

Using iManage for Basic Knowledge Collation and Curation

Creating Overview Guides to Collate Key Content

Without effective document profiling, users may have difficulties with searching for and retrieving key content in iManage. Therefore firms may wish to create overview guides for specific practice areas or role types to provide quick access to core know-how.

Practice Area/Role Overview Guides

- Create a Word document listing NRL links to key documentation stored within the DMS, with one guide per practice area or per role type.
- Consider incorporating a bullet-pointed list of areas of expertise someone should be familiar with if joining the team, to help new starters or remind longstanding staff.
- Consider listing the firm's legal technology tools relevant to the individual's practice area or role which staff may not be aware of, and highlight how readers can access and use these tools for efficient working practices.

This basic approach to guiding users through the DMS will help to streamline onboarding workflows and ensure that teams are able to quickly access necessary information.

Creating Knowledge Workspaces within iManage

The first stage of exploring knowledge curation with the DMS

Creating knowledge stores within iManage for individual practice areas can be a good first step towards exploring knowledge curation. iManage Knowledge Workspaces can include folders for specific document types such as precedents or checklists, with documents curated at a basic level with appropriate metadata.

To create an iManage Knowledge Workspace:

1. Include Practice Area data labels in the profile of iManage documents so that users can mark practice-specific knowledge and surface it in searches.
2. Add a custom knowledge tick-box field to your iManage document profile to that users can search specifically for documents of this type.
3. Create designated Knowledge Workspace per practice area as a document destination within iManage, so that documents marked with 'knowledge' are filed there automatically.
4. Encourage the knowledge team to set up saved searches for the iManage system to look for documents marked with the 'knowledge' tick box, and labelled with relevant Practice Area labels.
5. Create a guide for the wider firm highlighting how to save relevant knowledge searches within iManage to quickly surface newly stored and tagged know-how.