

## Overview of the eIT PMO

The USAMRMC Enterprise Information Technology (eIT) Project Management Office (PMO) is responsible for providing IT solutions to support medical research at USAMRMC in accordance with DoD/Army/MEDCOM policies and regulations.

The PMO facilitates full program coordination to ensure successful acquisition of required IT solutions to support Food and Drug Administration (FDA) compliance efforts.

The eIT PMO maintains a valid DoD Interim Authority to Operate (IATO).

## EDMS "Hands On" Training Dates

Classes are held in Bldg 844 at Fort Detrick (DCO available by request).

### Basic Functionality Training

Time: 0830-1000

11 February 2015

11 March 2015

08 April 2015

### Manager Training

Time: 1000-1130

11 February 2015

11 March 2015

08 April 2015

### Enterprise Connect Training

Time: 0900-1030

04 February 2015

04 March 2015

22 April 2015

### Enterprise Document Routing WF Training

Time: 0900-1030

18 February 2015

18 March 2015

01 April 2015

Contact eIT PMO Mailbox to schedule:  
[usarmy.detrick.medcom-usamrmc.other.eit-pmo@mail.mil](mailto:usarmy.detrick.medcom-usamrmc.other.eit-pmo@mail.mil)



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## In the Spotlight...

### The EDMS Enterprise Document Routing Workflow is LIVE and is being Used!!!

Released in November 2014, the EDMS Enterprise Document Routing Workflow (WF) allows EDMS users to initiate their own automated workflow to route a document for review, approval, and/or signature; reducing the need to send large email attachments. The workflow provides automated notification of assignments, tracking, status, version control, and audit trails.

To access the Enterprise Document Routing WF, click on EDMS Enterprise Tools, located in the Featured Area in the Enterprise Workspace. Click on the folder, EDMS Enterprise Document Routing WF. Here, users will find a Document Routing Help folder containing WF Training and

a User Guide. A link to Help<sup>1</sup> is provided in every screen within the workflow. A My Workflows in Motion Report is also located in the folder (see report example on pg. 2).

To initiate a WF, click on Route a Document for Review, Approval, and/or Signature. The Initiator will complete the initial form, providing the WF Name<sup>2</sup> and optional fields including Due Date<sup>3</sup> and Instructions<sup>4</sup> for the participants. The Initiator will attach a document or document package for review, approval, and/or signature<sup>5</sup>. One or more of the cycles will be chosen (Review/Approval/Signature)<sup>6</sup> and each may be repeated as many times as needed. The routing can take place concurrently<sup>7</sup> or sequentially<sup>8</sup> and each cycle may be different. The Initiator will assign participants for each cycle chosen<sup>9</sup>. When the WF is complete, the Initiator will specify where to store documents in EDMS.

#### Document Review, Approval and/or Signature Workflow Instructions

- Complete the form below.
- Select either a Review, Approval, and/or Signature Type: **Concurrent** - sends the documents to ALL staff at the same time during each cycle; **Sequential** - sends the document to each staff member in the order entered for each cycle. Note: You must select at least 1 cycle to begin the workflow.
- Click **Display/Add Attachments** to add items to be reviewed/approved and/or signed. NOTE: It is recommended that you set "track changes" within your document(s) to facilitate review.
- When all documents have been added, close the Attachments window by clicking the 'X' in the upper right hand corner of the window.
- Choose the Reviewers, Approvers, and Signers for each cycle by clicking the "head" icon beside each reviewer/approver and/or signer number. Note: Click the "Need More" to display additional assignee fields.
- When you are ready to initiate the process, click **Submit** to begin the process.

Workflow Name (required): <b>2</b>	Review and Edit the January Newsletter	Due Date: <b>3</b>	31 January 2015
Instructions: <b>4</b>	Review the draft and provide edits using track changes. Use the Comments Field for formatting suggestions.		
Routing Type (select one or more): <b>6</b>	Review Type: Concurrent and/or	Approval Type: Concurrent and/or	Signature Type: Sequential <b>8</b>
POC Information:	Name: Joe Trainer	Email: joe.trainer.civ@mail.mil	Phone: xxx.xxx.xxx
Document Type/Description: (optional)	QA Reviewer (optional): joe.qareviewer <b>9</b>	Final QA Reviewer (optional):	
Will you have QA Review after the Review Cycle or Final QA after the Approval Cycle (if so, select Reviewer by clicking the "head" icon)			
Reviewers: <b>9</b>	Approvers: <b>9</b>	Signers: <b>9</b>	
1. joe.reviewer <b>9</b>	1. joe.approver <b>9</b>	1. joe.signer <b>9</b>	
2. jill.reviewer <b>9</b>	2. jill.approver <b>9</b>	2. jill.signer <b>9</b>	
3. <b>9</b>	3. <b>9</b>	3. <b>9</b>	
4. <b>9</b>	4. <b>9</b>	4. <b>9</b>	
5. <b>9</b>	5. <b>9</b>	5. <b>9</b>	
Submit	Reset	Display/Add Attachments	Help <b>1</b>



## Technology Solutions for Medical Research

As shown in the sample below, the My Workflows in Motion Report provides the user with the ability to view the progress of the WFs they've initiated—while the WF is moving thru the assigned cycles. The Initiator can view Attachments<sup>1</sup> associated with the WF, view Comments<sup>2</sup>, and Stop a WF in progress<sup>3</sup>. Each column name may be clicked for sorting. The comments open in a separate screen and include the name of the Reviewer/Approver, the associated comments, and the date that it was submitted. The attachments also open in a separate window allowing the Initiator to view the changes being made to the WF documents as

they move thru the workflow cycles.

We are now offering Document Routing Workflow training for you and your organization (**Note:** We strongly recommend completing EDMS Basic Functionality Training prior to initiating or participating in an EDMS WF). See our monthly training schedule on pg. 1, or contact the eIT PMO to schedule a group or one-on-one training at: [usarmy.detrick.medcom-usamrmc.other.eit-pmo@mail.mil](mailto:usarmy.detrick.medcom-usamrmc.other.eit-pmo@mail.mil).

Remember, online help is also available in the Doc Routing Help folder and thru the Help link on each screen of the workflow.

My Workflows in Progress - Enterprise Routing Workflow - 1

Workflow Name	Date Initiated	Due Date	Current Step (Days on Task)	Attachments	Show Comments	Stop Workfl
Review and Edit January Newsletter submitted by: Joe Trainer	2015-01-30 04:18 PM	2015-01-31 12:00 AM	Review: Review and Edit January Newsletter submitted by: (0) - joe.trainer	1	2	3

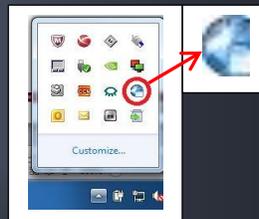
Executed by Joe Trainer (joe.trainer) on Jan 30 2015

### TIPS & TRICKS

#### Wait a Minute!! What Happened? Where are My Document Edits??! Managing Local Document Conflicts

Many of our EDMS users choose to utilize an EDMS 'Add-On' that we offer called **Enterprise Connect**. Enterprise Connect is not a separate system—it *is* EDMS—but it has the look and feel of Windows Explorer. The nice thing is that even though it has that familiar 'look' we are used to, you still have the functionality EDMS has to offer—and you can perform bulk uploads and edit online! Sounds perfect! Except when you get that unexpected network 'blip'... Sometimes you don't even know it happened. What you *do* notice is that the edits you performed aren't showing up in the EDMS Web Browser! What do you do now?

- ❖ When you open a document for editing from the server, a copy of the document is stored on your computer in the local document cache.
- ❖ A conflict occurs between your local document and the server if the connection is broken.
- ❖ To resolve, click the arrow to reveal the task bar menu and click the Office Editor icon (illustrated at right).
- ❖ Click Show Pending at the top left of the Manage Local Documents Dialog Box.
- ❖ Locate your document. If no one has reserved the item for editing, or added a version since your conflict occurred, you can highlight the item and click Synchronize to upload your document edits to the server as a new version.
- ❖ If you are collaborating on the document, and others have added edits/versions, open a Read-Only of your local document and save it to your workstation. Now Highlight the item in your Manage Local Documents list and click Discard to remove it from your local cache.
- ❖ Reserve the most recent version of the item in EDMS and manually insert your edits and save a version.



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## Product Updates

### Medical Dictionaries

WHO Drug Dictionary update will be released 1 March 2015.

## Future Capabilities

### CAC Login to EDMS!

In the coming months, the current EDMS production system will allow AMEDD issued CAC card holders to login using their CAC card and associated pin. All other users will continue to login as they do today, with username and password. The current login page will be modified to allow the user to select the appropriate login method.

The capability will be rolled out via a phased approach, one command at a time, over a period of several weeks. Users within each command will be notified prior to roll-out.

This is the first step of a larger system upgrade to EDMS. Scheduled to be completed by the end of FY15, the current system will be upgraded to a new release with an updated look and feel and some new features. For example, all CAC card users, such as Navy CAC holders, will be able to login with their CAC. More info on this new release in our next issue.

## Want More?

If you and/or your organization are interested in learning more about the IT capabilities offered by the eIT PMO, we will be happy to meet with you!

Contact the eIT PMO at: [usarmy.detrick.medcom-usamrmc.other.eit-pmo@mail.mil](mailto:usarmy.detrick.medcom-usamrmc.other.eit-pmo@mail.mil)