



IRIS | Document Management

Stop Duplication with IRIS's Document Management Systems

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Your firm could be weighed down by duplicated documents and files. Each one is costing your firm valuable time and resources. Discover why you need to remove duplicates and how IRIS's document management solutions can help streamline your firm and remove all duplications.

Duplications Are Expensive

You would never run a marathon while wearing ankle weights and a backpack full of water, so why are you allowing your firm to be weighed down by duplications?

Duplications put unnecessary restrictions on your firm and create a hidden cost within your firm. Because duplications force your team to work harder to gather all relevant information about a client and can even lead to you doing the same process two or three times for the same client, duplications cost your firm hours of time that can be better invested.

Duplicate files and folders within your system provide no value or benefit to your firm. They complicate your processes, make it difficult to locate client information, lead to more errors, and require you to do unnecessary work.

IRIS's document management system helps you save time and money by completely removing duplications and preventing future duplications from ever starting.





How Does a Document Management System Help Remove Duplication?

To help your firm be more efficient, the first thing you should do is to make sure that no new duplications are made. IRIS's document management system provides multiple layers of protection to ensure new clients, files, and folders are not duplicated. This starts with a global filing system and database that uses a universal naming convention and is protected and backed by automated checks that ensure you have no new duplications.

Global Filing System

Duplication protection starts with how your files are stored and organized. IRIS's document management solutions provide a standardized filing structure that ensures every document has a place to be.

Think of this process like having assigned seats in a classroom in alphabetical order. Everyone in the class knows that the A's are in the front row while the Z's have to sit in the back. When a new student is added to the class, it's obvious where their new chair will be placed because the structure already exists.

Having an established structure helps fight duplication because it establishes where files should be, just like a seating chart. Trying to make a duplicate is like trying to fit two students in the same chair. Because the location has already been taken, you can see the document has already been created, and creating a duplicate file is impossible.

A global filing structure helps stop duplications and makes finding the documents you need easier, no matter which project you are working on. Because the structure of your database and your files are standardized, you'll always know where to look for the files you need.

Universal Naming Convention

IRIS's document management solutions create a universal naming convention for all files within your firm's database. This, combined with the global filing system, ensures that every file follows the same naming conventions, making it easy to identify a file based only on its name.

Standardizing naming conventions removes duplication because having two files with the same name in the database is impossible. If anyone tries to create a duplicate and follows the naming convention, they will be unable to create or save that file, making it impossible to create duplicate content.

Automated Checks

In conjunction with a globalized filing system and universal naming conventions, IRIS's document management system continuously checks for duplications.

In theory, the filing system and naming conventions should make it impossible for anyone to create a duplicate file, but to be safe, we automatically and continually check for duplicates. If anything does sneak by, the automated checks will immediately notify you of any duplication or attempt at duplication, helping you further protect your firm against duplicate files.



Identify and Fix Your Past Duplications with IRIS

When you choose to use IRIS's document management solutions, we know that you're not looking just to stop your firm from creating duplications in the future but that you're looking to identify and remove your past mistakes. That's why when your firm chooses IRIS, we work with you to migrate your existing files and folders into a new standardized convention.

Throughout this process, we help identify, merge, and remove duplicates so you can rest assured that your firm is protected from duplications going forward and that you are starting on a clean slate and have no existing duplications in your system.

Get Started with IRIS

IRIS's Document Management Solutions help streamline your firm, removing duplicates and making it possible to find the document you need when you need it. Get started today and see the difference IRIS can make on your firm.

IRIS Americas is part of IRIS Software Group. It exists to take the pain out of processes and let professionals working in CPA firms and businesses comply with regulations, drive productivity, and better engage with key stakeholders. Its brands include IRIS Star Practice Management, IRIS FMP, IRIS Innervision, IRIS Practice Engine, Doc.It, PSI Payroll, AccountantsWorld, Senta and Conarc.

IRIS works with thousands of CPA firms in North America, including 52 of the top 100 CPA firms in the US, and provides innovative solutions to serve accountancy customers in the North American market, making IRIS the go-to partner for CPAs. IRIS has over 100,000 UK and international customers, with 80% having a tenure of five or more years.

