➜ Document Management is now a doddle for Dodd & Co.

Accountants and tax advisors, Dodd & Co, converted their legacy paper mountain into electronic format and now store it in an OpenText Alchemy document repository. Archived insolvency, payroll, audit information, etc, is now easy to find and share via the desktop, should it ever be needed for evidence-based verification.

Preparing accounts so they can be understood

Dodd & Co are Chartered Accountants and tax advisors based in Cumbria. Their approach to accounting is 'let's make it simple'.

Advisors are industry specialised. They are therefore able to appreciate the exigencies of their particular specialisation, such as farming or medical accounting, and the statutory regulations which affect their clients' business; advising them using familiar terminology they can understand and preparing end of year accounts that really show what is going on.

Taking care of financial information

Statutory regulations state that financial information must be retained for a minimum of six years. Should a closed insolvency case or tax investigation be re-opened for any reason, it is essential that proof of diligence can be produced.
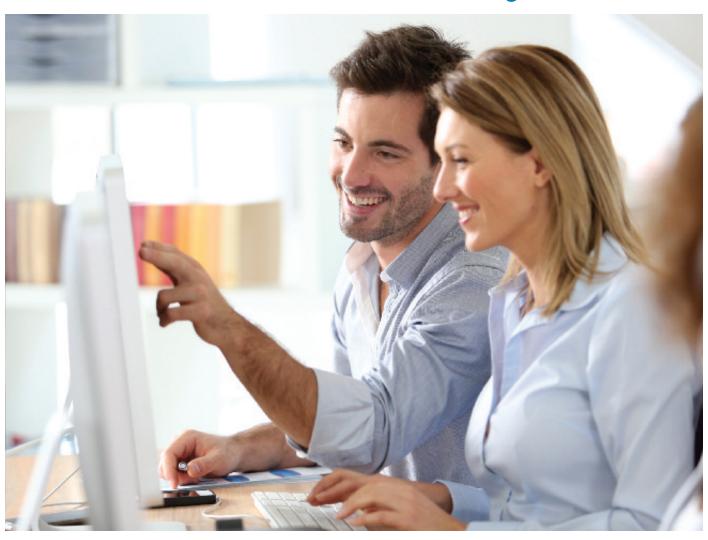
Cases are closed and clients move and take their business elsewhere, so case files are regularly consigned to archive. The result was offices jam-packed with boxes and an outbuilding bursting at the seams with dusty files.

Paper files are also a fire risk and if the worst did happen, the information would be lost.

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Too much paper = inefficiency, plus time and money wasted

It took a lot of time to locate an archived document. This was frustrating for staff and inefficient for the business. Getting rid of the paper would save time and improve efficiency. It would also allow the business to reclaim office space and storage areas currently taken up by archived files.

ProcessFlows supplied Dodd & Co with an Alchemy Document Management solution

Alchemy creates a secure, digital filing cabinet for all Dodd & Co's archived paper documentation. The Alchemy system is stand-alone, acting solely as an electronic alternative, in this instance, to the manual archive filing system.

Dodd & Co's Alchemy server is located in the Carlisle office. It is linked with a dedicated line to other office locations, enabling the firm to maintain a centralised, archive document storage capability which can be accessed by staff through their Citrix environment, from any web-enabled device.

Scan to archive

Dodd & Co set out to scan their entire paper mountain into electronic images so they could be indexed and filed within the Alchemy repository.

"Our archived documents are now safely stored within Alchemy and the information is securely backed-up. We have archived almost 6,000 client files. The relating accounts database contains 65GB of information alone, which gives a scale to the task. Archive information is easily available to be called upon for evidence based verification if the need ever arises and as Alchemy is fully compliant with FSA regulations, we know that we are carrying no risk for our clients."

Michael Clarke, IT Manager at Dodd & Co.

Easy retrieval and filing of current archived documents from the desktop

Documents stored within Alchemy can be searched for by client name, date or keyword. Staff are able to consign a recently closed case file to the Alchemy archive themselves. Paper documents can be scanned from any desktop location.

Any associated electronic payroll correspondence, which is held within the line of business system, is also stored within the Alchemy archive; keeping everything in one place.

Results

- The paper mountain has been shredded
- Documents can be found / consigned easily and quickly from / to the Alchemy archive
- Risk has been reduced
- Documents are secure
- Compliance is met
- Storage space has been liberated.

➜ For more information, please email **sales@processflows.co.uk** or contact
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