

iManage Work 10 Certified System Engineer

5-day Course

Designed for server administrators or engineers with little previous iManage experience.

Who is this course for?

If you are an experienced IT staff member or IT partner without prior iManage experience, you will need to know how to install, configure and sustain the Work 10 system. This course gives you hands-on experience installing and configuring each major component of Work 10. You will learn in detail Work 10 functionality and how it impacts a user's experience. A week invested in training at iManage will save you months of learning and testing each new feature on your own.

What will be covered?

This course will prepare an experienced IT administrator to install Work 10 server, Indexer, Comm Server, Web server, Refile Service, administrative tools and supported clients. This course covers the deployment of iManage clients, including the responsive Web interface, DeskSite, FileSite, Email Management, as well as enhancements for Office and Adobe integration. You will learn about deploying folder-based document management structures that correspond to the way users organize their work.

Can I get certified?

Attendees who complete this course are eligible to later take a certification exam, which is administered online by a third party. The exam has a separate registration and fee. Details are available at registration.imanager.com or by emailing training@imanager.com.

Who should attend?

- ⇒ IT personnel preparing for a iManage Work installation
- ⇒ Partner consultants who will install and configure iManage Work
- ⇒ Project managers responsible for managing an iManage Work rollout
- ⇒ System Engineers/Network Engineers

What are the prerequisites for attendance?

- ⇒ Prior document management experience
- ⇒ Windows Server or Advanced Server experience is helpful but not required
- ⇒ Microsoft SQL Server, Oracle or Sybase SQL experience is helpful but not required
- ⇒ Knowledge of Web servers, TCP/IP, LAN/WAN is also helpful

What is the agenda?

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| ⇒ Intro to iManage Document Management | ⇒ Perform administrative functions with iManage Control Center | ⇒ Install and use Communication Server and Client-Side Filing |
| ⇒ Install and configure iManage Work Server | ⇒ Configure the iManage Work Indexer and learn best practices | ⇒ Learn the Offline capabilities of Work 10 |
| ⇒ Understand the features of the responsive Web client | ⇒ Encrypt iManage content | ⇒ Learn system design strategies |
| ⇒ Manage Work using installed Admin Utilities | ⇒ Understand client operation and Workspace-centricity | ⇒ Understand iManage Share integration and uses |

Course Highlights

- Learn to install and deploy the iManage Work Server components
- Learn the fundamentals of building Workspace-centric folder structures
- Install and configure iManage Work clients that support the New Professional
- Learn about iManage support for authentication via SAML
- Leverage the role-based administrative capabilities of iManage Control Center
- Implement Gmail integration

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Detailed Agenda:

<p>Module 1: Intro to iManage Work Document Management.....</p> <ul style="list-style-type: none"> What is a DMS? Document Storage and Retrieval Unicode Support Workspace-Centricity..... Work 10 Suite Product Releases..... Lab 1.1: Access to the Training Environment..... <p>Module 2: Install and Configure iManage Work Server.....</p> <ul style="list-style-type: none"> Installation Overview..... Lab 2.1: Install the Preview Server software [INFORMATIONAL] Lab 2.2: Install and Configure iManage Work 10 Server..... Lab 2.3: Install iManage Control Center..... Lab 2.4: Install iManage Work Web Server Lab 2.5: Prepare the SQL Databases Administrative Tools (System Management)..... Lab 2.6: Register and Configure the SQL Databases Lab 2.7: Configure the iManage Work Server and MSH Server..... <p>Module 4: Manage Content with Server Admin Utilities.....</p> <ul style="list-style-type: none"> Administrative Tools (Content Management) Lab 4.1: Document Import – Automatic Import with File Type Lab 4.2: Document Import – Explicit Import with File Extension Lab 4.3: Document Import – File-Filtering Lab 4.4: Test the Document Imports Lab 4.5: Customize Forms Using Dialog Editor Cloning Forms..... Lab 4.6: Clone and Localize Forms Using Dialog Editor Lab 4.7: Support Unicode in the iManage Work Server Registry..... Lab 4.8: Perform Document Administration Using Monitor <p>Module 5: iManage Control Center</p> <ul style="list-style-type: none"> iManage Control Center for Administration..... Lab 5.1: Add the Self-Signed Cert to the Trusted Store Using MMC Lab 5.2: Control Center – Overview Lab 5.3: Control Center – Access (Users, Groups and Roles) Lab 5.4: Control Center – Content Lab 5.5: Control Center – Metadata Lab 5.6: Control Center – Settings..... Lab 5.7: Control Center – Work Clients <p>Module 6: RAVN for Work Indexer</p> <ul style="list-style-type: none"> Special Instructions Install a Basic Indexer for the Original Lab Environment Lab 6.1: Install and Configure a Basic Work Indexer..... <p>Module 7: Encrypt iManage Content</p> <ul style="list-style-type: none"> Encrypting Sensitive Content Lab 7.1: Create Encrypted Windows Folders for iManage Work..... Lab 7.2: Back Up the EFS Certificate and Private Key <p>Module 8: Workspace-Centricity, Web Client & MS Office</p> <ul style="list-style-type: none"> Lab 8.1: Prevent Flat Space Filing..... Lab 8.2: Install the Classic Clients in Compatibility Mode..... Work Desktop for Windows for Microsoft Office Integration..... Lab 8.3: Install Work Desktop for Windows iManage Work: HTMLS Web Client Overview Navigation Options..... Other Features Filters..... Lab 8.4: Explore iManage Work 10 Web Client Lab 8.5: Filters in Work 10 Web Client Lab 8.6: Basic and Advanced Searches in Work 10 Web Client 	<p>Module 3: Administer and Customize iManage Work</p> <ul style="list-style-type: none"> Test the iManage Work Server Configuration Lab 3.1: Install FileSite Lab 3.2: Install DeskSite Lab 3.3: Test the iManage Work Server with Classic Clients Lab 3.4: Add Users Adding Groups and Assign Users..... Lab 3.5: Add Virtual Groups and Assigning Users..... Lab 3.6: Create Virtual External Groups and Add Users Creating Roles and Assigning Members..... Lab 3.7: Create Roles Lab 3.8: Assign Users to Roles Testing Accounts Lab 3.9: Test Roles About the Directory Synchronization Service Lab 3.10: Configure Directory Synchronization Lab 3.11: Set a New Default (Preferred) Database Lab 3.12: Set a New File Server Lab 3.13: Add a New Type to Detect and Open an Audio File Populating the Custom Tables Using the Load Utilities Lab 3.14: Populate Tables Using Load Data..... Lab 3.15: Populate Tables Using CLLOAD.EXE..... Renaming and Disabling User Accounts..... Lab 3.16: Rename a User..... Lab 3.17: Disable a User..... Lab 3.18: Test Accounts, File Server, and File Types User Photos in iManage Work Lab 3.19: Use the Upload User Photo Tool..... <p>Module 9: Advanced Client Features.....</p> <ul style="list-style-type: none"> Workspace Structure Ad Hoc Workspaces, Flexible Folders & Folder Upload Lab 9.1: Explore Ad Hoc Workspaces, Flex Folders & Folder Upload Lab 9.2: Document Upload / Advanced Upload Lab 9.3: Save Documents and Versions Using Work 10 Integration My Matters, Categories and Subscriptions..... My Favorites Lab 9.4: Explore My Matters and My Favorites Lab 9.5: Examine Advanced Document Functions Lab 9.6: Use the Trash Bin in Clients and Control Center Lab 9.7: Journaling in iManage Work..... Lab 9.8: Use Express Search and iManage Miner [OPTIONAL]..... <p>Module 10: Communication Server & EMM Essentials</p> <ul style="list-style-type: none"> Exchange Web Services Server-Side Email Filing Lab 10.1: Install the Communication Server..... Lab 10.2: Configure the Communication Server Service..... Introduction to Email Management (EM) for Outlook..... Client-Side Filing with Desktop WCS Lab 10.3: Configure and Test Desktop WCS Lab 10.4: Outlook Integration with Email Management..... Lab 10.5: View 'Classic' Email Management [OPTIONAL]..... iManage Gmail Extension Lab 10.6: Configure the iManage Gmail Extension [OPTIONAL]..... <p>Module 11: Refile Service.....</p> <ul style="list-style-type: none"> Lab 11.1: Install Refile Service and Configure in Service Manager Lab 11.2: Configure Refile Service in Control Center..... Lab 11.3: Validate the Refile Process.....
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