

## Schedule of Events

**9:30 a.m. – 3:00 p.m. CDT**

- “Doors” OPEN! Visit exhibitors, attend sessions, and chat live on Aug. 29.

**10:00 a.m. – 10:45 a.m. CDT**

- [Setting Up Survival Tricks for Managing Shared Drives](#)

**10:45 a.m. – 11:15 a.m. CDT**

- Visit the virtual exhibit hall—displaying top industry solutions and resources!

**11:15 a.m. – 12:00 p.m. CDT**

- [Preparing for a Transparent Vital Records Project Plan for IG Professionals](#)

**12:00 p.m. – 12:30 p.m. CDT**

- Visit the virtual exhibit hall—displaying top industry solutions and resources!

**12:30 p.m. – 1:15 p.m. CDT**

- [Building an Offsite Record Request System in SharePoint – The Building Blocks](#)

**1:15 p.m. – 1:45 p.m. CDT**

- Visit the virtual exhibit hall—displaying top industry solutions and resources!

**1:45 p.m. – 2:30 p.m. CDT**

- [Originating the Role of Information Governance Officer](#)

**2:30 p.m. – 3:00 p.m. CDT**

- Visit the virtual exhibit hall and network with colleagues one last time!

## Setting Up Survival Tricks for Managing Shared Drives

Wish your organization would fund and enforce the use of a records management tool? Did you LOL? It's survival of the fittest. Before we can explore practical ways to manage records on shared drives, we must first learn how to set up SharePoint lists. This online pre-session introduces you to the basics of setting up, using, and becoming familiar with SharePoint lists and serves as a foundation to the face-to-face workshop titled, "Implementing Survival Tricks for Managing Shared Drives."

**Upon completing this flipped pre-session, you will be able to:**

1. Create SharePoint lists and views
2. Add formulas to SharePoint lists
3. Describe how to leverage SharePoint lists in your job

**Skill Level:** Core, Management

**Education Thread:** Retention & Disposition

**Facilitated by:**

Soo E. Kim; Records Information Manager, Cadence Group

Tina Teree Baker; President, Cadence Group

*The follow-up, in-person workshop takes place at the [ARMA Live! 2017 Conference](#) in Orlando on Tuesday, October 17 – conference registration required.*

## **Preparing for a Transparent Vital Records Project Plan for IG Professionals**

Considering today's cyber threat landscape, the need to protect vital records – those records needed before, during, or after a crisis – is of extreme importance. Protecting this information may mean the difference between the continuation of the business, or the inability to recover after the loss. This online pre-session introduces you to the vital records project plan template to help you gather thoughts and ideas about the project before you begin. Each section provides thought provoking questions to help you build the project plan.

### **Upon completing this flipped pre-session, you will be able to:**

1. Summarize why a project plan is needed
2. Complete a project plan template
3. Assemble resource information
4. Describe the difference between completion dates and estimating ranges

**Skill Level:** Management, Strategic

**Education Thread:** Integrity & Transparency

### **Facilitated by:**

Amy Van Artsdalen; Records Management Specialist, Joe Hill Consulting Engineers

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## **Building an Offsite Record Request System in SharePoint – The Building Blocks**

The webinar component of the "Build an Offsite Records Request System in SharePoint" flipped session provides an in-depth review of the out-of-the-box Microsoft components required to build the solution. Specifically, you will receive a detailed review of InfoPath forms, SharePoint lists, and SharePoint workflow, as well as an overview of writing Visual Basic code to enable advanced functionality on an InfoPath form. You will see annotated sample code with a narrative description of how the code works.

### **Upon completing this flipped pre-session, you will be able to:**

1. Identify the components of a SharePoint 2013/SharePoint Online solution, including lists, libraries, workflow, and InfoPath forms
2. Describe how to build custom lists and form libraries within SharePoint 2013/SharePoint Online
3. Explain the different actions and conditions available in SharePoint 2013 workflow to build complex solutions
4. Design a plan to build an InfoPath form to submit requests for offsite storage utilizing various components of InfoPath, including Visual Basic scripting to manipulate XML
5. Describe how an InfoPath form allows users to easily add information to a SharePoint site, and to create workflow to route documents for review and approval via email

**Skill Level:** Management, Strategic

**Education Thread:** Availability & Protection

### **Facilitated by:**

Jeff Pierantozzi; Vice-President, TrailBlazer Consulting, LLC

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## Originating the Role of Information Governance Officer

What is an information governance officer (IGO)? Join this flipped online session to define the role and learn how to set the strategy, organize the work, collaborate with others, identify stakeholders, and begin to accomplish your business objectives. Using a new IGO's experience originating this role in a UK-based company, you will be able to create your own plan for success, considering geographic and international differences in IG program drivers. You will receive a sample IGO job description and work through a blank template to organize your IG priorities in preparation for the flipped follow-up session.

### **Upon completing this flipped pre-session, you will be able to:**

1. Identify important skills and traits for success as an information governance officer
2. Define a model for organizing information governance work, including information management
3. Complete an IG program planning template unique to your organization
4. Describe at least five differences or similarities between information governance priorities in the US, EU, and UK

**Skill Level:** Strategic

**Education Thread:** Accountability & Compliance

### **Facilitated by:**

Melissa Suek, IGP; Manager, PwC

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