www.conarc.com

This offering comes at the DMS application from a slightly different perspective than the other products reviewed here. Conarc, the developer of iChannel, has integrated a comprehensive CRM (client relationship management) system with DMS functionality. This approach is quite logical because in the typical business processes within an accounting and tax firm, nearly every document is associated with a client, and the ability to have a deep dataset of client information directly linked to documents and files can be helpful. This also facilitates the integration of the vendor's project management module that pulls information from both the client and documents databases.

Core Product Features & Functions

The entry point is a user homepage that displays a series of windows that provide access to information directly related to the user, including a dashboard of checked-out files, email access, project access and a calendar. Additionally, the user has access to the following lists: entities (clients) associated with him or her, associated contacts, recently accessed clients and recently accessed documents. The result is a very efficient interface for getting to the desired information quickly.

The system offers strong reporting capabilities by pulling information from the CRM, document activity history and project management reports. All incoming documents, scanned and digital, are processed for OCR on the front end. 4.5

Integration

iChannel is designed as a horizontal solution. However, it offers integration with the XCM Solutions workflow software and CCH's ProSystem *fx* Tax, Practice and Scan

applications. Integration with CaseWare is also provided. The e-Mail manager

The system is designed as a browser-based solution that can be accessed through an internal or hosted server. Conarc offers a hosted solution through a third-party data center. You can also purchase their "Black Box" solution, which is an on-premise server managed remotely by Conarc. The integrated portal module supports two-way document/file exchange. Portal document organization is facilitated by a feature that lets you design templates that can be selectively applied to clients. Email notifications are sent to clients whenever documents are published to the portal. A green symbol on the document hit list provides a clear visual cue as to which documents have been published to the portal. Likewise, an orange highlight identifies files that have been uploaded to the portal and are pending transfer to the DMS. 5

System Management

One of the most important security features that iChannel offers is its integration to the Windows Active Directory service. This enables Windows security settings to be extended to the DMS. Document versioning is supported, and the check-out feature locks down the file and puts a working copy of the file on the local drive for editing. Access permissions can be established all the way down to the document level. 4.25

Summary & Pricing

iChannel offers a compelling alternative document management solution. The integrated CRM is a significant differentiator. The depth of functionality the system offers provides a strong foundation for a comprehensive DMS/portal deployment. Pricing is $549 per seat for the first 30 users. This includes the DMS, CRM, project management and calendar modules. Additional modules are also available, including a PDF file compressor, scanning engine and full text search tool that can be purchased as a bundle for $12,000.

2010 Overall Rating 4.75