

Document Management



Information

Fee Protection

Software

Magazines

Professional Development

...clear thinking



Document Management – the challenges

In recent years the tide of paper, electronic documents and email has threatened to overwhelm accounting practices. Staff spend more time than ever filing and retrieving paper, printing documents and handling emails.

As regulation increases, the need for stringent internal procedures and good quality record keeping has never been higher, but staff struggle under a daily deluge of information, chasing documents when they should be generating income for the practice.

Document Management – the solution

CCH Document Management meets these challenges with a range of innovative features:

Deal with the three main sources of information

By integrating the three main sources of information within the practice – paper documents, files stored on the network and outgoing and incoming emails – CCH Document Management provides a complete solution to managing information within the practice.

Search and find documents easily

Smart scanning and indexing make paper documents as easy to retrieve and use as electronic ones. Comprehensive search options allow staff to find and use stored documents and emails quickly and easily.

Get instant access to the documents you need

Being out of the office no longer means being out of touch. Whether you're on the road, on a client's site or working from home, documents and emails are all still instantly available.

Share documents with your clients

The Client Portal allows you to share information securely with your clients, delivering a complete document management solution, both within and outside the practice.

Maximise practice efficiency

CCH Document Management has been developed specifically for accounting practices. By encouraging collaboration, reducing administration and speeding the flow of work, it can significantly enhance practice efficiency.

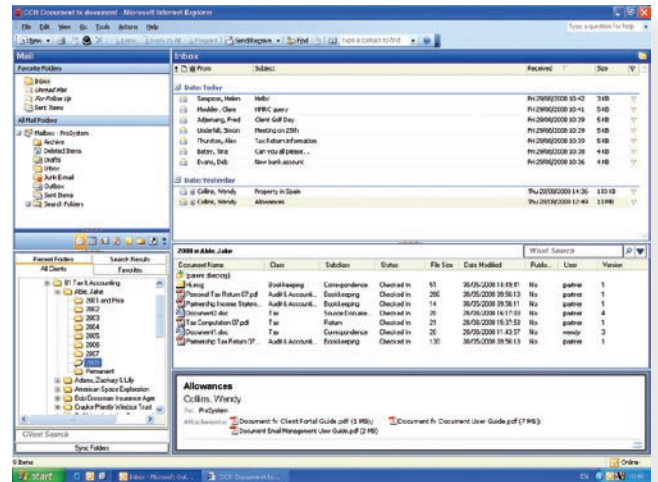
Protect the security of all stored information

User logons, audit trails and secure storage help protect practice and client information, enhancing the legal admissibility of documents and providing protection from the threat of litigation.

CCH Document Management – key features at a glance

Integrate information sources within the practice

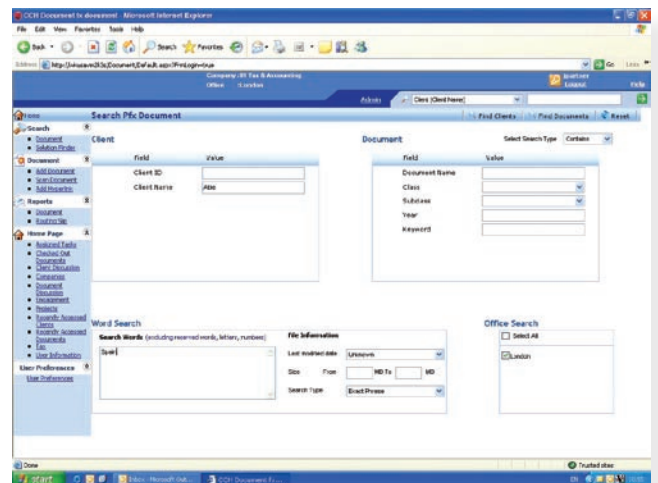
- Integration** – CCH Document Management brings together the three main sources of information within a practice – paper documents, files on the network and emails – so that you can find information wherever it comes from.
- Paper documents** – Using the optional CCH Scan module, scanned documents are converted to secure, fully searchable PDF files. PDF files can be reviewed, organised and annotated with the PDFlyer plug-in for Adobe® Acrobat® which has been developed specifically for accounting practices.
- Network files** – Simply drag and drop existing documents into the appropriate client file. Save new documents and other files directly from the Microsoft® Office suite, without even opening the CCH Document Management application.
- Emails** – Get direct access to CCH Document Management functionality from within Microsoft® Outlook. Drag and drop emails directly to the client and add email attachments from CCH Document Management.



Manage emails just as easily as other practice documents

Store, search and retrieve documents with ease

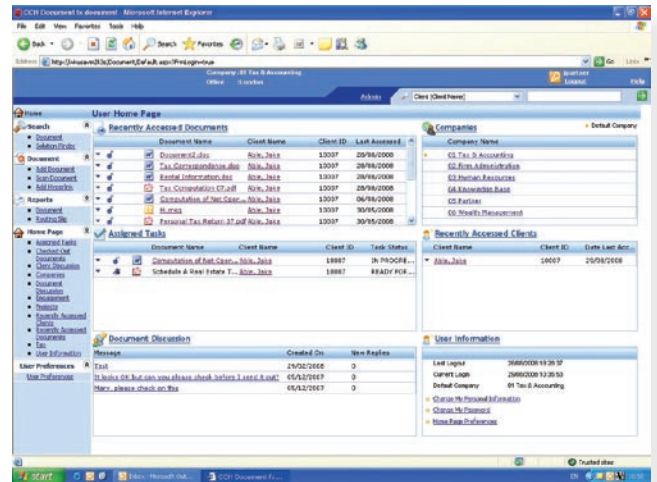
- Keyword search** – Keywords can be added to any document to help categorise and locate it. Drop-down menus make this easy.
- Text search** – Documents can also be located by searching for words within the text. CCH Scan incorporates optical character recognition so that even scanned documents can be found this way.
- Cleaner scans** – Compared to many standalone scanning solutions, CCH Scan produces cleaner scanned images, with automatic straightening, sharper lines, better greyscale reproduction and suppression of blank pages.
- Formats** – Existing electronic documents are stored in their original format; scanned documents are converted to secure and universally recognised PDF files.



Use keywords or full text search to find documents easily

Get instant access to practice documents

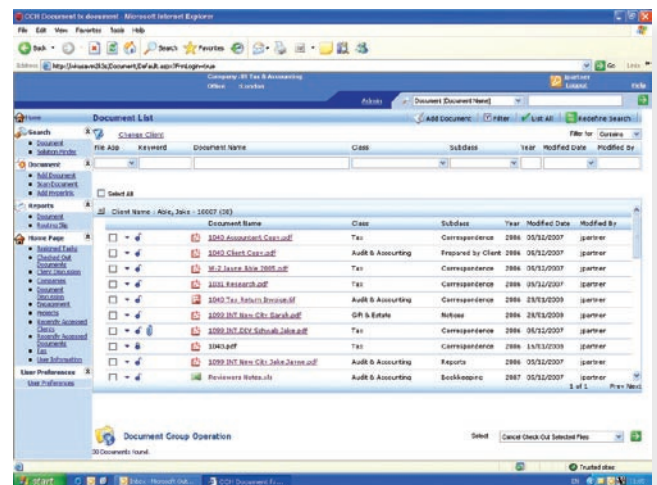
- **Instant access** – Once they've been added to the system, documents and other files can be located and retrieved almost instantly. No more delays for you or your clients.
- **24/7 remote access** – Staff throughout the practice can access documents whenever they need them, from home, onsite or in the office. Ideal for practices with mobile staff or multiple offices.
- **Document sharing** – No need to wait until the single copy of a physical document has been returned to filing. Team members can access the same document simultaneously.
- **Practice documentation** – HR policies and procedures, technical briefings, templates for presentations, client correspondence, source documents and working papers – any document that the practice uses can be stored, found and retrieved.
- **Recent documents** – Your personal home page lists the documents you've recently accessed so you can quickly pick up current work.



Open documents directly from your personal home page

Improve workflow within the practice

- **Designed for you** – CCH Document Management has been designed specifically for accounting practices, so it understands the way that you and your clients work.
- **Collaborative working** – Everyone engaged on a client job has instant, simultaneous access to all client files, no matter where they're working.
- **Customised** – Cabinets and folders can be customised to the way you already work.
- **Expiry dates** – Implement a consistent firm-wide retention policy with automated expiry dates for documents. Meet statutory and recommended retention periods for all documentation.



Apply filters to the document list to find matching documents

Store all files securely

- **Central storage** – Secure centralised storage is inherently safer than having confidential client files on vulnerable laptops. Computerised storage of documents makes disaster recovery plans easier to implement.
- **Secure logons** – Administrators can control rights and define user access to features and files.
- **Audit and history** – CCH Document Management maintains a full audit trail of all stored files and a history of any changes.
- **Document locking** – Documents that have been checked out can be viewed but not changed, preventing potentially conflicting edits.

CCH Client Portal

Reliable, secure access to sensitive documents - anytime, anywhere

Most document management systems only manage documents within the practice. That means they only do half the job. The majority of documents that you deal with either come from, or relate to, your clients, so why not extend document management to your clients?

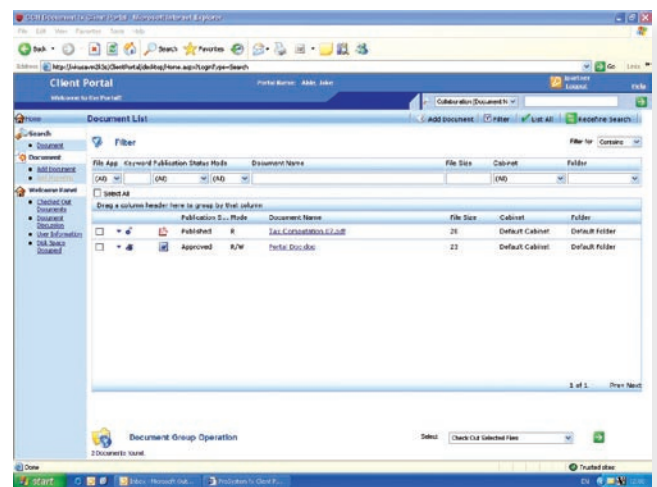
That's exactly what the unique CCH Client Portal allows you to do. Any document within the CCH Document Management system can be made available on a secure Client Portal where it can be retrieved by anyone who has been given access. This allows you to share selected documents safely with your clients, significantly enhancing client communication. Documents in the Client Portal can be designated read-only for greater security and control.

Exchanging information with clients is, of course, a two way process. So, as well as allowing members of the practice to publish documents on the Client Portal, the system allows clients themselves to upload files for instant, two-way information exchange.

Synchronisation and version control mean that everyone always uses the latest copy of every document, while preserving historical changes. When a document is checked out, only the checked out copy can be edited, although authorised users can still view the original.

Partners and other staff can use the Client Portal while on site, so they always have the latest client files. No more bulging briefcases, frantic faxing or expensive couriers.

Clients get better service; the practice works more efficiently. With the CCH Client Portal, everyone benefits from document management.



Share documents with your clients via the secure CCH Client Portal

About CCH

CCH enjoys a unique position within the tax and accounting communities, having provided them with first class business solutions for more than 100 years. In April 2008 Wolters Kluwer established CCH in Ireland by acquiring MYOB Ireland. CCH now services more than 3,000 professional firms of all sizes across Ireland and the UK, from sole practitioners to most of the top 100 accounting practices.

A wide variety of products and services are available – from software, professional development programmes and fee protection services to training and consultancy, reference books, CDs and online information.

Whether you're looking to build client relationships, improve your firm's profitability, develop new revenue streams or reinvigorate your business processes, CCH have solutions that can help.

The CCH ProSystem Suite

Central

The core products within the CCH ProSystem Suite work within CCH Central.

CCH Central provides a single point of entry for data, and enables cross-product reporting and data mining. Personalised home pages allow individuals to bring together all the information they need on a single screen.

Practice Management

CCH Practice Management helps partners and practice managers organise staff resources and maximise chargeable time. The software supports multiple offices and remote data entry and enquiry for staff working offsite.

Document Management

CCH Document Management stores and manages the full range of documents used by an accounting practice, giving 24/7 remote access to client files. Sophisticated search options and integration with Microsoft Outlook make it easy to find and use any item of client correspondence.

Audit Automation

CCH Audit Automation automates the process of conducting an audit, minimising risk, enforcing standards and reducing costs. Paperless working allows tasks to be divided easily between staff.

Tax

Through market-leading tax applications, CCH provides an integrated solution to tax administration and planning for individuals and companies, together with a company secretarial function.

■ CCH Personal Tax IE ■ CCH Corporation Tax IE

Accounts Production

CCH Accounts Production turns raw accounting data into finished statutory accounts quickly and cost effectively. Regularly updated accounts formats are available for a wide range of entities, including sole traders, partnerships and limited companies.

Want to know more?

For more information about CCH Document Management or any of the other CCH products and services:

- Call us on 01 460 4718
- Send an email to info@wolterskluwer.ie
- Visit www.ie.cch.com