



Advanced Electronic Records Institute

October 19, 2014 – October 24, 2014
Salt Lake City, UT

Sunday, October 19, 2014

6:00 | Early-Bird Dinner – Macaroni Grill

Monday, October 20, 2014

Breakfast provided by Hyatt Place; instructional sessions held at the Utah State Archives

8:30 – 9:00	Registration
9:00 – 9:15	Agenda & Institute Overview – Matt Veatch, Kansas State Archivist & Institute Moderator
9:15 – 10:45	Introductions & Institute Expectations – all participants and instructors
10:45 – 11:00	Morning Break
11:00 – 12:00	Organizational Context: Setting the Stage – Nancy McGovern, MIT with Matt Veatch
12:00 – 1:30	Lunch (on your own)
1:30 – 2:45	Prioritizing Challenges – Nancy McGovern Exercise: Program Attributes & Analysis – Nancy McGovern and Kari Smith, MIT
2:45 – 3:00	Afternoon Break
3:00 – 4:00	<i>Role-based breakout session - Taking the Pulse:</i> <ul style="list-style-type: none">• Administrator: Assess resources, desired outcomes, and impact• Manager: Develop a project-based plan• Archivist: Walk through examples of defining requirements
4:00 – 5:00	Demonstration: Axaem & Oregon/HP TRIM Dinner (on your own)



Tuesday, October 21, 2014

Breakfast provided by Hyatt Place; instructional sessions held at the Utah State Archives

9:00 – 10:15	Landscape Overview – Nancy McGovern
10:15 – 10:30	Morning Break
10:30 – 12:00	Digital repository management using OAIS – Nancy McGovern Exercise: mapping policies, metadata, roles, resources to a standards-based framework
12:00 – 1:30	Lunch (own your own)
1:30 – 2:30	Building Your Program: Self-Assessment for Progress – Nancy McGovern
2:30 – 2:45	Afternoon Break
2:45 – 4:00	<i>Role-based breakout session on Revisiting Your DPC Self-assessment:</i> <ul style="list-style-type: none">• Administrator: Assess planning, resources (skills), desired outcomes, and impact• Manager: Analyze the components of a programmatic approach• Archivist: Work on examples of implementation case studies
4:00 – 4:45	Demonstrations: Drupal-based TRAC Review tool – Nancy McGovern Dinner (on your own)

Wednesday, October 22, 2014

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9:00 – 10:15	Decision making for action: policy development and implementation – Nancy McGovern
10:15 – 10:30	Morning Break
10:30 – 12:00	Overview of Workflows and Microservices – Kari Smith, Courtney Mumma



12:00 – 1:30	Lunch (on your own)
1:30 – 2:30	Adaptive Workflows for Responding to Technology – Kari Smith, Courtney Mumma Exercise: Constructing Workflows
2:30 – 2:45	Afternoon Break
2:45 – 3:45	<i>Role-based breakout session on tool-based workflows:</i> <ul style="list-style-type: none"> • Administrator: Discuss workflow issues then join Manager or Archivist • Manager: Work through programmatic implementation and choices • Archivist: Walk through examples of specific workflow steps and decisions
3:45 – 5:00	Demonstration: Archivemata & Preservica
6:00	Group Dinner – Lamb’s Grill

Thursday, October 23, 2014

Breakfast provided by Hyatt Place; instructional sessions held at the Utah State Archives

9:00 – 10:00	Overview: Program Development– Nancy McGovern Building capacity through experimentation and assessment – Kari Smith, Nancy McGovern
10:00 – 10:15	Morning Break
10:15 – 11:00	Standards for long-term management of electronic records – Cal Lee
11:00 – 12:00	Topic: Digital Forensics for electronic records management – Cal Lee, Kari Smith Exercise: Can you crack the redaction?
12:00 – 1:30	Lunch provided by FamilySearch, Inc.
1:30 – 2:15	Identifying and Serving Designated Communities – Nancy McGovern & Kari Smith Special Topic: Developing Strategic Partnerships
2:15 – 2:30	Afternoon Break



2:30 – 3:00	Special Topic: Investing in Technology Over time – Nancy McGovern
3:00 – 4:00	<p><i>Role-based breakout session on using digital forensics for electronic records:</i></p> <ul style="list-style-type: none"> • Administrator: Consider resources (skills) then join Manager or Archivist • Manager: Analyze the components of a programmatic approach • Archivist: Work on examples of implementation case studies
4:00 – 5:00	Demonstration: BitCurator – Cal Lee, UNC-Chapel Hill
	Dinner (on your own)

Friday, October 204, 2014

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9:00 – 10:30	<p>Cost Models and Sustainability Strategies – Neil Grindley</p> <p>Discussion: Allocation Options in Practice – Kari Smith</p>
10:30 – 10:45	Morning Break
10:45 – 12:30	<p>Revisiting themes from the week & Imagining Your Future</p> <p>Charting your course: establishing top priorities for your program (lunch provided)</p>
1:00	Tour of the Utah State Archives (optional)

