



XCM INTEGRATION WITH DOCUMENT MANAGEMENT SYSTEMS (DMS)

XCMworkflow® (“XCM”) is designed for public accounting firms and corporate accounting, audit, and tax departments that need to manage due date tracking, risk mitigation, work quality, employee engagement, and more. It’s for projects with multiple team members—where deadlines are critical and risk can be high—that need to be completed on time, accurately, and within budget.

By integrating XCM with a Document Management System (“DMS”), organizations can easily access important client documents, research notes, and other essential files that are associated with specific tasks, via a single-click.

This 1-click access not only allows you to understand what documents were used to prepare, review and complete the task, but significantly decreases the amount of time it takes to search through document storage file folders to locate your documents. You never need to worry about version control as you are always viewing the most current version. Being able to easily identify the task’s related documents reduces stress and anxiety during busy season, as well as the amount of time needed to review and complete the task, which increases your profitability.

XCM is compatible with most document management systems, including many that are web-based. With XCM, all types of documents can be easily linked to your digital control sheet, while preserving the security and controls of your DMS.

XCM DMS integration also offers rollover options for document links, allowing current documents to automatically carry forward to a future task dependent on the settings on the control sheet.

How It Works

XCM allows you to link documents stored in your DMS to the related task control sheet. Assuming you have appropriate access rights, these links allow users to securely open files containing information pertinent to the task from the DMS system directly from the control sheet. As the task moves through the defined workflow, each XCM user can follow these links to quickly and efficiently access information needed to prepare, review, and complete the task.

Another linking feature lets users reference important web pages with XCM tasks, for easy access to web-based research and documentation used to complete the task.

XCM's DMS integration offers rollover options for document links. Files can be coded for current year, for current and next period end, or as permanent. As the task is rolled over, so are the related document links, ensuring critical information is retained with the client year over year.

Here are some of the document management systems that are integrated with XCM. If your firm uses a document management system that is not listed, contact XCM to discuss the options we have available.

**Thomson Reuters
GoFileRoom®**

Conarc® iChannel

Microsoft® Sharepoint

Windows® Explorer

CaseWare®

iManage™

eFileCabinet®

CCH® ProSystem fx® Document

CCH Axxess™ Document

**XCM is the only productivity enablement and workflow platform
endorsed by the AICPA, and complies with the controls and
applicable criteria of the AICPA Trust Service Principles.**



To learn more about how XCMworkflow DMS Integration can increase productivity in your organization, please contact us at **781.356.5152** or visit **xcmsolutions.com** today.