

echive[®] at Work

echive[®] Adds Up to Efficiency for an Accounting Firm

History

Accounting firms typically manage both company and individual accounting needs. This particular company provides a wide range of services from estate planning, business consulting, and investment review to traditional accounting such as bookkeeping, audits, and tax preparation.

Problem

As a multi-faceted business, it both generated and received reams of important paperwork from their client relationships. Correspondence, memo's, self-generated tax returns from many different tax software programs, handwritten work papers and official tax forms and returns resulted in extensive filing. Logically, they used the traditional and proven manila file folder method. However, they knew there had to be a better way. Accurate document location was becoming a true time waster.

Solution

Inception Technologies, an Open Archive signed reseller, presented a document management solution for organizing their many different types of files and forms. With an office scanner and echive document management software, Inception Technologies installed an efficient and expandable system for tracking, locating, viewing, and printing these important papers.

The contents of each file folder were scanned and properties indexed using an office scanner and echive TIFIndexer. Indexing fills in a value for customizable property fields (such as client name, year, partner's name, and document type – correspondence, tax return, etc.). All documents can be sorted and searched for based on these property fields. Sorting on property fields is similar to using MS Windows Explorer. Full text indexing is then applied to each document; this allows searching for any word or combination of words.

Scanned files, with the indexed information, were easily imported into echive Organizer, an industry standard database application. Organizer contains comprehensive database functionality with tools for searching, viewing, printing and distributing many different types of files. An entire database or just selected files can be published to CD/DVD for archiving or delivery. Or a database or database subset can be distributed over the Internet.

echive Explorer, the desktop component, gives company employees extensive search capability for locating client information based on property fields or any word or combination of words. Documents are easily viewed inside Explorer or sent to their native application. Tedious filing and time wasted searching for misfiled client information is past history.

Managing many different document formats and maintaining accurate and easily accessible client records enhances the full service relationships that this accounting firm is committed to.

About Open Archive Systems, Inc.

Open Archive Systems, Inc. is a leading document management software developer. Solutions for documents and drawings include scanning, distribution, enterprise viewing, raster and hybrid editing, raster to vector conversion, and full conversion to CAD. Products include echive, GTX, Spicer, Myriad, Cyco, Context, and Vidar.



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