

**Aarons, Grant & Habif, LLC**

Atlanta, GA



*"I cannot express to you how pleased I have been thus far with the implementation of our system. Everyone at Premier Logic has been so professional, thorough, courteous and prompt. I wish all companies were this easy to work with!"*

*Lynn Altman*

*Aarons, Grant, and Habif, LLC*

**Business Profile****Aarons, Grant & Habif, LLC**

Offering specialized business services in the areas of tax planning, accounting and preparation services, as well as other industry-specific client services.

**Industry**

Accounting and Consulting

**Technologies Used**

Xerox's DocuShare  
Xerox's FlowPort

**Business Benefits**

- Decrease storage costs
- Eliminate document retrieval costs
- Improved employee efficiency
- Improved business continuity
- Improved customer response times



**Premier Logic provides a full range of services that enables your organization to gain the maximum benefit from your document management solution. We offer intuitive and secure web-based document management application that enables workgroups and document intensive business to dynamically capture, manage, retrieve and distribute information.**

**For more information please contact Premier Logic at 770-928-4441, and at [www.premierlogic.com](http://www.premierlogic.com)**

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Aarons, Grant, and Habif, LLC (AGH) is an accounting firm located in the Buckhead area of Atlanta, Georgia. Specializing in traditional tax planning and preparation services, as well as industry-specific consulting services; AGH has consistently grown since its inception in 1976. AGH prides itself on helping its customers protect and manage their assets more effectively with services like cost segregation studies, cash flow and budget analysis, and mergers and acquisitions.

**Challenge**

In 2003 AGH decided to replace its existing paper-based system of storing documents with an integrated document management system. The primary problem, according to Lynn Altman, was that too much time was being spent trying to store, archive and retrieve documents in the traditional storage mediums. Additionally, AGH felt vulnerable to loosing or inadvertently destroying critical pieces of customer data. The decision was made at the partner level to form a document management committee whose sole purpose was to identify and implement a cost-effective, scalable document management system.

AGH selected Premier Logic to assist them with two challenges. 1) Help AGH determine an appropriate document management software package that fit their current and future needs; and, 2) Implement the new system prior to their busy tax season. And, according to Lynn Altman, AGH was looking for a partner that could help them through the entire implementation process, rather than just sell them software.

**Solution**

Premier Logic utilized its proven methodologies to quickly inventory and prioritize AGH's needs. Premier Logic performed a trade-off analysis between Xerox's DocuShare and Microsoft's Sharepoint Portal Server software packages. The analysis was performed as an evidentiary study to verify which package fit most tightly with AGH's needs. Based on the requirements gathered during the Vision Workshop; Premier Logic was able to show Xerox's DocuShare was better fit for their needs and provided their firm greater value. This evidence was based on out of the box functionality, ease of customization, price, and scalability. AGH made the decision to utilize Xerox's DocuShare Document Management package.

**Results**

The staff at AGH is looking forward to increased cost savings and a stronger bottom line as a result of the DocuShare implementation. By decreasing storage costs and virtually eliminating retrieval costs, AGH is able to enjoy some "Hard R" returns on their investment. Additionally, AGH staff is enjoying the ease of document lookup and storage, improving overall employee efficiency. AGH plans to extend this solution to their outside customer base with the upcoming tax season, and be more responsive to their customers' needs.



### **Customization**

AGH's needs required Premier Logic to perform some customization on the DocuShare software package. The modifications were needed to eliminate user error, increase efficiency, and promote ease of use to the user community. The modifications included:

- Automated client folder creation
- Quick access client search
- Smart folder wizard creator
- Automatic metadata population

All modifications were completed at Premier Logic's development center in Atlanta, with input from Xerox technical resources.

### **Premier Logic's Process**

Premier Logic utilizes its standard process to properly manage entire projects from planning through closeout. Our phased approach allows companies to understand how solutions can impact their business and properly plan for future releases. We concentrate on implementing the functionality that provides the quickest, highest business value.

We use a three step approach to properly understand and implement all document management solutions. The first step drives consensus on the requirements and prioritizes them by business value. Step two turns the requirements into detailed specifications and produces a project plan. Implementation, training and a project closeout completes the process. Using standard methodologies and tools ensures project success and maximum business value.

### **DocuShare**

*DocuShare is an innovative document and content management system that helps customers lower costs, increase productivity, and leverage corporate assets. DocuShare enables organizations of all sizes-from small businesses to global enterprises-to dynamically capture, store, share, manage, retrieve, and distribute information, regardless of its source, user skill level, location, or corporate infrastructure. Highly intuitive and secure, DocuShare leads the industry in speed of deployment and ease of administration and use. It is the only cross-platform document management solution to significantly reduce IT requirements, resulting in lower total cost of ownership (TCO) and providing an immediate return on investment (ROI).*

### **FlowPort**

*FlowPort is documentation distribution and transformation software that helps eliminate bottlenecks associated with paper intensive business processes by merging paper documents into an electronic image used for storing, e-mail/messaging, workflow and document management systems using network office equipment. FlowPort captures and integrates paper documents into a digital repository, where content may be easily accessed, retrieved and distributed*

*Flow Port reduces costs by decreasing telecommunications and overnight mail costs by using internet fax, remote printing and email distribution features.*