



# SharePoint for Information Managers

## Assessment of its document and records management capabilities

A programme led by SharePoint and Records Management experts

### 17 September 2010

Intellect, Russell Square House, 10-12 Russell Square, London WC1B 5EE



### Introduction

SharePoint 2007 is being widely adopted as the user platform of choice for organisations. It has established itself as the corporate information vehicle for a wide range of desktop user services including collaboration, web publishing and information sharing.

SharePoint 2007 included records management capability for the first time. Organisations are now beginning to adopt these features to provide their corporate EDRM solution. Microsoft has developed this capability further in SharePoint 2010.

Developing a solid and sustainable ERM capability within SharePoint requires careful planning, design and implementation

#### MOSS ENTERPRISE

Excel services  
InfoPath services  
Business intelligence  
KPI lists  
Document centre

#### MOSS STANDARD

Enterprise search  
CMS  
Advanced workflow  
My site

#### WSS

Basic workflow, lists,  
Content types, blogs, apps  
Emails to libraries, microsites

▲ MOSS suite functionalities of the core product

### Workshop Focus

This workshop has been developed to assist IT, Corporate Information Managers, Records Managers and Information Architects in supporting successful delivery of a SharePoint EDRM solution.

### Workshop Outline

- ① Introduces the basic concepts of records management based on records management standard ISO 15489.
- ② Introduces an overview of the basic records management components: classification, file plan structures, disposition schedules, metadata with examples of file plan structures.
- ③ Examines the document and records management features of SharePoint.
- ④ Explores the new features of SharePoint 2010 and Identifies how these overcome limitations in SharePoint 2007.
- ⑤ Considers strategies for integrating SharePoint and Electronic Document and Records Management Systems.

SharePoint is a trademark of Microsoft Corporation





# Looking forward to the features of Microsoft SharePoint Server 2010

## Leaders

The workshop will be delivered by Richard Jeffrey-Cook and Richard Kiernan.

### Richard Jeffrey-Cook

Richard is a certified Chartered IT Professional (CITP) and leads In-Form Consult's Consultancy Services. Richard has over twenty years experience as a project manager responsible for the delivery of complex information management projects in both the public and private sector. Clients include: Honda of the UK Manufacturing, Metropolitan Police, EON.UK, Highways Agency, Aberdeenshire County Council and Norwich Union.

### Richard Kiernan

Richard is a leading SharePoint architect and developer with in-depth knowledge of the SharePoint platform. He has worked with many clients in both the public and private sector.

## Objectives

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- ② Introduces an overview of the basic records management components: classification, file plan structures, disposition schedules, metadata with examples of file plan structures.
- ③ Examines the document and records management features of SharePoint.
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## Client Feedback

### Science Museum

"Very useful course knowledgeable presenters"

### BBC

"Very good. Nothing felt over extended or rushed"

### Security Industry Association

"Excellent overview of limitations of SharePoint"

### HBOS

"Capabilities of SharePoint and knowledge of the presenters"

### Barts and The London NHS Trust

"RM capabilities of SharePoint & practical discussion about system, useful to know restrictions of SharePoint. Useful overview & introduction to SharePoint. Helpful points on benefits and restrictions of SharePoint"

### Houses of Parliament

"Excellent introduction to "RM Functionality" in SharePoint"

## Workshop Booking

**Fee £250 plus VAT**

For further information and booking enquiries contact:

**James King**  
01923 283 694  
training@inform-consult.com  
www.inform-consult.com

West Clayton, Berry Lane, Chorleywood, WD3 5EX

# Booking Form



## SharePoint for Information Managers

Assessment of its document and record management capabilities  
Intellect, Russell Square House, 10-12 Russell Square, London WC1B 5EE

I would like to book place(s) for the SharePoint for Information Manager workshop. 3 easy ways to register for the workshop:

- Post:** James King, In-Form Consult, West Clayton, Berry Lane, Chorleywood WD3 5EX
- E-mail:** training@inform-consult.com
- Fax:** +44 (0)1923 286361

**17 September 2010 London**

Please complete in **BLOCK CAPITALS**

Organisation: .....

Address: .....

..... Postcode: .....

Nature of business: ..... No. of employees: .....

Which EDRMS/ECM Systems are you currently using: .....

What would you like to achieve from the workshop: .....

.....

.....

**Attendee(s) Details:**

Title	Name	Job Title	Tel No	Email

Please state if you require any special dietary needs: .....

Special requirements: (e.g. due to hearing or visual impairment, wheelchair access) .....

**Workshop Fees:** are £250 of each delegate exclusive of VAT. Group discounts may be applicable, please contact us.

**Payment Method:** please tick appropriate box

- Cheque** made payable to In-Form Consult Ltd
- BACS** bank details will be forwarded upon receipt of this form
- Credit Card\*** contact Sue Allen (training@inform-consult.com) or call +44 (0)1923 283694

IFC will invoice on receipt of Booking Form - payment confirms place(s) on the workshop.

**Joining Instructions and programme details will be sent out one week before the event.**

### Substitutions

You may substitute the named delegate with another attendee at any time without additional charge

### Cancellations

If you cancel your booking at least 10 working days before the workshop, we will offer a full refund. Alternatively, you may transfer your booking to the next available workshop at no additional charge.

If you cancel your booking between 5 and 10 working days before the workshop, we will offer a 50% refund. Alternatively, you may transfer your booking to the next available workshop at no additional charge.

We cannot refund cancellations made less than 5 days before the workshop. We will, however, offer to transfer your booking to the next available event at £25 additional charge.

\* 3% surcharge will be applied

### Data Privacy Statement

Please note by registering your contact details information including email will be used by In-Form Consult to communicate with you regarding the workshop. In-Form Consult may arrange relevant products and services.  PLEASE tick here if you DO NOT wish to receive information.