



## Centralized Data: Digging into the Core of the Future-Ready Firm

With the introduction of CCH Access™, CCH has delivered a new way of thinking about tax software. At its core, CCH Access houses all of a firm's client and staff data, acts as a central dashboard of firm activity and facilitates more efficient workflow throughout the tax process. Here we examine how CCH Access can help firms:

- Simplify and centralize updates to client and staff information.
- Improve quality of client service.
- Reduce errors.
- Increase efficiency and focus on higher-value work.
- Access and update comprehensive staff information quickly.

For years, the accounting profession has been abuzz with the promise of what has amounted to accounting's holy grail: a single, integrated source for all of a firm's client, staff and project information — from beginning to end. It's no secret that maintaining current and accurate client and staff data is a difficult and time-consuming task, impeding the efficiency of preparers and IT staff alike. With the average accounting firm using a multitude of different software programs — each with its own separate database — it's not difficult to see why the promise of a common solution has gained an almost mythical status.

Until recently, creating a common solution was out of reach for most firms due to technology limitations, the complexity and sheer number of their software solutions and cost. Today, technology advances now make the promise of a single solution a tangible reality.

CCH is proud to be the first provider to deliver a single, centralized tax solution with CCH Access. As the leading thought and technology leader in the tax and accounting profession, we are continuously leveraging the latest technologies to improve CCH products and services and make our customers' lives easier. To that end, CCH Access utilizes a cloud environment and an open architecture that will tighten integration across solutions. The purpose of this white paper is to share CCH's vision for the future and to provide an overview of the benefits of a centralized database.

## Improved Accuracy and Efficiency Through Automatic Content Flow

One of the greatest benefits of centralized data is the ability to have client information automatically flow to the appropriate locations throughout the software. Historically, legacy products tended to share data inefficiently. Contact databases didn't "communicate" with Customer Relationship Management (CRM) or email systems. Practice management applications didn't share data efficiently with tax programs, etc. As a result, client names, social security numbers and basic information had to be re-entered each time the software called for them, wasting valuable time and energy. Maintaining accuracy was also a challenge with multiple entries.

With a common database, the preparer only needs to key information once, and the program automatically flows content to the appropriate locations, saving time and ensuring that the information is current and correct. For IT staff and those charged with maintaining data integrity, this advancement means updating one database vs. updating each application individually.

## Tighter Integration for Shared Efficiency and Easy Set Up

CCH is committed to tightening the integration across multiple CCH Access modules, starting with CCH Access™ Tax, CCH Access™ Practice, CCH Access™ Document, CCH Access™ Workstream and CCH Access™ Portal. CCH Access is central to this strategy. As a result, content flows to all CCH Access modules, so that preparers using CCH Access Tax do not have to re-enter information in CCH Access Document or CCH Access Practice.

As a result of tighter integration, new products will take much less time to set up. When a firm adds additional CCH Access modules, they will all share the same common database, as well as the same dashboard, administration options and user interface. If users change a client's address in one module, they have the option of pushing those changes to the common database, eliminating the need to make the same change in other applications and ensuring consistency and accuracy.

## Single Sign-On for Easy Access and Smooth Workflow

One of the added benefits of tighter integration is the ability to offer users a single sign-on. Instead of having to log into each CCH application individually, staff can have one login ID and password that admits them to the CCH Access dashboard — where they can access all of the functionality they need to do their jobs.

For example, a preparer logged into CCH Access can work on a tax return, update project status and track time without having to enter another set of credentials. This single sign-on capability saves time and improves overall efficiency.

## Centralized Credentialing for Easy Set Up and Security Management

CCH has fully integrated with Microsoft® Active Directory, which allows a firm to use Active Directory as a single point of reference in the credentialing process. As a result, IT staff only need to set up staff one time within the system and CCH will pull the credentials directly from Active Directory.

With Active Directory integration, IT professionals can set up a new staff person (or groups of people) and assign the person to an existing security profile template, depending on the type of staff and the type of work that they will be doing. This represents a huge increase in efficiency, enabling IT to get new staff up and running in just a fraction of the time than if they had to set up each new staff member in each program individually.

## The Reality of a Common Database Starts Now

In conclusion, CCH Access takes the promise of a centralized database and makes it a fully formed reality. This advancement signals a new era for the accounting profession, bringing to fruition the promise of centralized data and a unified framework.