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Firm Profile

Wiss & Company, LLP

www.wiss.com

Contact – Don Logan, IT Director

[Click here for the May 2012 Review of iChannel.](#)

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

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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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