



Going Paperless

Document management is hot for CPAs in 2008.

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If the recent paperless conference sponsored by AIIM (Association for Information and Image Management) is any indication, then paperless office and document management solutions are becoming high priorities for more and more professional service firms.

This year's version of the paperless show I attended included the big hardware vendors: HP, Canon, Fujitsu, Sharp, Xerox, Ricoh and more. Many of the exhibits were running a version of eCopy to make the multi-function device more usable. Nuance Paperport enhanced the interface to the HP LaserJet MFP devices as well.

Most major exhibitors of software technology for all phases of the document management industry were present. EMC Captiva, Kofax VRS, ABBYY and Nuance were represented at each of the vendor's respective booths as well as in many partner booths. For industry users, we spent time getting an update from AnyDoc, EMC, Laserfiche, Westbrook, Questys, Spring CM and Salesforce with their new content product. Microsoft had notable presence with SharePoint and add-on products for this offering.

After observing the potential players for CPA firm document management companies at AIIM, the key competitors in this category include:

- Acct1st EDRMS
- Doc-It DM
- CCH ProSystem fx Document
- Interwoven Worksite
- Thomson FileCabinet CS
- Thomson GoFileRoom

Utility Vendors

Utility vendors had many improvements in their products in 2008 over 2007. ABBYY has improved its recognition software to translate more types of documents and its OCR (optical character recognition is an electronic version of handwritten, typewritten or printed text into machine-editable text) has been further improved. The company understands the importance of its tools to accountants and has been working on ways to make its products easier to use.

Nuance introduced multiple improvements to its product line and PaperPort, PDF Converter and OmniPage each touted notable product improvements in late 2007 and early 2008. Specifically, the

PaperPort capture interface to the HP LaserJet MFP printer families makes this device much easier to use, delivering images scanned back to the end-user's desktop. The images can then be saved in folders or dropped into document management systems.

Scanner Review

There were two notable production-quality scanner introductions. Canon introduced a new 110 Page Per Minute (PPM) scanner. Targeted to the typical workgroup or CPA firm is the Fujitsu 6140 scanner. This new scanner has notably improved paper handling capability and scans at 60 PPM for \$1,995 retail. It is a very affordable, fast color scanner as well. If a flat-bed version is needed, the 6240 is only \$2,495 retail. Notable features include:

- 60 ppm/120 ipm (image process management) B/W and Grayscale 200 dpi, 40 ppm/80 ipm Color 300 dpi
- New taper correction technology
- Ultrasonic double-feed detection
- Intelligent Multi-feed Function (iMFF)
- Paper protection technology
- Enhanced hard and embossed card scanning (up to 1.4 mm thick)
- Long document scanning (up to 10 feet)

Equally impressive is the new ScanSnap S300 that shipped in late 2007. The S300 is the world's smallest color duplex ADF batch scanner. It is designed to provide high performance for mobile use and weighs less than 3.1 lbs. It has a footprint half the size of a letter sheet of paper and is powered by USB connectivity or with the included AC adapter. Notable features include:

- Easy "one-touch" scanning to searchable PDF
- Double-sided color scanning without a reduction in speed.
- Holds up to 10 pages in the Auto Document Feeder (ADF)
- Scans paper the size of a business card up to legal size
- Eight pages per minute (simplex) and 16 images per minute (duplex)
- Advanced automatic image correction features including color detection, blank page detection and deletion, paper size detection, image de-skew, content-based rotation

Workflow Tools

Another observation that jumped out at me at the AIIM conference was that jumped out at me is that workflow clearly has arrived. Workflow tools to define processes dynamically are improving notably as we learned from a hands-on session with AnyDoc. Workflow gives users the ability to move documents electronically through an organization. Workflow is built into most advanced document management systems and is getting easier to use. Laserfiche had vastly improved the workflow in their product. The two competitors with the largest market share in the CPA firm space are XCM Accounting Workflow and GoFileRoom ClientFlow.

The presentations I attended were good, although there is clearly a need to simplify software design and use. Several publishers are actually reducing their product complexity by removing features and improving the user interface.

Document management is maturing quickly and the products are getting faster and easier to use. Search and workflow is notably better. Portals are improving, too. Additionally, e-mail integration is becoming

second nature as is appropriate records retention policies. If your organization has not implemented paperless, you should know the leading edge and early adopters have chosen and are implementing document management. Can you motivate your firm to adopt this technology? Or should I say, can you afford not to?

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