

New capture solution for major US Accounting Firm causing minimal issues for iManage users



“Accountancy is a virtual industry, but there is still a paper component and a need to transfer vital documents and emails from one system to another, so a scanning solution is a key element of the whole operation”.

Senior IT Project Manager

Background

With over 80 offices and 9,000 staff across the United States, our client is one of the largest accounting/ taxation firms in the US. They have been providing assurance, accounting, tax, business consulting and wealth management services to their clients for nearly 100 years and continue to grow.

The Challenge

The existing solution utilised FileSite from iManage to create, manage and collaborate on documents and emails from anywhere, on any device – allowing users to increase productivity, work smarter and make better decisions. AccuRoute

from OmTool handled all of the background processing.

However, due to the fact that AccuRoute is a decentralised product, a server was required in every site location (over 80 offices), which was proving to be an expensive setup.

Finally, as their licensing model was not conducive to the number of existing users and the lack of technical support, the company started investigating alternative solutions.

They wanted to maintain their same functionality with minimal changes to the user’s processes, so there would be little need

for retraining or downtime, so users could still have immediate access to emails and document attachments side-by-side with other work product, boosting efficiency and saving valuable time.

The requirement for change was quite urgent because the annual Maintenance licenses were due for imminent renewal. Our client needed to find a provider that could give them exceptional service in a short timeframe. At this critical junction, they received a recommendation for EzeScan by a trusted vendor.

How it worked

Near the close of the tax year all US offices find themselves scanning a large number of documents that must be stored to the correct file location quickly and easily. All scanned documents are stored in iManage's leading document and email management system for today's modern professional, enabling users to be more productive and making it easier than ever for them to collaborate with team members and stakeholders in a secure and governed manner.

Metadata is applied to all stored items, which is unique to each individual client to enable easy retrieval. At the front end, users upload documents directly into the iManage solution, which is integrated into Outlook.

When a new document arrives for processing, they simply click into the correct folder and find the relevant client data. When it is saved it creates a barcode cover sheet, which they print, and put on top of the stack of documents to be scanned. Once

the scan has happened, the placeholder is then replaced by the scanned file. So the task for EzeScan was to recreate this process as closely as possible.

The Solution

EzeScan created a process that not only matched the existing process but also simplified it by giving the user an extra option to proceed straight to creating a barcode without having to first create a placeholder document within iManage, removing additional steps and making it a smoother process.

As a first step, the company now uses the EzeScan WebApps component leveraged within iManage to generate the barcode coversheet. The user just needs to enter a file name and the other fields are inherited to the location & client that they are scanning to, all auto populated by EzeScan talking to iManage as a background process.

Taking out the placeholder step means the process is more refined, much more simple to use and most importantly, much faster.

The EzeScan generated Barcode Coversheets placed on top of the various documents on premise centralised EzeScan

Server which automatically handles the interaction and automatic uploading to iManage by reading the barcode data, pulling in the data from a network location and processing it – the user just needs to create their initial barcode coversheet and then scan... that's it. Multiple documents can be batched and then processed, images can be

scanned via dedicated desktop scanners or any MFD type copier within the organisation.

Two EzeScan production Web-Servers and two DR EzeScan Servers are in place to make sure they have cover in case anything happens to what's being used in production. These four servers are centralised and have replaced all of the local 80 servers which were previously used with the AccuRoute solution. The reduction in the amount of servers being used and the amount of time required for support produced an instant ROI before adding in the benefit of enhancing and simplifying the capture process.

How the process works

Due to the complexity of the industry, the process was required to be broken down into two different workflow types for processing. The majority of documents are one type of file which follow the standard EzeScan process – capture the image with a Barcode coversheet, OCR the document, convert it to a text searchable PDF, read the metadata to determine where it is going and then upload to iManage. EzeScan also deletes the local file automatically once iManage confirms the upload is complete, another strong user-friendly feature.

However, they also use a one other file process for certain types of complex documents which means that instead of using the standard EzeScan process, they are processed by a separate PDF builder solution which sets up the document differently accordingly to the special requirements, which then



generates a different process for reporting purposes. When the document comes out of that process EzeScan simply picks it up without needing to do any OCR or file conversion, so just reads the EzeScan generated barcode and files it securely within iManage.

Implementation

Initially the EzeScan solution didn't quite do everything they needed it to do in order to replicate the old solution, therefore EzeScan need to develop some additional functionality. EzeScan prides itself on listening to its customer's needs.

The project started with a pilot implementation with 10% of the offices, in order to perfect the solution before rolling it out across all offices. During the pilot, the organisation had nothing but positive feedback and users felt there were less steps and it was not as clunky than the previous solution. There were very minimal changes required, it all just worked and most importantly didn't have any negative impact on the users.

From an IT support perspective EzeScan's much simpler licensing model also suited the client, so overall everything came

together very quickly, it was a very successful pilot project for everyone and lasted less than 30 days.

All set up and configuration was easy enough to be carried out remotely in conjunction with the organisation's IT teams so they were all fully trained to handle issues and replicate the process to do it internally as they rolled out the EzeScan solution to a new location.

During implementation of the production environment, EzeScan's development team added more enhancements to ensure the client was given exactly what was required- the benefit of EzeScan's internal support and R&D team means they can be very flexible and react quickly.

An added advantage for all EzeScan users is that any new features are released in one version update for all customers to use.

Support

Going forward, the ability to have the EzeScan solution centralised is a big help for them as the client no longer needs to update all the individual servers in 80 locations, just one more powerful but less demanding central set up.

Direct integration to iManage was also really important as they are already using iManage solutions, so professional users are familiar with its user-friendly, intuitive interface, increasing productivity to deliver their best client work. It was also a benefit that it was future proofed and that any future upgrades, such as to iManage Work 10, the newest

version of its leading document and email management application could be also handled via the EzeScan connectors.

Support on the Windows platform has also been improved with less compatibility issues and when they are ready to go to the next level with Windows they know EzeScan is already compatible which also makes things simple.

The Results

The Senior IT Project Manager commented "The lack of feedback from end users has been great as in this case, no news is good news. We've had very few complaints and the smooth transition has been a huge perk for us which means the rest of the roll out will be much easier.

The only change users experienced is a positive one, as they no longer need to create

a place holder document first within iManage, otherwise the process is exactly the same- they just log on with their windows user name and password and use Outlook like they did before.

We have received exceptional service, EzeScan has been patient and extremely knowledgeable technically on both the capture side as well as with iManage. They provide candid feedback when it is needed and they made the hiccups just hiccups rather than major obstacles and they have really taken the time to educate us, which was all great.

A significant financial saving has been achieved over the previous solution which was very high priced, clunky and with bad service so all round it has been a positive move.

With EzeScan, the price is reasonable, it may not be the cheapest but the solution itself

is worth the price – this is where our big return on investment comes.

The users are happy and from a commercial perspective we license the solution in a way that makes sense for our business, as previously it was a one price fits all solution which was just not realistic as all business are set up and operate differently. So the ability to tailor the licensing was a big plus and also the ease of use the system and the support we've had implementing it has beyond paid for itself.

The pilot program has gone really well and enabled us to do some performance testing so we are now fully ready to roll it out to the remaining offices."

FOOTNOTE: Since publishing, the full rollout has expanded to the remaining 70 locations and occurred with no hiccups or notable issues.

EzeScan is fully compatible with all Version 9.xx & 10.xx versions on iManage, both on-premise or in the cloud. Please go to www.ezescan.com to register for your free trial version.

Australia

T: 1300 EZESCAN (1300 393 722)
E: sales@ezescan.com.au
W: www.ezescan.com.au

UK

T: +44 20 3535 0645
E: sales@ezescan.co.uk
W: www.ezescan.co.uk

USA

T: +1 (323) 443 0022
E: sales@ezescan.com
W: www.ezescan.com