# MUNICIPAL INFORMATION MANAGEMENT TRENDS

Company Profile

Company Experience

Municipal Experience

Records Management Trends

The Foundation

What you need to know

Questions

# About The InfoPros....

The InfoPros was established in 1988. We are a strategic information management consulting firm that specializes in the planning, development and implementation of information management programs, governance and technologies.
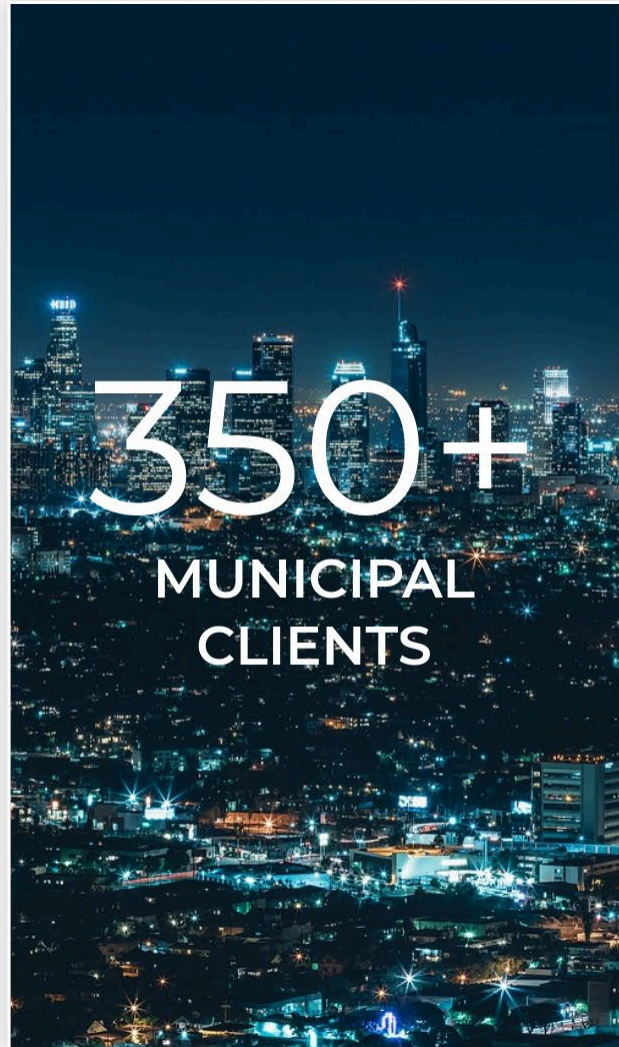
# 400+

**COMPLETED INFORMATION MANAGEMENT PROJECTS**

# 30
## Years

**INDUSTRY EXPERIENCE**

# 350+
## MUNICIPAL CLIENTS

# Nina Carter



- 30 yrs. Experience Records and Information Management, Data Governance Strategy and Planning

- First EDRM Solution Deployment – Foremost – Sudbury Hydro – (1993)

- MS SharePoint Information Architect since 2005

- Private Sector Customers throughout North America

- Federal, Provincial and Municipal Government

# INFOPROS STRATEGIC CONSULTING SERVICES

## IM Audit

Assessment Current IM Practices. IM Program Definition.

## Governance

Bylaws, Policies, Procedures, Technology Use and Guidelines, Change Management.

## Training

Records and Information Management, TOMRMS, M365, SharePoint, Data Governance.

## Strategic Planning

Content cleanup, MS Purview Planning, AI Preparation, File Plan Preparation, SharePoint Information Architecture, RFP Planning.

## Legislation Interpretation

Annual Legislative Updates, MFIPPA Application, Privacy Impact Assessment.

# INFORMATION MANAGEMENT TRENDS

- Laserfiche
- FileHold
- M365 (SharePoint Online)
- OpenText

# IM CHALLENGES

- Focus is on the technology to solve IM challenges
- IM Awareness and Education
- Governance (Bylaws, Policies, Procedures)
- Information Management
- MFIPPA
- Email Management
- M365 (Teams, OneDrive, SharePoint)
- M365 Configuration
- M365 Governance
- Alignment with IT – roadmap and Objectives

# UNDERSTANDING THE STRATEGY

- Assess Current IM Practices
- Engage Consulting Firm as a Trusted Partner
- Engage with Stakeholders – Define Requirements
- Establish/Revise Information Management Program
- Information Management Policies and Procedures (Email Management, Scanning)
- Increase Information Management Awareness
- Define SharePoint Online Design - Align with TOMRMS
- Provide Ongoing Change Management and End User Support
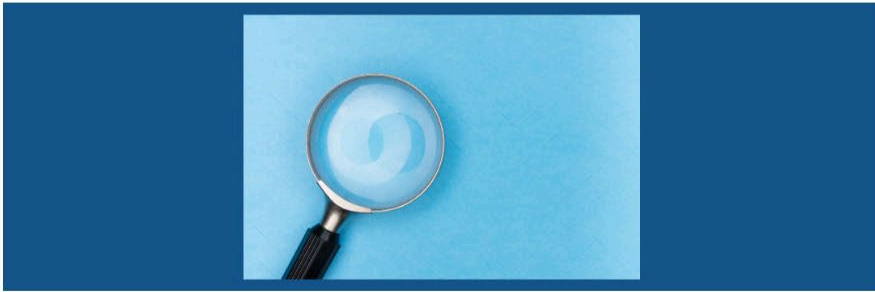
# Benefits of TOMRMS

TOMRMS is a complete methodology for managing municipal records in compliance with legislative obligations and industry standard best practices.



**FILE PLAN BASED ON MUNICIPAL FUNCTIONS**
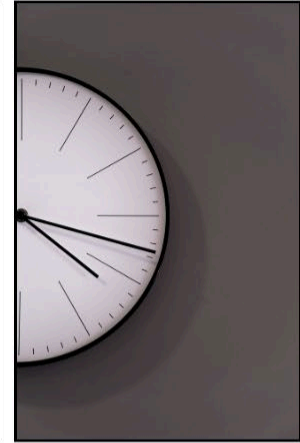


**COMPLIANT RETENTION SCHEDULE**



**STRUCTURE FOR ORGANIZATION OF INFORMATION**



**TAXONOMY FOR ELECTRONIC RECORDS**

# TOMRMS +
# M365 PURVIEW

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## TOMRMS Manual ▥⌄

| | Name ⌄ | Modified ⌄ | Release Date ⌄ | Reference Notes ⌄ | Modified By ⌄ |
|---|---|---|---|---|---|
| 📁 | TOMRMS Manual - August 2024 | August 22 | | | Nina |
| 📁 | TOMRMS Manual - July 2023 | August 7, 2023 | | | Nina |

- M365 Governance

- SharePoint Online Architecture

- TOMRMS

- Purview

- Training and Change Management Support

- Make Network Drives Read-Only

# The Information Professionals

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