

Updated on 05/12/2026

Sign up

IRIS Training: Collaborative Digital Platform

2 days (14 hours)

Overview

IRIS is a collaborative digital platform designed to centralize information, streamline communication, and secure processes. It addresses use cases such as document management, activity tracking, project spaces, and internal communication.

This training guides you through getting started with IRIS: structuring spaces, organizing content, defining permissions, and setting up simple workflows (approval, distribution, archiving). The goal is to empower your teams and improve traceability in day-to-day operations.

The approach is hands-on: guided workshops, demos, exercises in a test environment, and realistic scenarios (project, department, committee). You'll leave with deliverables: a configuration checklist, a site map template, a roles/permissions matrix, and an operational deployment plan.

Like all our training courses, this one will introduce you to **the latest stable version** of the technology and its new features.

Objectives

- Configure a collaborative space (pages, libraries, views).
- Structure and classify documents using metadata and rules.
- Manage users, roles, permissions, and sharing.
- Set up a validation workflow and notifications.
- Administer, audit, and improve usage (best practices).

Target audience

- Project managers and PMO
- Business managers / collaboration liaisons
- Functional administrators
- Key users

Prerequisites

- Proficiency in office software and teamwork
- Basic knowledge of document management (versions, validation)
- Understanding of access rights principles
- Knowledge of internal processes (projects, quality, support)

Technical requirements

- PC/Mac with at least 8 GB of RAM (16 GB recommended)
- Windows 10/11, macOS, or Linux, recent browser (Chrome/Edge/Firefox)
- Access to an IRIS test environment and user account
- Office suite for handling documents (PDF, Office)

Our training program IRIS: collaborative digital platform

[Day 1 - Morning]

Getting started with IRIS and navigating the workspace

- Understanding the structure: spaces, teams, roles, and access rights
- Setting up your profile, preferences, and notifications
- Identifying key modules: documents, news, directory, tasks, calendar
- Adopting best practices for naming and structuring content
- Hands-on workshop: Logging in, setting up your account, and finding essential information.

[Day 1 - Afternoon]

Collaborate effectively: documents, comments, and approval

- Create, upload, and organize documents (folder structure, metadata, tags)
- Co-editing and commenting: mentions, discussion threads, tracking changes
- Sharing internally: links, targeted access, version control
- Setting up an approval process: proofreading, approval, publication
- Hands-on workshop: Collaboratively create a document and have it approved via a simple workflow.

[Day 2 - Morning]

Managing communication: news, pages, and communities

- Writing and publishing a news item: targeting, formatting, attachments
- Creating informational pages: structure, reusable content, updates
- Using communities/groups: objectives, rules, moderation
- Measuring engagement: views, reactions, comments, best practices for moderation
- Hands-on workshop: Create an “Onboarding” page and publish a news item targeted at a team.

[Day 2 - Afternoon]

Organization and management: tasks, schedule, and research

- Creating and tracking tasks: assignment, deadlines, priorities, statuses
- Planning with the calendar: events, invitations, reminders, and visibility
- Leveraging search: filters, keywords, tags, document search
- Securing and preserving data: best practices for permissions, archiving, and governance
- Hands-on workshop: Set up a mini-action plan (tasks + milestones) and quickly find deliverables using search.

Target Audience

This training is intended for both individuals and companies, large or small, wishing to train their teams in new advanced IT technology or to acquire specific business knowledge or modern methods.

Assessment upon enrollment

The pre-training assessment complies with Qualiopi quality standards. Upon final registration, the learner receives a self-assessment questionnaire that allows us to evaluate their estimated proficiency in various types of technologies, as well as their expectations and personal goals regarding the upcoming training, within the limits imposed by the selected format. This questionnaire also allows us to anticipate certain connection or internal security issues within the company (intra-company or virtual classroom) that could pose challenges for monitoring and ensuring the smooth running of the training session.

Teaching Methods

Practical Course: 60% Practical, 40% Theory. Training materials distributed in digital format to all participants.

Organization

The course alternates between theoretical input from the trainer, supported by examples and reflection sessions, and group work.

Assessment

At the end of the session, a multiple-choice questionnaire is used to verify that the skills have been properly acquired.

Certificate

A certificate will be issued to each trainee who has completed the entire training program.