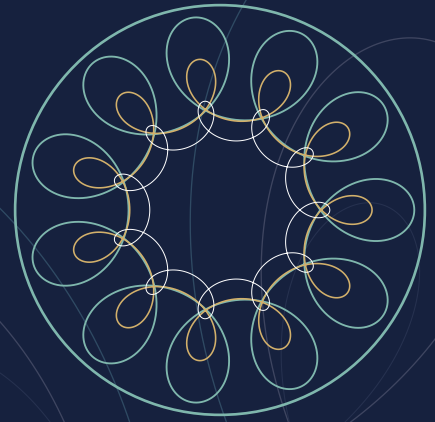


International Institute of Applied AI Technology



Course guide for AI-RIM

Certified AI Records and Information Management Professional

Apply AI to classification, metadata, retention, discovery and migration of documents and records, while keeping the evidential value and compliance that records management exists to protect.

About this guide

Apply AI to classification, metadata, retention, discovery and migration of documents and records, while keeping the evidential value and compliance that records management exists to protect.

This guide sets out what the AI-RIM examination covers and how to prepare for it. It assumes you already practice document and records management, and concentrates on what changes when AI is part of the work.

How to use it

Work through the modules in order. Each one sets out the ideas, lists the topics the exam can test, and ends with an exercise. Do the exercises on your own projects where you can: the exam questions are written around the same situations.

Who it is for	Records managers, document control staff, information governance officers and ECM administrators.
Recommended experience	Two years in records, document or content management.
Study time	About 30 hours
Exam	12 multiple-choice questions in 30 minutes, online. Pass mark 9 correct.
Certification	Valid for 3 years, with a printable certificate and a verifiable credential number.

Learning outcomes

When you have completed this program you will be able to:

- Use AI to classify content against a file plan and retention schedule
- Design automated metadata extraction with quality controls
- Apply retention and disposition with defensible human oversight
- Assess a repository's readiness to be used by AI tools
- Plan AI-assisted migration and clean-up of legacy content
- Keep records authentic, reliable and auditable when AI touches them



Contents

Module 1. Records principles in an AI setting

Module 2. Auto-classification and the file plan

Module 3. Metadata extraction and enrichment

Module 4. Retention, disposition and legal hold

Module 5. Repository readiness for AI

Module 6. AI-assisted migration and clean-up

Preparing for the exam



Module 1

Records principles in an AI setting

Authenticity, reliability, integrity and usability are the tests a record must pass. AI tools must support them, not wear them away.

Topics covered

- Records versus documents versus data
- The lifecycle from capture to disposition
- Evidential value and chain of custody
- Where AI helps and where it creates risk

Exercise

List the points in your organization's records lifecycle where AI could act, and the integrity control each would need.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 2

Auto-classification and the file plan

Training and rules-plus-model approaches that map content to a business classification scheme.

Topics covered

- Business classification schemes and functional file plans
- Training sets drawn from well-filed content
- Confidence thresholds and review queues
- Measuring classification accuracy over time

Exercise

Choose 200 documents to form a training and test set for one branch of a file plan, explaining your sample.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 3

Metadata extraction and enrichment

Pulling dates, parties, identifiers and subjects from documents, and controlling the quality of what is written back.

Topics covered

- Intelligent document processing
- Controlled vocabularies and authority lists
- Validating extracted values
- Provenance: recording that a value was machine-generated

Exercise

Specify the metadata schema and validation rules for AI extraction from a set of contracts.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 4

Retention, disposition and legal hold

AI can propose retention classes and find content due for disposal. Decisions to destroy remain accountable to people.

Topics covered

- Linking classifications to retention rules
- Disposition review with AI-assisted sampling
- Legal hold identification
- Certificates of destruction and audit

Exercise

Design a disposition approval workflow where AI proposes and a records officer confirms.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 5

Repository readiness for AI

Generative AI and search tools are only as good as the repository they read. Duplicates, stale versions and broken permissions all surface in answers.

Topics covered

- Redundant, obsolete and trivial content
- Version and duplicate control
- Permission hygiene and over-sharing
- Readiness scoring and remediation plans

Exercise

Run a readiness assessment on one shared drive or library and estimate the share of content that is redundant, obsolete or trivial.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 6

AI-assisted migration and clean-up

Moving content between systems with AI handling classification, de-duplication and mapping, and people handling exceptions.

Topics covered

- Content inventory and analysis
- Mapping old structures to new
- De-duplication and near-duplicate detection
- Migration validation and sign-off

Exercise

Write the validation steps that prove a migrated collection is complete and its metadata is intact.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Preparing for the exam

The AI-RIM exam has 12 multiple-choice questions drawn at random from every module. You have 30 minutes and need 9 correct answers to pass.

Before you start

- Finish every module's exercise. Most questions describe a situation and ask what a practitioner should do.
- Re-read the module summaries: they state the main idea each question is built on.
- Set aside uninterrupted time. The timer keeps running if you leave the page.
- Have this guide to hand. The exam is open book, but you will not have time to look up every answer.

Taking the exam

Log in to your account on the Institute's website and choose Take the exam. Check that your name is shown exactly as it should appear on your certificate. Your result is shown as soon as you submit, and if you pass, your certificate and credential number are issued straight away.

If you don't pass, you can try again after 24 hours. Each attempt draws a different set of questions.

