



finance

CHALLENGE

- Information contained in decentralized, unstructured documents
- Version control and incomplete files

SOLUTION

- Fujitsu scanners
- Laserfiche document management repository and Laserfiche Advanced Audit Trail
- IKON Professional Services

RESULTS

- Single centralized repository saves on document storage space requirements
- Employees manage document repositories from workstations
- Increased effectiveness — easy document retrieval

Canadian Institute of Chartered Accountants

CICA Counts on Document Management

ABOUT THE CUSTOMER

The Canadian Institute of Chartered Accountants (CICA), together with the provincial, territorial and Bermuda Institutes/Ordre of Chartered Accountants, represents a membership of approximately 71,000 CAs and 9,500 students in Canada and Bermuda. The CICA conducts research into current business issues and supports the setting of accounting, auditing and assurance standards for business, not-for-profit organizations and government. It issues guidance on control and governance, publishes professional literature, develops continuing education programs and represents the CA profession nationally and internationally.

CHALLENGE

As an organization concerned with the secure and efficient management of information, and acknowledging that an enormous portion of their information was contained in decentralized, unstructured documents, the CICA contacted IKON Office Solutions to discuss document management alternatives. The CICA Standards department manages approximately 120 committees that set financial reporting standards for all economic activity in Canada, including standards for corporations, not-for-profit entities and governments.

The formal nature of the committee meetings necessitates the careful management of large amounts of information in the form of research, reasoning, conclusions and decisions, which were kept in hard copy binders and filing cabinets or in shared drives and email archives. However, at any given time and for any particular document, there was no way of knowing if the latest version was on file or even if all the information pertaining to a case or project was actually in the file. Consequently, hours were spent looking for information or double-checking that files were complete.

CICA

SOLUTION

After meeting with the CICA and collecting their requirements, IKON proposed an electronic document management solution. The solution included three Fujitsu scanners to capture electronic images of new documents coming into the organization and a 20-user Laserfiche document management repository to catalogue and store the documents for fast retrieval. Another component was the Laserfiche Advanced Audit Trail, which tracks activity and provides a detailed report of everything that happens to every document from creation to disposition. "The solution was implemented easily and was up and running quickly," said George Greer, CICA Director of Information Technology. "The key objectives of the solution were to help us find information quickly and easily and share knowledge more effectively," said Greer. "Now we can instantly find the information we need for a meeting or discussion. We no longer waste time searching for information, nor do we have to break and reconvene after relevant documents have been gathered," he continued. "All the information we need is right there in the system when we need it."

RESULTS

"The benefits of the solution have been manifold," said Greer. "With the digital archive, we have a single centralized repository, instead of a fragmented environment with some documents in a storage room, some in a warehouse and others on someone else's desk. We have also gained long-term document preservation and saved on storage space requirements both in the office and at the warehouse."

Another plus was the high degree of staff acceptance of the new electronic system. "We could emulate our paper filing structure in the electronic system using customizable folders and index fields, so once we had a critical mass of valid information in the system, the move away from paper was quite painless," said Ron Salole, CICA Vice President of Standards. "Now we can manage our document repositories right from our workstations. The solution has increased the effectiveness of the professional staff accessing volumes of documents to find the information they need," he said.

The CICA is so pleased with the performance of the document solution in the Standards department, they have expanded its use to manage contracts, lease agreements and royalties as well as for Human Resources performance reviews and job descriptions. They have also brought their Educational Services group on line for archiving confidential documents, and had IKON manage the back file conversion of past years' documents into electronic format for storage in the new system. In the near future, the Finance department and Member Services will be looking to add workflow capabilities to help manage business processes by integrating it into a new ERP system. "The beauty of a solution like this is, once you have the basic scanning and storage infrastructure in place, it can be utilized for any part of the organization to further increase productivity and improve customer service," said Greer.

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