

# Carr, Riggs & Ingram, LLC streamlines communication with PMG iCollaborate Portal Platform

## About Carr, Riggs & Ingram

Enterprise, AL-based Carr, Riggs & Ingram, LLP (CRI) is a leading Southeastern regional accounting and business consulting firm operating twelve offices in Alabama, Florida and Mississippi. Offering a wide range of services to a variety of industries, Carr, Riggs & Ingram was ranked 42nd in the 2004 Public Accounting Report's "Top 100 Firms in the Nation" and fourth in the Southeast region.

### The Problem

In January 2003, CRI executives realized a need for improving communications among company professionals, administrative staff and business partners. Top priority was given to technology projects: design of a more flexible public Website, with dynamic content management, and design of an employee Intranet and client Extranet, allowing timely sharing of general operating information, policies, shared resources, documents and reports.

The key decision factors in vendor selection and project planning were cost and time. The project management team had only eleven months from time of conceptual design to portal launch. The project budget was finite, and in-house technical resources were limited. The project began with the project management team launching a broad, four-month search for an outsourcing partner that could quickly and successfully engineer a complete solution. Key design factors required the systems to allow non-technical staff to make direct and timely updates to the portal without incurring maintenance expenses and time delays waiting for technical resources.

### The Solution

After reviewing PMG iCollaborate, the company selected PMG.net as the engineering lead for the project. PMG iCollaborate is a highly configurable application with secure, roles-based administrative features and a robust, dynamic content management system. Meeting project time and budget targets, PMG leveraged the flexible structure of the CRI portal to engineer customized administrative and content templates, a full site search, client and employee databases, dynamic forms and calendars and discussion forums. While CRI led design of the graphical user interface, design of information architect and site process and workflow, PMG managed integration of the front-end information architecture and HTML design.

In only four months, the portal was launched with hosting at the PMG data center. PMG delivered a full set of user guides customized for both site administrators and site users. PMG now provides hosting and access for portal reports; usage and click stream statistics.

### Real Results

Because PMG solutions are so easy to use, maintain and update, many CRI employees have been trained to maintain the CRI portal content. As use of the portal increases, additional customized features are being incorporated into the design. The portal, which at launch in 2003 served broad, firm-wide communication needs, is now serving the more specialized needs of each CRI office location. Intranet use is on the rise with 85% of the employee base accessing the system each month.

The public Website for Carr, Riggs & Ingram can be found at [www.cricpa.com](http://www.cricpa.com).



**System Features Include:**

- Industry standard, XML-based data storage for maximum flexibility
- Complete version control with audit and roll back capabilities
- Federated search across all content, data, documents and enterprise resources
- Flexible User Interface utilizing Cascading Style Sheets (CSS) and Extensible Stylesheet Language (XSL) to support virtually any customized "look and feel," layout format or navigation model
- Simple, powerful content creation and management features— add, edit, delete, move, and secure content
- Support for links and multiple file attachment formats within content (including images, documents, audio/video clips, etc.)
- Content templates to enable the creation of "Dynamic Forms" for the collection and distribution of data submissions and file uploads
- Content templates to support task status management, with e-mail notifications
- Calendar module to support events management
- Auto-publish and auto-expire dates for content (Post/Remove Dates)
- Version Control - file and content locking for simultaneous editing control
- Content Search / Document Search - keyword, phrase, and substring (content search within only those areas for which the user has been granted access rights)
- Support for content publishing to wireless devices (Windows CE, Palm)
- Integration points for mobile workforce wireless device content synchronization

**Real results: increased collaboration, consistency, efficiency and security**

By implementing PMG iCollaborate across the enterprise, you can realize both short-term and long-term results.


**Robust user permission system**

Through a robust user permission system, Web content development and management responsibilities can be distributed as needed throughout an organization, while ensuring consistent display presentation and usability. The system supports multiple user levels, ranging from read-only rights to full system administrative access, and offers 23 separate permission rights that can be configured to accommodate any specific, desired user security role.

**Rapid deployment of content and workflow applications**

Because all portal content, whether static or dynamic form-based, is maintained through simple, intuitive administrative interfaces, authorized users are able to rapidly develop and launch their own content or even workflow applications, without having to rely on internal or external IT resources.

**Task management support for better project management**

In addition to its distributed content publishing and dynamic form capabilities, PMG iCollaborate also supports task management within content to facilitate project management, and offers a corporate calendar feature for events management, further enabling an organization to manage its people, processes and information from a single, centralized location. 

*A recent study conducted by Line56 Research reported that 73.3 percent of IT executives would prefer a single, cross-enterprise infrastructure for on-line information management and delivery.*

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