

6TH Annual Event

Electronic Records & Information Management

**Practical Solutions for Modern Challenges
in Managing Electronic Information**

Conference: September 23 and 24, 2008 • Workshops: September 22, 2008
TORONTO, ONTARIO

**GET EXPERT ADVICE AND
INNOVATIVE PRACTICES FROM**

City of Toronto

GlaxoSmithKline

Bell Canada

Ontario Securities Commission

CGI

The Information Management
Specialists

IMERGE Consulting Inc.

RIMTech Inc.

shredEX Document Management

Regional Municipality of Niagara

PRESENTED BY:

INFONEX
Profit from Knowledge

**Strengthen Your Record Management Practices,
Meet the Challenges of New Information Formats, and
Maintain Compliant Records Management Systems**

- ✓ Learn how to manage the exchange of information through Web 2.0 applications such as blogs, wikis, Facebook, YouTube, and MySpace
- ✓ Understand the role of IT in your enterprise content management (ECM) solution
- ✓ Perfect your document lifecycle with records retention and disposal policies
- ✓ Ensure your organization is ready for e-discovery: understand Canada's Sedona Principles and the impact of the standardized guideline
- ✓ Learn disaster recovery techniques: ensure critical data recovery to minimize business losses
- ✓ Understand the impact of evolving privacy obligations and how they affect your records information management (RIM) system
- ✓ Facilitate change management by securing upper management buy-in
- ✓ Get insight on implementing an effective enterprise-wide electronic records management (ERM) structure
- ✓ Identify a software solution for your organization's archiving needs
- ✓ Understand the importance of e-mail management and how to implement proper guidelines for capturing, storing, retrieving, and permanently deleting e-mail data

PRESENTED IN
ASSOCIATION WITH:

 **aiim**
First Canadian
Chapter

AND

 **ARMA**
INTERNATIONAL®

Register Today! Call 1.800.474.4829 Fax 1.800.558.6520 WWW.INFONEX.CA

Electronic Records and Information Management

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YOUR INVITATION TO ATTEND

INFONEX

Profit from Knowledge

67 Richmond Street West, 7th Floor, Toronto, Ontario M5H 1Z5
Telephone: 1.800.474.4829 Fax: 1.800.558.6520 www.infonex.ca

Dear Colleague,

As a records manager, you face challenges that have intensified, as the transition from paper to electronic-based records has introduced new risks, vulnerabilities, and greater demands for data protection and security. The days of paper records will soon be past: the electronic office is becoming the only way to keep up. Tracking, storing, retrieving, and disposing of electronic information demands more rigorous standards and assurances, and with the recent rise of Web 2.0 technologies you must improve your policies and procedures to achieve systematic control of the flow of information.

INFONEX has responded to your requests for up-to-the-minute information and practical solutions for electronic records management with our 6th annual *Electronic Records and Information Management* conference. No matter what stage your organization is at in records information management (RIM) development, you will benefit from the knowledge and insight our experts will share at this conference!

Join our experienced faculty of speakers for two days of solid expertise, analysis, and lessons learned from specific projects and programs. Develop an action plan for integrating records management into your business modules. Get best practices for managing the flow of electronic information and learn how to enforce policies for capturing, retaining, and disposing of electronic data. Hear a special panel discussion on best practices for implementing your electronic document management solution, as well as two exclusive case studies from organizations that are currently implementing or have implemented an effective electronic records solution.

Attend *Electronic Records and Information Management* and benchmark your electronic records management (ERM) solution against some of the best in the industry! Register today!

Sincerely,



Christopher Graham
Vice-President, Conferences
INFONEX Inc.

P.S. Don't miss our pre-conference workshop, an interactive look at the foundations of records and information management.

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OPTIONAL WORKSHOP: MONDAY, SEPTEMBER 22, 2008 (1:00 – 4:00)

Document Management: The Foundation of Your Records Management Solution

Janet De Guzman, Senior Consultant, CGI

- Electronic document management (EDM) and electronic records management (ERM) systems
 - what do they do?
 - how do they work together?
- What your organization should do before implementing EDM and ERM systems: a readiness checklist
 - governance
 - policies and business rules; roles and responsibilities
 - education and awareness

Day 1

PROGRAM AGENDA: TUESDAY, SEPTEMBER 23, 2008

8:00 – 9:00 Registration and Continental Breakfast

9:00 – 9:10

Welcome and Opening Remarks from the Chair
Peter Shewchenko, Senior Project Manager, City Clerk's Office, Records and Information Management, City of Toronto

9:10 – 10:10

Records Retention Bylaws, Schedules, and e-Records Crossover

Else Khoury, Manager, Corporate Records and Archives Services, Regional Municipality of Niagara

Rob Gerrie, Records Management Coordinator, Traditional Media, Regional Municipality of Niagara

Heather McCafferty-Leger, Records Management Coordinator, Electronic Media, Regional Municipality of Niagara

- Overview of Niagara Region's corporate records management system
- Recent efforts to establish a protocol for e-records
- How the Regional Municipality of Niagara is overcoming challenges

CASE STUDY

10:10 – 10:30

Networking Break



10:30 – 11:30

Implementing Your Electronic Records Management Solution

Bruce Miller, President, RIMTech Inc.

- Understanding and overcoming the barriers to successful electronic recordkeeping
- Managing the project: defining specific goals, tasks, and measurable outcomes
- Methodology for implementing electronic records software technology

11:30 – 12:30

E-mail Deployment: How GlaxoSmithKline Reduced Its E-mail Holdings by 68% with Employee Compliance of 99%

David Rintoul, Senior Records Management Specialist, GlaxoSmithKline

- Project planning
- Communication strategies
- Training and coaching

CASE STUDY

- Project management
- Lessons and success factors

12:30 – 1:45

Luncheon

1:45 – 2:45

Best Practices for Implementing Your Electronic Document Management (EDM) Solution

Vigi Gurushanta, Principal, IMERGE Consulting Inc.

- Getting your entire organization on board
- Solutions to common problems for both small and large companies
- Understanding the benefits and the pitfalls: learning what to avoid

2:45 – 3:00

Networking Break



3:00 – 4:00

Overcoming the Challenges of New Forms of Communication and Devices

Paul Fisher, Consultant, Portals and Content Management, IBM Canada

- Dealing with the challenges of the "virtual workplace"
- Managing information sharing through remote access devices and satellite networks: BlackBerries, PDAs, laptops, VoIP, and text messaging
- Implementing policies and procedures to control the information flow through blogs, instant messaging, social networking, and Web 2.0 applications such as wikis, Facebook, YouTube, and MySpace
- Implementing effective policies to manage new information media
- How to capture, store, access, and permanently delete electronic data

4:00 – 5:00

Impact of Emerging and Evolving Privacy Obligations on Your Organization's Information Management Practices

Christopher Berzins, Senior Counsel, General Counsel's Office, Ontario Securities Commission

- Are you creating unnecessary privacy vulnerabilities by collecting and keeping more information than you need?
- New risks that arise when information is shared in electronic format
- Public access to records: should the extent of access be rethought when that information becomes available in electronic format?

5:00

End of Day One

Register Today! Call 1.800.474.4829

Fax 1.800.558.6520

WWW.INFONEX.CA

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Day 2

PROGRAM AGENDA: WEDNESDAY, SEPTEMBER 24, 2008

8:00 – 9:00 Continental Breakfast

9:00 – 9:10

Opening Remarks from the Chair

Peter Shewchenko, Senior Project Manager, City Clerk's Office, Records and Information Management, City of Toronto

9:10 – 10:10

Change Management: Adapting Your Organization to Your Record Management Solution

Vigi Gurushanta, Principal, IMERGE Consulting Inc.

- Developing an action plan and business case
- Communicating to senior management the importance of records management
- Educating and creating training programs for record management process
- Integrating records management into your business modules

10:10 – 10:30

Networking Break



10:30 – 11:30

How to Ensure Your Organization Is Ready for E-Discovery

Christine Ardern, Principal Consultant, The Information Management Specialists

- Understanding the Canadian Sedona Principles: impact of the standardized guideline
- Understanding your legal responsibilities for your organization's records and avoiding penalties for noncompliance with recordkeeping regulations
- Creating processes in conjunction with regulations: ensuring your policies and procedures meet new requirements

11:30 – 12:30

Role of Technology in Successfully Implementing Enterprise Content Management (ECM) Solutions

Stephen R. Donahoe, Executive Consultant, CGI

- Enterprise content management (ECM) defined
- How to close the gap between IT and records management departments
- Creating a synergistic project team
- Roles and responsibilities
- Defining business and technical requirements
- How to measure a successful implementation

12:30 – 1:45

Luncheon

1:45 – 2:45

Disaster Recovery Planning and Prevention: Strategies to Avoid Losing Important Records

John Estrada, Director, shredEX Document Management

- Corporate disaster recovery planning policies and why you need one: developing cost-effective contingency plans to recover critical data
- Developing standards and controls and enforcing compliance
- Backing up your electronic documents in case of disaster

2:45 – 3:00

Networking Break



3:00 – 4:00

Perfecting Your Document Lifecycle: Document Retention and Destruction

Dominic Jaar, Legal Counsel, Bell Canada

- Importance of a retention and disposition policy; how it will protect your organization
- Document appraisal: what to keep and what not to keep
- Best practices
- Communicating and enforcing records holding policies

4:00

End of Day Two

WHO SHOULD ATTEND THIS EVENT

INFONEX Records Management events attract records management and legal professionals from both the public and private sectors, some of the individuals you will meet include:

- | | |
|---|------------------------------------|
| • Corporate Records Managers and Archivists | • Internal Auditors |
| • Corporate Counsel and Corporate Secretaries | • Risk Managers |
| • Vice-Presidents of Finance, CFOs, and Controllers | • Content Architects |
| • Chief Administrative Officers | • Knowledge Managers and Analysts |
| • Vice-Presidents of Corporate Services | • Electronic Resources Specialists |
| | • IT Technicians |

SPONSORSHIP AND EXHIBITION OPPORTUNITIES

If you would like to increase your visibility with senior records management and IT professionals, you need to be at the *Electronic Records and Information Management* conference. A limited number of sponsorship options are available. For more information, contact our sponsorship department at 416.971.4177, ext. 244, or by e-mail at sponsorship@infonex.ca.

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LOCATION: *Electronic Records and Information Management* will be held at a convenient location in Toronto, Ontario. Detailed venue information will be provided with your registration confirmation.

YOUR REGISTRATION INCLUDES: Registration fees include all course materials, continental breakfast, lunch, and refreshments. **Parking and accommodation are not included.**

GROUP DISCOUNT — SEND YOUR TEAM! 4th Person Attends Free! If 3 individuals from one organization register at the same time, a 4th person may also be registered to attend free of charge. The free registration must be of equal or lesser value than the paid registrations. All discounts will be applied against the full conference fee. You cannot combine multiple discounts — only one discount can be used per registration.

MAILING LIST UPDATE/REMOVAL: To add, update or remove your information from the Infonex mailing list, please call 1-800-474-4829, and select Option 3, or complete the online form at www.infonex.ca. Please note: Infonex prepares mailings several weeks in advance; it may take such time for the updates to come into effect.

THREE KEY BENEFITS OF ATTENDING THIS EVENT

- 1) Compare your electronic records management progress with that of peers and industry leaders
- 2) Find out how to gain buy-in from the rest of your company
- 3) Learn to manage new forms of communication
- 4) Develop and implement records retention and disposal schedules

REGISTER BY PHONE, ON-LINE, OR IN THESE 3 EASY STEPS!

1 PRINT YOUR NAME AND CONTACT INFORMATION

Yes! Register me for *Electronic Records and Information Management*

Mr./Ms./Mrs. _____ Title _____

Organization _____

Name of Approving Manager _____ Title _____

Address _____

City _____ Province _____ Postal Code _____

Telephone () _____ Ext _____ Fax () _____

E-mail address _____

Send me information by E-mail Postal Mail Fax

Company's main line of business _____ Number of Employees at site: _____

2 SELECT YOUR OPTION(S) AND METHOD OF PAYMENT

4th Delegate Attends FREE!

REGISTRATION FEES:	Register and pay by JULY 25	Register and pay by AUGUST 22	FULL PRICE
Conference Only	\$1,799 + GST	\$1,999 + GST	\$2,199 + GST
Conference and Workshop	\$2,249 + GST	\$2,499 + GST	\$2,749 + GST

SELECT YOUR OPTION(S): Conference Optional Half-Day Workshop

Please charge to my VISA MC AMEX Cheque enclosed, payable to INFONEX

Card Number: _____ Exp. Date: _____ / _____


Signature: _____

Please check box if you are GST exempt

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3 SEND US YOUR REGISTRATION

 **FAX:** 1.800.558.6520

 **E-MAIL:** register@infonex.ca

 **TELEPHONE:** 1.800.474.4829

 **WEBSITE:** www.infonex.ca

 **MAIL:** INFONEX INC.
67 Richmond St. W., 7th Floor
Toronto, Ontario M5H 1Z5

CANCELLATION POLICY:

Substitutions may be made at any time. If you are unable to attend, please make cancellations in writing and fax to 1-800-558-6520 **no later than September 9, 2008**. A credit voucher will be issued to you for the full amount, redeemable against any other INFONEX course and which is valid for twelve months (one year) from the date of issue. If you prefer, you may request a refund of fees paid, less a 15% administration fee. Registrants who cancel after **September 9, 2008**, will not be eligible to receive any credits or refunds and are liable for the entire registration fee.

Confirmed registrants who do not cancel **by September 9, 2008** and fail to attend will be liable for the entire registration fee.