



WORKSITE 8.5

AUTONOMY IMANAGE SYSTEM ADMINISTRATOR COURSE

TITLE: WORKSITE 8.5 AUTONOMY IMANAGE SYSTEM ADMINISTRATOR UPGRADE COURSE

DURATION: 2 DAYS

COURSE DESCRIPTION

The iManage WorkSite 8.5 System Administrator Upgrade Course provides 2 Days of “Hands-on Training” that allows the participants to learn the latest features and structure of the iManage WorkSite 8.5 environment by working directly in their own testing environment. Emphasis is given to the considerations required for upgrading to version 8.5. Fully documented materials are provided including tutorials & example configurations.

WHO SHOULD ATTEND?

IT personnel preparing for a WorkSite upgrade	Partner Consultants who will install and configure WorkSite
Project Managers responsible for managing a WorkSite rollout	System Engineers
Network Engineers	Software Integrators
Application Design Consultants	Third Party Integrators
Consulting Partners	

COURSE PREREQUISITES

DMS System Administrator Experience with previous versions of WorkSite	Basic understanding of ASP and XML
Windows Server 2000 or Advanced Server Certification or equivalent	MS SQL, Oracle or Sybase SQL Certification or equivalent
Knowledge of Web Servers, TCP/IP LAN/WAN	



COURSE MODULES

DAY 1

- Module 1: WorkSite 8.5 Server and Client Upgrade Essentials
- Module 2: Configuring the WorkSite (IDOL) Indexer
- Module 3: Clustering
- Module 4: Sizing, Troubleshooting, and Best Practices

DAY 2

- Module 5: Application Upgrade Essentials
- Module 6: Advanced Searching
- Module 7: Communications Server Essentials
- Module 8: E-Mail Management for Outlook
- Module 9: Working Offline with OffSite 8.5

COURSE OUTLINE

DAY 1

General pre-course administration (introductions, orientation to facilities and schedule, identification of course objectives, etc.)

MODULE 1: WORKSITE 8.5 SERVER AND CLIENT UPGRADE ESSENTIALS

Identifying Supported Platforms and Application Prerequisites
Review Client and Server Upgrade Process
Discuss new WorkSite Server Features and Settings
Define Multi-byte Support

MODULE 2: CONFIGURING THE WORKSITE (IDOL) INDEXER

Provide an overview of IDOL Server Technology
Review IDOL Server architecture
Discuss how WorkSite integrates with IDOL
Review interaction with IDOL
Discuss the WorkSite 8.5 installation prerequisites and process
Review the WorkSite Indexer Services and indexing process



Configure and install the WorkSite Indexer Services
Set up Service Manager to connect to the IDOL Index

MODULE 3: CLUSTERING

Review the features and benefits of the Distributed Index Handler (DIH) and the Distributed Action Handler (DAH)

Describe DIH and DAH configuration settings within WorkSite IDOL

MODULE 4: SIZING, TROUBLESHOOTING, AND BEST PRACTICES

Explore sizing options and recommendations

Review best practices for implementing the IDOL Indexer

Review troubleshooting scenarios

DAY 2

Review Day 1 terminology, concepts and labs.

MODULE 5: APPLICATION UPGRADE ESSENTIALS

Explore new Records Management Enhancements

Discuss the Enforcement of Matter-Centric Document Filing

Review the options for viewing Document Dates

Conduct searches using the new Express Search Panel

MODULE 6: E-MAIL MANAGEMENT FOR OUTLOOK

Search Process Overview

Verity: The Bucket Approach

Stemming vs. Exact Phrase Matching

The Default AND Search

Extended Full-Text Searching

Wildcard, Numeric, and Alphanumeric Searching

Velocity: Stemming and Wildcards

Versions and Attachments

Boolean Operators



Understanding Search Results

MODULE 7: COMMUNICATIONS SERVER ESSENTIALS

Review Supported Platforms

Discuss Server architecture

Identify Design considerations

Install and configure the Communications Server

MODULE 8: E-MAIL MANAGEMENT FOR OUTLOOK

Discuss new features of E-Mail Management including:

- Filing Toolbar operations
- Predictive Filing
- Filing Folders
- Attachment Options
- Identifying Filed Messages

MODULE 9: WORKING OFFLINE WITH OFFSITE 8.5

Discuss the background synchronization process

Identify new WorkSite Tray status icons

Review changes in the OffSite architecture

Define OffSite synchronization settings

Perform Go Offline and Go Online operations

Explore Conflict Resolution scenarios