

*Case study*

CCH Document Management Condies

Condies is a progressive eight partner accountancy practice with offices in Dunfermline and Edinburgh. The firm was established in the 1920s and now has an extensive and varied client base throughout Scotland. Partner, George Primrose, describes the three big benefits that he has seen since the firm implemented CCH Document Management.

“We’ve been a ‘less-paper’ practice for around ten years now. The initial driver was simply the amount of space that paper documents were taking up. It got to the stage where we considered converting some of our outbuildings for storage; I was sure we could find a more efficient, and permanent, solution to the problem.

We started by using the document management features built into CCH ProCost (a Wolters Kluwer practice management system). This gave us a basic filing system for internally created documents and scans of incoming correspondence.

As far as it went, this worked well enough but CCH Document Management - which we implemented in August 2008 - offers a number of significant benefits because it’s a purpose built document management system.

Firstly, there’s proper support for emails so we can now keep control of everything in one place - emails, incoming paper correspondence and any documents or files that we create. Under ProCost you could only store emails by printing them off and scanning them in, but CCH Document Management gives access to the originals, automatically stored as a softcopy. Over the years more and more clients have started to communicate by email, so this feature is vital.

The second major improvement is that scans are stored as PDF files rather than just images of the scanned documents, which means you can search them.

That brings us to the third major improvement: the search facilities are much more sophisticated, making it easier to find exactly what you want.

Because we’ve been committed to a less-paper approach for so long, it’s difficult to quantify the gains we’ve made, but staff definitely spend less time searching for the correct paperwork than they used to. You can find a document and bring it up on screen almost instantly - try doing that with a paper file! The software is easy to use and new staff pick it up pretty quickly.

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Another major advantage is version control. With CCH Document Management you can be sure you've always got the latest version of a document. Because people have to check out and check in the documents when they want to edit them, you also know that any changes you make will not be overwritten by someone else. If you need to take a copy of a document to a client, you can just download it to your laptop.

Right from the outset we decided not to scan historical documents. For the number of times we would need them, we didn't believe we could justify the time it would take to put them on the system. We've not regretted this decision. We do an annual cull to eliminate what we can and, as time passes, we need to keep fewer and fewer of the old paper records. Eventually we will have freed up two or three rooms, which will be useful extra office space.

Because we also use other Wolters Kluwer software - for tax and practice management - we're looking forward to having everything running under CCH Central. Features like the automatic filing of incoming emails based on the sender's email address will make document management even easier in the future."

George Primrose
Partner

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cchsoftware@wolterskluwer.co.uk