Agenda

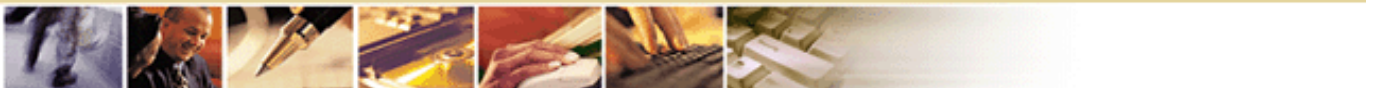
- Defining metadata concepts
- Business values of metadata
- Challenges of metadata
 - Creation and collection
 - Schema design
- Role of Standards

ECM Practitioner Module 6 - Taxonomy

Learning objectives

At the end of this session, you should understand:

- How to leverage classification in general and taxonomies in particular as part of an ECM strategy
- Different approaches to subject-based organization schemes:
 - Taxonomies
 - Thesauri



- Semantic networks
 - Ontologies
 - Folksonomies
 - Managing classification challenges
- Module Agenda
- Defining taxonomies and classification
 - Subject-based classification
 - Taxonomies
 - Folksonomies
 - Ontologies
 - Thesaurus and Semantic networks
 - Business case for classification
 - Standards and guidelines
 - Classification challenges

ECM Practitioner Module 7 – Security and Control

Learning objectives

At the end of this session, you should understand:

- Why security is important for ECM
- Concepts of controlling access to ECM solutions
- Layers of control and possible approaches to improve controls and security in ECM environment

Module Agenda

- Collaboration vs Control
- ECM and Compliance
- Technology/Functionality

ECM Practitioner Module 8 – Process and Automation

Learning objectives

At the end of this session, you should understand:

- The differences between routing, workflow and BPM
- The differences between transaction, content-based and ad-hoc processes
- The benefits, values and challenges in automating business processes
- How to leverage flowcharting and modeling
- The options for user interfaces to design or participate in automated processes

Module Agenda

- Basic concepts and constructs
- Benefits and challenges
- Methods and tools
- The user interface

ECM Practitioner Module 9 - Findability

Learning objectives

At the end of this session, you should understand:

- Why Findability is a critical component to an ECM strategy



- How Findability is comprised of multiple technologies and techniques
- The wide variety of interfaces available
- Present challenges and enhancements to security

Module Agenda

- Defining findability
- Search overview
- Basic search techniques
- Presentation and interfaces
- Findability and security

ECM Practitioner Module 10 – Delivery and Presentation

Learning objectives

At the end of this session, you should understand:

- The power of separating content from presentation
- The strategy that spans from content capture to presentation
- The strategy and orchestration of a variety of tools, techniques and methodologies

Module Agenda

- The value of information delivery
- Basic techniques and concepts
- Content tools and challenges
- Presentation tools and opportunities

ECM Practitioner Module 11 – Trends and Directions

Learning objectives

At the end of this session, you should understand:

- How to differentiate deployment alternatives for ECM
- How to position ECM suites and platforms into your strategy
- How to leverage ECM beyond text and images to include “rich media”
- How to meet rising user expectations for ECM-type interfaces and interactions
- The “content abundant” state of the market implores organisations to seek out new business opportunities through the redeployment of existing content

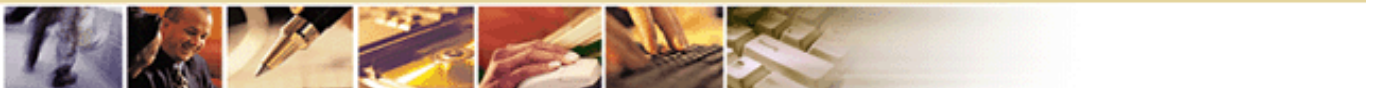
Module Agenda

- Alternative deployment models
- Integrated suites and platforms
- Content 2.0
- User expectations
- New business models

Please note that this AIIM ECM Certificate Program is designed to give all participants an appreciation of global best practices of ECM. You should not expect to gain in-depth expertise in all aspect of ECM from this Program. If you need in-depth expertise you should refer to specialist courses, references or expert assistance.

Feedback

Below is feedback from previous and existing course attendees;



- “AIIM’s training programs are essential to anyone in Information Management. Without up to date training, systems and programs are set up -- but may be at risk, in the long run, if developed by the under trained. The Information Management Industry as a whole is developing at the speed of light, so even someone like myself (a 23 year veteran) needs to refresh their training and stay on top of technology and advancement in trends to understand how to apply it. AIIM’s training programs provide this education.” TK Train, CRM, ECMp, MBA, Document Control Manager, Gambro
- “Enterprise records management or content management projects are comprised of cross functional teams with various backgrounds and specialties. It is important to the success of such projects that interdisciplinary teams develop a common lexicon and understanding of key concepts as fast as possible to enable collaboration. AIIMs educational curricula serve this need quickly and excellently”, Jayne Bellyk, RIM Program Manager, Chevron Phillips Chemical Company LP
- “Kodak clearly understands the value of the AIIM ECM courses. Our sales team uses this knowledge often as we support our document imaging resellers in their sales processes.” Todd LeVeque ECMp CDIA+, Director - US Channel Sales, Document Imaging - Graphic Communications Group, Eastman Kodak Company
- "The AIIM ECM training course provides an extremely comprehensive platform related to the enterprise content management industry and the technologies that support and drive it. The materials are thorough, up-to-date and well presented. I would recommend the course to both vendors and customers of ECM solutions." John Opdycke, Vice President of Marketing, Hyland Software
- "Fujitsu chose the AIIM ECM Certificate Training Program to empower our partners with the tools and strategies to help companies world-wide achieve successful ECM implementations." Pamela Doyle, Director, Fujitsu Imaging Products Group

Go to www.aiim.org.uk/education to learn of public courses being held in your area and their dates, and please contact training@aiim.eu if you have any questions.

Contact askjekkeland@aiim.org if you are interested in becoming an AIIM Training Partner. You can then sell and deliver AIIM Training Programs leading to AIIM designations.

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