



## COURSE AGENDA

### *iMANAGE WORKSITE 8.5 FULL TRAIN-THE-TRAINER COURSE*

**Course Title:** iManage WorkSite 8.5 Train-the-Trainer Course

**Course Length:** Two Days

**Audience:** Trainers who are new to WorkSite or have not trained on it recently that are preparing to facilitate end-user training.

**Overview:** This course introduces trainers to the client interfaces of the iManage WorkSite content management system. Additional add-ins will be taught as well including Email Management, OffSite and WorkSite Web.

The course will be hands-on in nature wherein the participants will have an opportunity to apply the skills that they learn right after it is demonstrated.

### **Course Content**

#### **DAY 1 MORNING**

- Exploring the iManage FileSite 8.5 Desktop UI
- Using Basic FileSite Functions
- Using the WorkSite Tree to Navigate to Workspaces, Folders, and Documents
- Managing Shortcuts
- Searching for Workspaces and Content

#### **LUNCH HOUR**

#### **DAY 1 AFTERNOON**

- Using Content Management Features (Versions, Where Used, Relations, History, etc.)
- Saving Documents
- Email Management
- Viewing a Document's Profile

#### **DAY 2 MORNING**

- Creating Folders
- Using Folder Commands
- Re-file Capability
- Exploring Security and Other Profile Options
- Checking In/Out and Importing Documents
- Customizing the Outlook View
- Setting FileSite Options
- Using WorkSite Viewer

#### **LUNCH HOUR**

#### **DAY 2 AFTERNOON**

- OffSite Synchronization - Set up and Best practices overview
- WorkSite Web introduction
- MS Word iManage Features
- Interwoven Express Search, WorkSite Miner and Query Builder
- Overall Course Review / Q&A