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EDO Registeraccountants

CHALLENGE

- **To be able to quickly and easily incorporate digital documents into its SQL-based CRM system, Alure**

- **To reduce manual indexing errors**

- **To increase efficiency, to boost productivity and drive an increase in efficiency and competitiveness.**

STRATEGY

- **New Canon MFPs**

- **Nuance eCopy ShareScan and G-DAC connector**

- **Integration with Innolan Alure.**

RESULTS

- **Documents indexed more accurately**

- **Indexing errors reduced**

- **Faster look ups.**

ABOUT EDO

Founded in 1932, EDO Registeraccountants en Belastingadviseurs (EDO) is a professional partnership of registered accountants and tax consultants. It offers a range of services and advice relating to financial, tax and legal matters. The company's 45 employees – comprising accountants, tax advisors, pension advisors, administrators, payroll and secretaries - operate out of two branch offices in Mijdrecht and Rozenburg (Amsterdam-Airport) in The Netherlands.

BUILDING FOR THE FUTURE

Sometimes, the foundations for the future are set by decisions made in the past. When EDO deployed Canon MFPs and Nuance eCopy ShareScan over four years ago, it set in place the basis of a document management solution that has developed and adapted in line with the company's needs, and one that's set to play an equally important role in the company's growth and future. The solution was implemented to help EDO digitise its paper-based documents in order to boost internal productivity and make it easier for staff to quickly access client files and documents. Arjan Kroon, EDO's IT Manager explains: *"Some years back, we had a requirement to move from a paper-based document system to a digital one, so we started scanning documents using eCopy ShareScan." Arjan estimates that in the last four years, EDO has scanned approximately 13,000 documents. "These files were then imported into the Alure CRM," Arjan adds.*

When the time came to review its contract with Canon, the company deployed six new Canon MFPs, procured through Canon reseller, PCI Groep. At the same time, EDO looked at how it could automate the process of manually indexing files, a process which was time consuming and had been prone to error. It realised it could address this problem by extracting more value from its existing investment in Nuance solutions by equipping eCopy ShareScan with the newly available Generic Database Access Connector (G-DAC)

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EDO Registeraccountants Case Study

from Connectyx Software. eCopy ShareScan's flexible, open-platform design, easily facilitates the integration of third-party connectors. In this case, the G-DAC connector enables EDO to easily query its SQL Server database directly from eCopy ShareScan.

Thanks to the connector, the accuracy of the indexing is now assured, and the filing, finding and sharing of documents is quicker and easier. This is because following a look up, the query is then used as the scanned document's filename. To complete the filing process, Alure processes and automatically stores the document in the correct folder or file, making it easier to locate at a later date.

In addition to these functions, eCopy ShareScan's user friendly interface enables the team at EDO to choose from the following options: scan to mail, scan to permanent archive, and scan to folder. It has also created a scan to annual report option. This enables a paper copy of the company's approved annual report to be scanned and filed in the appropriate place on the Alure system.

TAILOR MADE SOLUTION FOR THE FUTURE

The combined Canon MFP, eCopy ShareScan, Alure CRM and G-DAC connector have accelerated the pace at which EDO moves to a more paperless office model, with plans in place to scan and file incoming mail in the near future. Currently, the company is testing a scan to invoice function.

Talking about the solution's current and future benefits, Arjan said, *"This set-up has helped us create our digital workflow foundation for the future. Filing and searching for digital documents is now much easier, which is an appreciable productivity boon and time-saver. Thanks to eCopy ShareScan's flexibility and compatibility with the G-DAC connector, we can work toward throwing away our paper archives."*

Long term, EDO plans to help its customers benefit directly from the eCopy ShareScan, Alure and G-DAC solution, as Arjan explains: *"We are considering offering our clients access to a permanent archive portal, so they can access scanned documents in a secure environment, giving them even more convenience and flexibility."*

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