

PERSONAL INFORMATION MANAGEMENT



Co-funded by the
Erasmus+ Programme
of the European Union

MODULE N°4

GREEN LABS



OBJECTIVES

- ❑ Increasing participants' awareness about their personal information management strategies
- ❑ Sharing with participants techniques to identify and access, open databases and open access resources to find valuable information, going in depth and keeping themselves updated on the topic/s
- ❑ Helping participants in setting tools to automatically find and collect data and information on a specific topic
- ❑ Making learners understand AI Fundamentals to search for information related to specific topics
- ❑ Making learners explore how AI is being used in working contexts, with a focus on its current applications, benefits, and potential challenges

GREEN LABS PROJECT - INTERNATIONAL LIVING LABS NETWORK FOR GREEN INNOVATION

- **GREEN LABS** is a European **Erasmus+ project** aimed at supporting the **green transition** by strengthening innovation and sustainability in **vocational education and training (VET)**.
- The project develops a **European network of local "living labs"** where stakeholders collaborate to design and test **territorial initiatives for ecological and circular transition**.
- It introduces a new professional profile - **Green Innovation Managers (GIM)** - trained to facilitate innovation processes and support sustainable projects in local ecosystems.
- The project also creates a **digital platform and support services** to connect labs, share knowledge, and enable cooperation among partners and stakeholders across Europe.



INCREASING PARTICIPANTS' AWARENESS ABOUT THEIR PERSONAL INFORMATION MANAGEMENT STRATEGIES



DEFINING "PERSONAL INFORMATION MANAGEMENT (PIM)"

Personal Information Management (PIM) refers to both the practice, and the study of the activities people perform to acquire, organize, maintain and retrieve information for everyday use. One ideal of PIM is that we always have the right information in the right place, in the right form, and of sufficient completeness and quality to meet our current need, (W. Jones & Maier, 2003).

To have the right information accessible in the shortest time and easiest way represents an added value for everyone, in the daily settings, especially professional settings. PIM becomes crucial to manage complex initiatives and projects, requiring a multidisciplinary approach, as the GIM is supposed to do within the living labs.



PIM STRATEGIES IN ACTION

Every person has its own PIM strategies and practices, put in place in daily settings and activities. Often PIM approaches are put in place “automatically”, without full awareness and consciousness of that.

PIM activities are an effort to establish, use, and maintain a mapping between information and need. Activities of finding (and re-finding) move from a current need toward information while activities of keeping move from encountered information toward anticipated need

What about You?

Which strategies you adopt to process, store and access relevant information?

Let’s discuss, brainstorm, discuss and share through a digital dashboard accessible here: [space to include the link to a simple digital dashboard to collect hints by participants. Suggester time 30’ for the entire brainstorming phase, remaining time (20min) for discussion, systematization by teacher/s.]



Personal Information Management

https://www.researchgate.net/publication/353066718_Personal_Information_Management

Jones, William & Dinneen, Jesse & Capra, Robert & Diekema, Anne & Pérez-Quiñones, Manuel. (2021). Personal Information Management. 10.48550/arXiv.2107.03291. [Estimated reading time 1 hour]

*Read More
through the
article here*



LEARN MORE

Self-learning

MANAGING PERSONAL INFORMATION: TACTICS, STRATEGIES, AND OUTCOMES

Whilst previous research reports a range of individual behaviors for managing personal information, less is known about the relationships between these behaviors. Knowledge workers are known to manage more or less, either file or pile, use more or less sophisticated classification, manage sooner or later, and delete or retain. The article undertake research to better understand the totality of users' behaviors in dealing with information, investigating user preferences, patterns of adoption, effectiveness of current PIM solutions, and outcomes from investment in management effort.

Paul Englefield, Russell Beale, Managing personal information: tactics, strategies, and outcomes, *Interacting with Computers*, 2025;, iwaf054, <https://doi.org/10.1093/iwc/iwaf054>

While you watch – focus on:

- Behaviours people put in practice to find, store, and re-find relevant information or data sources
- Reflect on your own PIM techniques and try to identify potential improvements



Click here to access the article Estimated reading time 1 hour

SHARING WITH PARTICIPANTS TECHNIQUES TO IDENTIFY AND ACCESS,
OPEN DATABASES AND OPEN ACCESS RESOURCES TO FIND VALUABLE
INFORMATION, GOING IN DEPTH AND KEEPING THEMSELVES
UPDATED ON THE TOPIC/S

HELPING PARTICIPANTS IN SETTING TOOLS TO AUTOMATICALLY FIND
AND COLLECT DATA AND INFORMATION ON A SPECIFIC TOPIC



INFORMATION MANAGEMENT: FREQUENT CHALLENGES

- Fragmented information on an issue/topic
- Gaps in a “body of knowledge” on a topic
- Redundance of information (e.g., searching on internet, etc.)
- Poor information/data quality and inconsistency
- Information/Data silos (for example in a company, between unites or departments)
- Growing of information
- Sharing of information with others

Reflection

According to your professional experience, which the above are the challenge your organization/the organizations you work/worked feels the most?



INFORMATION MANAGEMENT: NEW CHALLENGES IN THE DIGITAL ERA

Massive digitalization of processes and, procedures and overall human activities, together with the AI disruption, bring further key challenges from a (personal and organizational information management perceptive:

- Safety and security of data and information
- Privacy compliance of data and information treated and stored
- Affordability of information (always present, but amplified by digital technologies)
- Ethics of information and data

So-called
"Shadow AI"

According to LayerX Security's Enterprise AI and SaaS Data Security Report 2025, employees regularly paste sensitive corporate data into AI chatbots—often from personal, unmanaged accounts that bypass enterprise controls. 77% of online LLM access is to ChatGPT. Approximately 18% of enterprise employees paste data into GenAI tools and more than 50% of those paste events include corporate information.



INFORMATION MANAGEMENT EFFECTIVE STRATEGIES

IM is an asset:

In today's data-driven world, information is considered one of the most valuable assets for organizations.

Effective Information Management (IM) ensures that the right information is available to the right people at the right time.

IM is essential for maintaining organizational efficiency, facilitating decision-making, and providing a competitive advantage.

Consider that:

- ✓ **Effective IM begins with the proper collection and storage of information.**
- ✓ **Effective communication and collaboration among teams are critical to efficient IM.**
- ✓ **Structured data collection and analysis can support decision making process and, first the identification of emerging needs**

THE WORLD OF OPEN ACCESS RESOURCES

What is open access?

Open access is the practice of providing online access to scientific information that is free of charge and reusable to the user. This includes both peer-reviewed publications and data underlying publications, or other datasets [source: *EU Commission*].

Some Example:

<https://libguides.worldbank.org/>

[OpenAlex: The open catalog to the global research system | OpenAlex](#)

[Directory of Open Access Journals - DOAJ](#)

[Open Research Europe | Open Access ... | Open Research Europe](#)

[European Citizen Science Platform](#)

To organise a PiM platform, Open Access Resources can represent a valuable asset to access a variety of curated free of charge resources, data bases, training resources, research and studies. European Commisiion supports and promore Open access and open ascience as well, to make knowledge accessible, and freely circulating.



SUGGESTIONS FOR AN EFFECTIVE DIGITAL PIM APPROACH

- ✓ Identify, select and cluster affordable resources
- ✓ While selecting and storing, prioritise accessibility and sharing, guaranteeing security and GDPR compliance if necessary)
- ✓ Ping Portals and repositories to a quick refinding of the sources
- ✓ Use tailored alerts to stay updated on topics of your interest
- ✓ Actively participate in Online Thematic groups/Community of Practices for knowledge sharing
- ✓ Define when deleting «old » resources
- ✓ Use digital tools to create your PIM dashboard/s
- ✓ Ask your properly trained AI assistant to scan the web periodically to find valuable new resources and updates





Information Management: Key Concepts, Strategies, and Trends

Information Management (IM) refers to the process of collecting, storing, organizing, and distributing information within an organization or system. The rapid development of digital technologies has transformed information management practices, enabling organizations to optimize their workflows, enhance decision-making, and achieve better organizational outcomes. This review article examines key concepts, strategies, trends, and challenges in Information Management, including the integration of emerging technologies such as artificial intelligence (AI) and big data, as well as the importance of data governance and security.

Hussain, I., (2023). Information Management: Key Concepts, Strategies, and Trends. ISAR Journal of Economics and Business Management, 1(3), 22-24.

[1749554319-Information-Management-Key-Concepts,-Strategies,-and-Trends.pdf](#)

[Estimated reading time 1 hour]



MAKING LEARNERS UNDERSTAND AI FUNDAMENTALS TO SEARCH FOR INFORMATION RELATED TO SPECIFIC TOPICS

MAKING LEARNERS EXPLORE HOW AI IS BEING USED IN WORKING CONTEXTS, WITH A FOCUS ON ITS CURRENT APPLICATIONS, BENEFITS, AND POTENTIAL CHALLENGES



HOW AI HAS BEEN TRANSFORMING PIM

AI is changing PIM strategies fast. AI in PIM automates tasks like translation, content generation, and product categorization, saving time and reducing human error. With AI, brands can scale product content across multiple markets and languages, ensuring consistency.

Trained AI agent can support PIM actively, for example helping in **organizing, securing, and analyzing user data across various platforms**.

In PIM AI agents can support as follows:

- **Autonomous Task Execution:** AI agents can automatically retrieve, sort, and store personal data, saving time and effort for users.
- **Multi-Agent Processing:** Various AI agents can collaborate to manage different categories of data, such as financial records, health information, and social media interactions.
- **Model-Agnostic Chat Interface:** Users can communicate with their AI agents via a simple chat interface to request specific data retrieval or analysis without requiring coding skills (source: [Transforming Personal Data Management with AI Agents | AI Agent](#)).



HOW AI HAS BEEN TRANSFORMING PIM- CASE STUDIES & EXAMPLES

Case Study n. 1: How AI Agents Are Transforming Contract Review

In the legal industry, contract review is a critical yet time-consuming task. AI agents are transforming this process by automating and streamlining contract analysis, leading to increased efficiency and reduced errors.

AI agents utilize advanced technologies such as natural language processing (NLP) and machine learning to:

Automate Contract Analysis: Quickly identify and extract key information from contracts, including parties involved, terms, and clauses.

Enhance Accuracy: Minimize human errors by consistently applying predefined criteria and guidelines.

Ensure Compliance: Monitor contracts for adherence to relevant laws, regulations, and organizational policies.



HOW AI HAS BEEN TRANSFORMING PIM- CASE STUDIES & EXAMPLES

Case Study n. 1: How AI Agents Are Transforming Contract Review (SOURCE: [AI Agents Transforming Contract Review in Legal Services | AI Agent](#))

Implementing AI agents in contract review offers several advantages:

Increased Efficiency: Accelerate the review process, allowing legal teams to handle a higher volume of contracts.

Cost Savings: Reduce the need for extensive manual labor, leading to significant cost reductions.

Improved Risk Management: Identify potential risks and compliance issues early, mitigating potential legal challenges.

BUT IT IS NECESSARY TO TAKE INTO ACCOUNT THAT:

- **Assessing Organizational Needs:** Determine specific requirements and objectives for AI implementation.
- **Selecting Appropriate Tools:** Choose AI contract review tools that align with organizational goals and compliance standards.
- **Training and Customization:** Customize AI tools to understand and apply company-specific policies and guidelines.
- **Continuous Monitoring and Improvement:** Regularly evaluate AI performance and make necessary adjustments to enhance effectiveness.

HOW AI HAS BEEN TRANSFORMING PIM- CASE STUDIES & EXAMPLES

Case Study n. 2: PIM, AI and Circular economy

Circular economy (CE) implies reduction of waste and a consequent collection of key information regarding a product, for example, from its design to recycling. Circular economy means informed decisions and strategic information and data management. Ai can support the collection of data, its analysis, continuous monitoring, etc. So, AI has been becoming crucial to boost CE.

To explore more, you can read the following article here: [Artificial intelligence and the circular economy | Ellen MacArthur Foundation](#)

HOW AI HAS BEEN TRANSFORMING PIM- CASE STUDIES & EXAMPLES

Case Study n. 3: Leveraging artificial intelligence to enhance systematic reviews in health research: advanced tools and challenges

(SOURCE: [Leveraging artificial intelligence to enhance systematic reviews in health research: advanced tools and challenges - PMC](#))

"Artificial Intelligence (AI) is transforming systematic reviews (SRs) in health research by **automating processes such as study screening, data extraction, and quality assessment**. This perspective highlights recent advancements in AI tools that enhance efficiency and accuracy in SRs. It discusses the benefits, challenges, and future directions of AI integration, emphasizing the need for human oversight to ensure the reliability of AI outputs in evidence synthesis and decision-making in healthcare".

The article suggests an interesting case study and a set of AI based tools for searching data, scanning, comparing, so-called: "commonly used AI tools in different systematic review processes".

HOW AI HAS BEEN TRANSFORMING PIM- CASE STUDIES & EXAMPLES

Case Study n. 4: Let's Practice Together

First step: The teacher introduce to students the new frontiers in research-based activities supported by AI Applications.

The teacher can mention the following article to this purpose: [AI4Research: A Survey of Artificial Intelligence for Scientific Research](#) [August, 2025]

II step: From the article, the teacher select an AI application to research and structuring some guiding questions, will ask students in groups to read the article and for the selected application, to analyse it though the guiding questions, asking for reporting supported by detailed explanations and critical considerations.

III step: Debriefing: each group will nominate a reporter, sharing the main findings (30' max depending on the number of groups). The teacher will support debriefing with questions and further explanations

IV step: Final Quiz in plenary (through KAHOOT or similar to sum up take aways)



SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q1 What does PIM stand for in the context of this training module?

A) Project Information Marketing

B) Personal Information Management

C) Personal Information Monitoring

D) Professional Information Mapping

Click any answer to see if you got it right.

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Next Question →

SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q2 "According to the presentation, PIM approaches are always applied consciously and deliberately by individuals."

A) True

B) False

Click any answer to see if you got it right.

Quiz: PERSONAL INFORMATION MANAGEMENT

Q2 "According to the presentation, PIM approaches are always applied consciously and deliberately by individuals."

A) True

B) False

The presentation states that PIM approaches are often put in place "automatically," without full awareness or consciousness of that.

Next Question →

SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q3 Which of the following is NOT mentioned as a frequent challenge in information management?

A) Fragmented information on an issue/topic

B) Excessive standardization of data formats

C) Information/data silos between units or departments

D) Redundance of information when searching online

Click any answer to see if you got it right.

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SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q4 What term does the presentation use for employees pasting sensitive corporate data into personal, unmanaged AI chatbot accounts?

A) Data leakage

B) Ghost computing

C) Shadow AI

D) Blind automation

Click any answer to see if you got it right.

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SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q5 According to the "Information Management Effective Strategies" slide, what does effective IM begin with?

A) Defining a data deletion policy

B) Hiring a dedicated data officer

C) Selecting an AI vendor

D) The proper collection and storage of information

Click any answer to see if you got it right.

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SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q6 What does "Multi-Agent Processing" refer to in the context of AI supporting PIM?

A) Various AI agents collaborating to manage different categories of data (e.g., financial, health, social media)

B) A single AI agent handling all data types at once

C) Multiple users sharing one AI chat interface

D) AI agents competing to produce the fastest search result

Click any answer to see if you got it right.

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SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q7 Which of these is given as an example of an open access resource in the presentation?

A) Bloomberg Terminal

B) ChatGPT Plus

C) LinkedIn Learning

D) OpenAlex

Click any answer to see if you got it right.

Quiz: PERSONAL INFORMATION MANAGEMENT

Q7 Which of these is given as an example of an open access resource in the presentation?

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Next Question →

SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q8 In Case Study 1 (AI Agents Transforming Contract Review), which factor is NOT listed as something to take into account before implementing AI?

A) Assessing organizational needs

B) Selecting appropriate tools

C) Training and customization of AI tools

D) Reducing the size of the legal team immediately

Click any answer to see if you got it right.

Quiz: PERSONAL INFORMATION MANAGEMENT

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SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q9 According to the presentation, how does AI support the connection between Personal Information Management and the Circular Economy?

A) By replacing the need for product design data

B) By eliminating the need for recycling data collection

C) By supporting the collection, analysis, and continuous monitoring of product-related data

D) By automatically enforcing GDPR compliance

Click any answer to see if you got it right.

Quiz: PERSONAL INFORMATION MANAGEMENT

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SELF-ASSESSMENT QUIZ

Quiz: PERSONAL INFORMATION MANAGEMENT

Q10 Who authored the definition of PIM cited in the presentation ("we always have the right information in the right place...")?

A) W. Jones & Maier (2003)

B) Englefield & Beale (2025)

C) Hussain (2023)

D) Whittaker, Rader & Bergman (2026)

Click any answer to see if you got it right.

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D) Whittaker, Rader & Bergman (2026)

End of quizz

IN DEPTH MATERIALS FOR READING



Steps involved in Information Management [Video]

The future of personal information management in the age of ubiquitous personal data [Article]

UNESCO Recommendation on Open Science

The video explains the steps involved in managing information, including collecting and storing data, retrieving it using databases, ensuring security through encryption, processing raw data into meaningful information, analyzing patterns to make decisions, and securely transmitting data while mitigating risks like interception
<https://youtu.be/QuWhyZKFbwM?si=REyYjjmEXTTAyCkO>

Whittaker, S., Rader, E., & Bergman, O. (2026). The future of personal information management in the age of ubiquitous personal data. *Human-Computer Interaction*, 41(1), 1-5.
<https://doi.org/10.1080/07370024.2025.2482191>

Open science is a set of principles and practices that aim to make scientific research from all fields accessible to everyone for the benefits of scientists and society as a whole. Open science is about making sure not only that scientific knowledge is accessible but also that the production of that knowledge itself is inclusive, equitable and sustainable.

<https://www.unesco.org/en/open-science/about>

**THANK YOU FOR YOUR
PARTICIPATION!**

GREEN LABS PROJECT

The GREEN LABS project aims to support and stimulate the green transition by promoting innovation and greening of VET systems through internationalization, exchange of practices, and knowledge sharing among partners, in accordance with the Osnabrück Declaration of 2020 on vocational education and training for sustainable competitiveness, social fairness and resilience.

