

*rego*University 2017

Document Management

Your Guide: Joe Almeida, Christi Rice



Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Document Management - Defined
- Common Document Management Solutions
- Open Mic
- Out of the box PPM Document Management
- ITROI docBoss
- Document Management - Rebuilt
- Rego Best Practices
- Summary

Document Management Defined

- Document management is the process of storing, locating, updating, and sharing data for the purpose of workflow progression and business outcomes.
- Centralized sharing and data storage within specific servers help organizations access information efficiently and effectively, along with securing protected data.
- Programs and servers are used in the process of document management. Important metadata is centralized, as opposed to decentralized or difficult to locate.



Common Document Management Solutions



Google



everteam



Open Mic

- What is your corporate document management standard?
 - Is it easy to use?
 - Does everyone use it?
 - Does everyone like it?
- Is it integrated with CA PPM?
 - At what level are you integrated?
- Do you use it for document approval/routing?
 - Is CA PPM part of the process?
- How would you like to see it change?



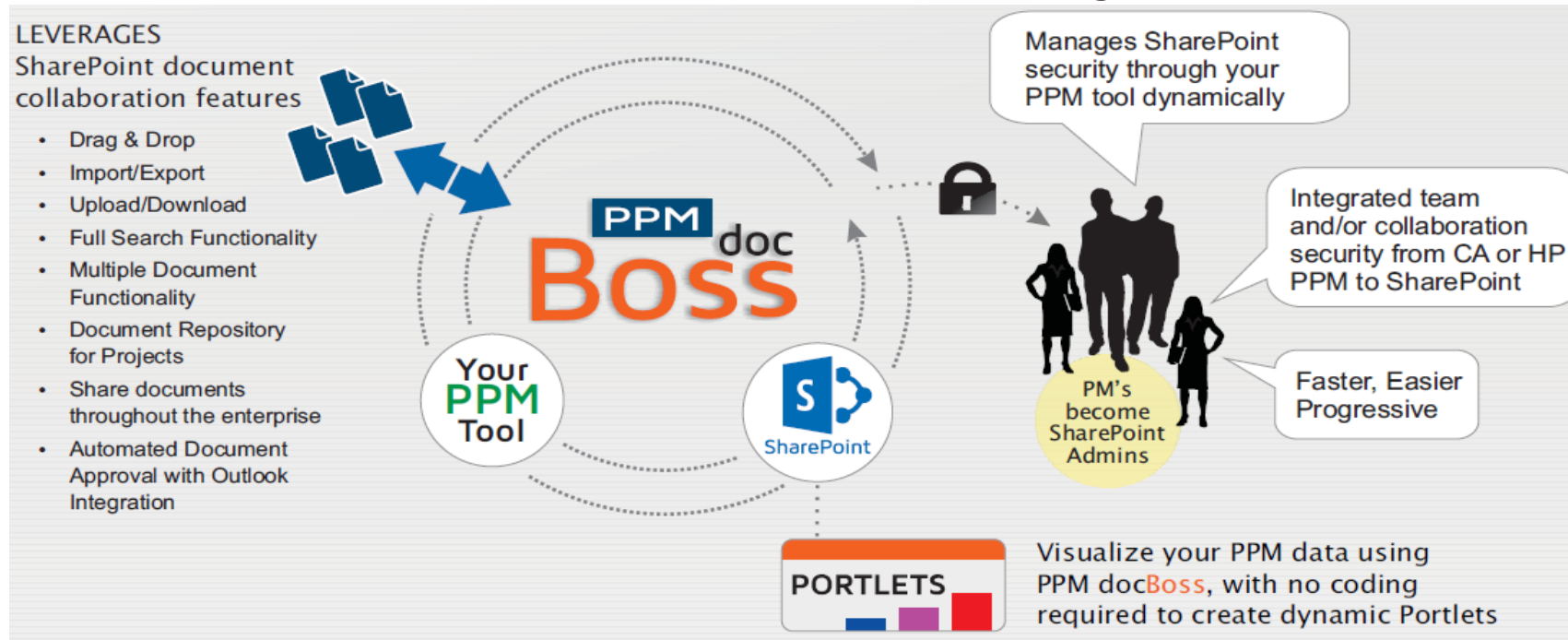
CA PPM Document Management – In a Nutshell

With out-of-the-box document management, users can easily store and share documents. Administrators can secure documents not only by user, group or role, but also by organizational breakdown structure. This ensures that everyone in your enterprise has access to the documents they need, and nothing more. Like most leading document management solutions, CA PPM can do the following:

- **Control document versions**—Users can track who checked out documents and when, track the history of a document and access and manage prior versions of documents.
- **Use powerful search functionality**—It's easy to conduct searches on both structured and unstructured data within documents. Searches return only information the user is authorized to view.
- **Route documents with workflow**—Process management functionality works in conjunction with the document management functionality to route documents for review and approval using standard or customized workflows. This helps your team members worldwide make informed decisions faster, eliminating time-consuming meetings and email exchanges.

ITROI docBoss

- PPM docBoss leverages SharePoint's easy-to-use web interface that directly embeds into your PPM tool. The solution increases user productivity and performance by adding streamlined efficiencies that helps your enterprise realize the full potential of your PPM universe.
- PPM docBoss controls the Project Document Manager, Blogs and Portlets directly through SharePoint, thus taking advantage of SharePoint's collaboration features and allows the creation of dynamic self-help Portlets using live PPM data. It also streamlines the creation and management of SharePoint sites, libraries, and folders, without the need of PM's involving the IT department.



Document Management – Rebuilt

The revised document management focuses on a much more streamlined approach with the following goals in mind:

- **Team Member Project Document Storage**—The focus here being on the team and their ability to upload project documents to a central location with the intention of easily sharing with other users.
- **Quick access vs extensive security**—The new approach removes complex versioning and security in an effort to encourage easy and quick access to project documents.



CONVERSATIONS		
TASKS		
STATUS		
DOCUMENTS		
Documents		
NAME	OWNER	MODIFIED
Staff Preparation	Nicole Fleming	Feb 19, 2017
Customers and Promotions	Nicole Fleming	Feb 19, 2017
Booth set up	Nicole Fleming	Feb 19, 2017

Industry Trade Show

Needs Help

JAN 2, 2017

JAN 31, 2018

CONVERSATIONS

TASKS

STATUS

DOCUMENTS

Documents > Staff Preparation > Derrick's Folder

NAME	OWNER	MODIFIED	SIZE	TAGS
Derricks Trade Show Script.docx	Derrick Joseph	Feb 19, 2017	25KB	SCRIPT

Rego Best Practice

Option 1: URL field linked to an external repository

- Simple attribute field
- Can be user based or hard coded (depending on central or distributed DMS)
- Easy to implement/deploy

Option 2: ITROI docBoss

- Most Flexible solution
- Large number of options around document import/export features
- Most technically complex
- Requires more implementation time/training

Option 3: CA PPM

- Rebuilt Document Management for 15.3
- New look/feel provides a more modern UI
- Simple Document Management with no versioning, security or check out features

Summary

Option 1: URL field linked to an external repository

- Simplest solution requiring minimal effort to deploy

Option 2: ITROI docBoss

- Most technically complex, but provides the most flexibility

Option 3: CA PPM

- Leverage CA PPM's new or existing document management functionality

Questions?



*rego*University 2017

Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com