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DOCUMENT MANAGEMENT

2012 Review of iChannel by Conarc

Apr. 04, 2012

Conarc, Inc. – iChannel by Conarc

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Best Firm Fit:

The value of iChannel increases with the size of the firm as a result of all of the functionality that enables it to be used across the entire enterprise. The system is designed to be deployed in many different types of industries, it offers a wide range of features to configure the system to meet your unique requirements.

Strengths:

- The fact that it is 100% browser-enabled simplifies your deployment to end users
- You have the three deployment options; hosting, on-premise, or managed server option
- The integrated portal option provides client activity and discussion tracking to enhance your ability to service your clients in a virtual environment
- The CRM application offers you the potential to report and manage on an extended array of client information to enhance your client relationships.
- Integration with Windows Active Directory provides single sign-on support

Potential Limitations:

- Limited pre-configured integration with tax and accounting software may require additional costs to optimize the setup of iChannel in your practice

Overview

Conarc offers a suite of document management related applications including: Content Manager, Scan Station, Extranet (portal), Email Management and CRM (client relationship manager.) This collection of integrated applications can provide a strong foundation to a paperless practice model.

Some of the more notable features of iChannel include:

- 100% browser based and is available in three configurations; hosted, traditional on-premise model and a “Black Box” option whereby Conarc delivers a fully pre-configured server that is managed remotely.
- Configurable dashboard that contains various portlets of information, i.e., client list, project assignment list, recent client and document activity
- Multitude of optional methods for uploading files into iChanel including drag and drop from Windows Explorer
- Direct integration with CCH ProFx Tax, Practice and Scan software, Engagement, Lacerte tax preparation software, Caseware working papers and more
- Outlook integration facilitates dragging and dropping emails and attached files into iChannel
- Ability to track discussion thread tied directly to a specific document
- Integration with Windows Active Directory provides for single sign-on
- Documents can be checked out to your local PC for processing when you are disconnected from the network.
- Document versioning is supported
- Integrated portal can be setup with different configurations based on client type.
- Documents and files can be published to the portal with one click. Published files are identified with a green “P”
- Portal activity notifications are sent to and from the client
- The integrated CRM application tracks all portal activity by a client or third party
- Firms can communicate with clients through a secure blog on the portal
- Remote access via iPhone, BlackBerry and Android devices is now supported

- Customized workflows can be setup for tax and audit processes that will guide the engagement through the entire process
- The CRM module now offers engagement / project based reporting
- ScanStation application continually monitors specified network file folders and uploads them into the appropriate user's inbox in iChannel
- All files are stored in their native formats
- Security permissions can be established at the group level

Executive Summary & Pricing

iChannel provides you with the opportunity to deploy a suite of paperless applications with their bundle of content management, portal, scanning, workflow and CRM tools. The system can be configured to integrate with various tax and accounting software applications. This gives you the ability to pursue a “best of breed” approach with your core software applications.

All of the iChannel applications are bundled for a single price of \$540 per user for up to 30 users, volume discounts are provided after that. The annual maintenance fee is 30%. There is also a onetime fee of \$12k for a third party scanning engine and PDF compressor.

Case Study

Firm Profile

Wiss & Company, LLP

www.wiss.com

Contact – Don Logan, IT Director

The firm has four offices in the New York / New Jersey market with 33 partners and an additional 167 staff. Primary client services include tax, audit, business valuation and litigation support. The core software applications deployed at the firm include: ProFx Tax (on-premise), ProFx Engagement, ProFx Practice, XCM Workflow and iChannel.

After using another DMS solution for five years the firm moved into iChannel due to the focus on the features and functions that Conarc has designed into the system, as well as the fact that is more user friendly. The cost factor was also important in that it is costing them about 50% less than their previous solution.

Scanning Model

The firm is currently utilizing primarily a back end scanning model, with a mix of front end scanning for selected engagements. Any documents over twenty pages in length are sent to the central scanning station. Review notes are tracked in ProFx Engagement for the audit engagements. Tax engagement review notes are tracked in XCM and “works great.” Discussion notes / threads are recorded in iChannel. Adobe Acrobat, Tic, Tie & Calculate and CCH PDFlyer are used for annotating PDF files.

Benefits Achieved

The found iChannel to be considerably more economical than most DMS systems for a firm their size. Significant efficiencies have been experienced in workflows, particularly on the admin side. Importing of documents from the scan application, email, or portal is embedded into the process and can be tagged for filing with a click of the button. The firm was able to reduce the number of staff involved in importing files from three down to one person. The ability to drag and drop files into the “deskbar” and set the metadata values at that time has cut at least three steps out of their previous process.

On the IT side of things, they have found iChannel to be “low maintenance.” They do not touch the server or software, which is all managed remotely by Conarc personnel. The new user setup information is pulled in from Windows Active Directory.

Favorite Features

- Secure file send – mechanism to send a link to any document within iChannel. They can set a limit on how many times a client or third party can download a file.

- Integrated portal – An estimated 40% of clients are “actively” using the portal with a positive experience. They are currently working with Conarc to create a new interface to emulate a bookshelf type of interface.
- Deskbar – toolbar that sits on desktop to drag files into Conarc.
- CRM functionality

Lessons Learned

- Conarc handled 95% of the training and they were open minded about making enhancements and provided very quick turnaround.
- Having a dedicated person or project manager is critical. Their committee was led by an audit manager. Conarc made it easy because “they managed project for them.”
- The firm refers iChannel to their own clients which are typically small to mid-size business with less than 100 employees.
- Establish a committee, “this is not just an IT project, it is a firm project”
- Think about what you need and want and plan it out in advance
- “Fantastic company do deal with”

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