

*Case study*

## CCH Document Management

### Hogg & Thorburn

Based in Galashiels, the four partner firm of Hogg & Thorburn has over 50 years' experience advising businesses in the Scottish Borders and beyond. They offer a full range of accounting and advisory services to businesses and individuals, with particular specialisms in construction, retail, medical, farming and the hotel and licensed trades.

**Several years ago we set up procedures to capture softcopies of all outgoing correspondence. Each client had their own folder on the network where we stored these softcopies, but we never scanned incoming post. Nor did we file emails centrally - it was the responsibility of individuals to keep local copies of emails in their own mailboxes.**

The system worked well enough for outgoing letters and other correspondence - partners could find documents without having to look through a physical file - but we still had an issue with emails. This, of course, would only get worse as emails became more and more common as a form of correspondence.

When our computer system started to run out of storage space, we took the opportunity to look at a proper document management system.

Because we already had CCH Personal Tax, CCH Corporation Tax and CCH Accounts Production, plus our client database running under CCH Central, CCH Document Management was an obvious contender. We did consider alternatives, including the Ricoh document management system, but CCH Document Management had everything we needed and it integrated with our other software, so it was a natural choice for us.

The system itself is very straightforward and easy to use. In fact, the hardest part has been putting procedures in place and enforcing rules about the categories and keywords that are applied to documents so that everyone else can find them easily. Then it's just a question of encouraging people to get into the habit of using the software. In our experience, you have to spend some time making sure everyone is following the rules consistently, rather than doing their own thing.

We decided to implement the software in phases so that we could deal with any issues as they arose. Admin staff and typists were the first to start using it, followed by the tax department and

*“Because CCH Document Management runs under CCH Central, the contact details for the client are already set up so when you file an email, for example, the system automatically recognises who it's coming from or going to...”*

*Case study* CCH Document Management / Hogg & Thorburn

payroll bureau and we're planning to roll it out to the accounts department over the next few months.

We have a large payroll bureau here, running payrolls for around 125 companies. We had not originally intended to use CCH Document Management within this function but when the team saw it in action they asked if they could use it themselves. It was very much their decision, because they could see the benefits it would bring. We need to keep copies of timesheets for HMRC but we also scan payroll reports, payslips, the cash analysis... in fact pretty much everything that comes in or goes out. That gives us a single PDF for each week or month that we can refer back to, which is really useful if you need to check historical figures.

Because CCH Document Management runs under CCH Central, the contact details for the client are already set up so when you file an email, for example, the system automatically recognises who it's coming from or going to, which makes the process very easy. The software really is very simple and, in general, staff have found it easy to use and have adapted quickly."

*Isobel Black*  
Practice Manager

*"The software really is very simple and, in general, staff have found it easy to use and have adapted quickly."*

**Find out how we can help**

[www.wolterskluwer.co.uk/software](http://www.wolterskluwer.co.uk/software)



[cchsoftware@wolterskluwer.co.uk](mailto:cchsoftware@wolterskluwer.co.uk)