

CASE STUDY



PKF

Certified Public Accountants
A Professional Corporation



NOVEMBER 2009

"We felt very confident that we made the right decision in selecting RBRO. Not only did they have the right product, but we believe they have the depth to make the necessary adjustments as our needs change.

Working with a company that provides consistent follow-up and excellent support is refreshing."

*Tom DeMayo, MCSE CEH
IT Supervisor
PKF, New York*

PKF NEW YORK, CHOOSES RBRO SOLUTIONS TO ENHANCE THEIR IMANAGE WORKSITE EXPERIENCE

PKF, Certified Public Accountants, A Professional Corporation has almost a century of providing quality client service. The directors of **PKF** have expertise in a wide-range of industries and serve the accounting profession through participation on committees of their State CPA association and active memberships in industry organizations related to their client base.

In Need of a Solution

“While planning the design and implementation of the iManage WorkSite solution, we quickly realized that we needed additional products that would allow us to work seamlessly between CaseWare (Working Papers) and the DMS. We also felt we needed a more robust solution to aid us when taking documents off-line or performing an audit at the client site.” Tom DeMayo, IT Supervisor, PKF NY

PKF New York’s

CHALLENGES

- Retaining a solutions partner that understands our needs and the way accounting firms work
- Seamless integration was required between WorkSite (DMS) and Caseware
- Needed the ability to handle the lock down process
- Ability to take offline exactly what we need and easily collaborate with fellow team members while in the field especially since not all of our clients have internet access or the ability to provide a consistent VPN connection
- Avoid having to retrain users to work in a totally different manner from what they were used to as this may affect client response times

RBRO Solutions’

Responses

- This partner understands accounting firms and is also able to accommodate (quickly) our needs into their products
- CaseLink made accessing Caseware easier while giving us very intuitive movement between it and the DMS
- Very flexible and captures the lock-down and roll-forward process
- DMSBriefcase allows us to do much more when working offline, from sharing a briefcase to moving the briefcase from one user to another. Plus, it is no longer necessary to have an internet connection when offsite.
- Workflow conforms to how we work without any major shift in our process, these products increase user efficiency and client response times



Project Approach

Knowing that PKF needed a solid integrated solution between Caseware and WorkSite as well as a more robust offline solution, DeMayo approached both Interwoven and their implementation partner to find a best of breed technology solution provider focusing on integrated enhanced solutions for WorkSite. Two company names were provided. After meeting with both, DeMayo came to the conclusion that one company only addressed the Caseware component and in a limited way. The second company (RBRO Solutions) was chosen by PKF, not only to address their current needs, but also to provide additional WorkSite enhancements.

Project Details

In June of 2009, PKF met with RBRO Solutions and was impressed by RBRO's extensive commitment and expertise in relation to the accounting industry as well as their comprehensive knowledge of CaseWare and the iManage WorkSite Document Management Solution (DMS).

After a series of meetings to understand PKF's needs and key requirements, RBRO presented CaseLink and DMSBriefcase to PKF. These two products allowed PKF to realize their goal of being able to work seamlessly between Caseware and WorkSite, while knowing they could very quickly and easily take one document, a folder or even an entire workspace offline when going to a client site.

RBRO assisted PKF throughout the entire installation process and provided after-sales support to ensure the product worked the way PKF expected and needed.

CaseLink

*"Our users feel that CaseLink has helped to make the Worksite transition that much easier."
Tom DeMayo*

Storage and Retrieval

CaseLink enables firms to easily store and retrieve entire CaseWare projects or single documents within the Interwoven WorkSite document repository.

Link or Export

CaseLink also allows users to save PDF copies of CaseWare documents directly to the engagement workspace in WorkSite and allows users to create WorkSite document links within CaseWare.

Project Archive/Executive Review

At the end of a project, it is possible to create a PDF archive of the CaseWare file structure within WorkSite in order to have long-term access to a static record of the engagement documents. This is made possible simply by clicking on CaseLink's 'Synchronize to WorkSite' option from within the CaseWare application. Non-CaseWare users can now have easy access to relevant information from within WorkSite. Completed work papers can now be added to workflow processes for quick review by management.



DMSBriefcase

*“DMSBriefcase took what we do internally and brought it to our offsite process.”
Tom DeMayo.*

Features

- Ability to handle synchronization even with minimal connection
- Always have local performance without having to worry about a slow connection back to the office
- Consistently fits with our workflow
- Ability to copy instead of just move a briefcase from one user to another

DMSBriefcase, provides an efficient way for WorkSite users to work offline within their own briefcase as well as collaborate with a team by sharing a common briefcase.

This product offers an alternative solution to Interwoven's WorkSite OffSite module with significantly improved functionality and features.

DMSBriefcase will mirror your online experience by using folders, tabs and workspaces as used in WorkSite with full functionality available including: open, close, check-in, check-out, create new files, import and export, while maintaining the history log of activities. New documents and folders created in DMSBriefcase will be added to the corresponding location within WorkSite once synchronized.

RBRO Solutions Making ECM Work

RBRO ensures that, in addition to the Accounting industry, the Legal, AEC, Corporate Financial, Government, and Media markets capitalize on their use of ECM solutions. More importantly, RBRO is enabling these industries to realize business optimization and client satisfaction from dynamic collaborative content management enhancements.

To accomplish this, RBRO is committed to providing, not only the best of breed technology solutions, but also the highest level of end-to-end services, integrated software products and, customized tools and plug-ins. RBRO Solutions is partnered with global leaders providing adoptable and scalable improvements in business efficiency and agility. With a sophisticated DMS platform, companies can grow their business to meet the needs of the ever-changing enterprise marketplace.



Some Testimonials from RBRO Clients

"CaseLink was essential to the successful deployment of Interwoven's Worksite at PKF. We also really appreciated the excellent support that we received from RBRO's friendly and professional team during our implementation."

Markus Goebel, PKF Australia

"When we implemented WorkSite, we wanted to continue using ProLaw for document assembly, and RBRO's experts did a great job quickly integrating ProLaw with WorkSite so that both products work together smoothly. The folks at RBRO have an excellent grasp of a law firm's culture and exceptional technical knowledge of the products they work with. Most of all, they really understand customer service. I highly recommend them."

Bruce Smith, Esq. - Technology Committee Chair, Drummond Woodsum & MacMahon

"Worksite is the best DMS in its class and definitely improves business productivity. Combine that with RBRO's knowledge of the product and understanding of the legal industry and you will end up with a great solution."

Janmeet Miranahshah - Information Systems Manager, Fillmore Riley LLP

"... Just a quick note to let you know that the SafeDelete system works like a charm. We have installed it on all 150 desktops and the users are absolutely thrilled with the ability to remove these documents from view safely and easily."

"From my perspective, I had put off purging documents using the WorkSite function as it did not offer a clean and simple method to allow me to archive and delete. With your tool however it is now as simple as running the program whenever I see fit (possibly only necessary semi-annually or annually) and then burning the purged documents to CD-Rom for permanent storage and retrieval capability if the need ever arises. It is great insurance and most importantly it has made the whole process automated to the point where what would have taken me hours and hours to complete will now only take minutes a few times a year. Definitely worth the money!"

Scott Johnston - Manager of Information Technology, HarrisonPensa LLP

