

Cartwrights Case Study

Summary

This long established progressive chartered accountants practice was looking for a document management system to release space taken up by filing cabinets and to speed up retrieval and communication of filed documents.

About the client

Cartwrights has been established for 27 years and are a leading north London chartered accountants practice based in Barnet. They are an active member of the UK200 group within the BIFM.

The Problem

For some years, old files were being collected by a document scanning bureau, scanned & filed off site into a document archiving software package and returned to Cartwrights on CD, for viewing on a standalone PC running the archiving software. This service was becoming increasingly expensive and access to the information was limited to a single PC. Andy Hill, the partner responsible for office services and IT had previously trialled other document management systems but the secretaries rejected them because they were difficult to use.

The Solution

The customer has installed a 30 user FILEstream network system with a Kodak i160 scanner and an Infotec 21

60 multifunction printer /scanner /copier. All client correspondence, tax correspondence and payroll bureau documents (scanned paper, MS Outlook emails, MS Word letters, MS Excel spreadsheets) are filed in FILEstream. All 30 members of staff can now quickly search for and work on appropriate documents at their PC.

Cartwrights are now looking to roll FILEstream out to other departments such a H.R. and internal accounts.

The Benefits

Andy Hill lists the following as the main benefits of installing FILEstream:-

- Considerable space has been saved because filing cabinets are no longer required to store paper files.
- Documents are retrieved more quickly and with more accuracy which saves staff time.
- Documents are no longer lost or on someone's desk when needed.
- Documents can be sent to customers quickly which creates a good impression to customers and saves staff time.
- More than one person can view the same document at the same time.