CASE STUDY

ACCOUNTING SERVICES INDUSTRY

BDO Seidman

Securing peace of minds

CHALLENGE

- Scanning system was not intuitive for users, causing IT support headaches
- Unable to adequately track document-related activities
- No way to easily include paper documents corporate-wide in Interwoven document management

STRATEGY

- Installed eCopy ShareScan® on 50+ Ricoh and Kyocera-Mita MFPs
- Expanding integration with Interwoven WorkSite from eCopy Desktop™ for user convenience

RESULTS

- Improved employee work environment by implementing an intuitive, easy-to-use scanning solution
- Decreased average time per scan job by 90 seconds, saving at least 150 hours per month across the enterprise
- Full audit trail for all scanning activities helps facilitate compliance
- Integration of all document processes - including paper, e-mail, Microsoft Office suite applications and specialized applications - within the enterprise document management system.

ABOUT BDO SEIDMAN

For almost 100 years, BDO Seidman has provided assurance, tax, financial advisory and consulting services to a wide range of publicly traded and privately held companies with a sophisticated array of services. With revenues of nearly $600 million and 3,100 employees, BDO Seidman operates from 35 BDO Seidman offices and has alliances with more than 200 independent firms nationwide.

"The productivity benefits BDO Seidman has realized from our eCopy implementation speak for themselves and validate our investments in the solution. Our business is information on paper, and document management is at the core of what we do. Working with eCopy has made it easy to bridge the paper and digital gap while still ensuring we meet regulatory requirements.

— **Dan Johnson**
Enterprise Architecture Manager
BDO Seidman

THE PREVIOUS SCANNING SOLUTION PRESENTED A NUMBER OF OPERATIONAL ISSUES...

for the firm, which operates in a highly regulated and paper-based industry. Using its Ricoh and Kyocera-Mita MFPs to scan images, files were scanned to folders on dedicated PCs. The process was not intuitive and educating users on where to scan files was a support headache. In addition, the solution did not provide a compliant document management process required for government regulations.

"From a centralized support point of view," says Dan Johnson, enterprise architecture manager, "it caused us a lot of problems with document retention, data retention, data management and discovery — these standalone systems could not be managed centrally. Any issues or software updates required hands-on support at the remote

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site and you had no way to know exactly what was stored on each PC."

The firm was seeking a solution that was more intuitive, could provide an audit trail and improve productivity, and could be linked to its Interwoven Worksite document management solution.

BDO SEIDMAN IS WORKING MORE EFFICIENTLY...

Today, the eCopy solution supports 2,500 of the firm's 3,100 employees, using a blend of scan-to-email and scan-todesktop to process a wide range of paper, including tax organizer documents, W2s, mortgage statements, interest statements, inventory controls, financial statements, log files, and additional support materials. With the Interwoven WorkSite MP Connector for eCopy ShareScan from ScanPoint in place, the company can seamlessly move files into its enterprise document management system for improved security and easier access.

About 25% of scans are sent to the user's desktops for further processing with eCopy Desktop. In addition to user convenience, this scan distribution option helps meet regulatory requirements for the firm's financial advisory service, Trenwith. Trenwith must operate separately from BDO Seidman and can not be on the same e-mail or Intranet system, so business activities that must be conducted at "arm's length" to comply with SEC regulations.

THE PRIMARY BENEFIT TO BDO SEIDMAN WAS AN INCREASE IN EMPLOYEE PRODUCTIVTY...

"One of our key objectives in implementing the eCopy solution," said Johnson, "was to ensure that our people are happy and like their jobs. Easy-to-use systems like eCopy make that happen for the more than 2,500 employees that are using the system."

The benefits to BDO Seidman don't stop there. "We did extensive testing during the pilot program," he says, "to quantify the 'soft' savings we could achieve due to increased productivity." The eCopy implementation has resulted in an average 90-second time savings per scanned job. At an average of 6,000 scan jobs per month, a cumulative time savings of 150 hours of professional time or more on a monthly basis is recognized.

BDO Seidman is in the process of developing a Connector to Interwoven Worksite from eCopy Desktop. "One of the ways we will use this is to save time in our tax organizer process." These documents, consisting of 100 pages or more, must be split and distributed to multiple places within the organization for further processing.

"With this final piece in place, I will have integrated all inputs to my document management system," adds Johnson. Scan to eCopy Desktop also makes it easier to distribute documents to auditors in the field. "Sixty percent of the firm is in the field 90% of the time," explains Johnson. "We could distribute files before using email, but now documents are scanned to our centralized document management system for people to retrieve at their convenience." In addition to improved employee productivity and satisfaction, BDO Seidman is delighted with the security and control offered by its eCopy solution. "As a company, we need secure and controlled systems to ensure that we meet all regulatory and data protection requirements," concludes Johnson. "eCopy gives us that peace of mind."

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