CPA
Practice **Advisor**

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As I do with every article I author, I started this piece by thinking about the key

review in 2009. Clearly, the vendors are learning from you, their customer base. Part of our review process is to spend some time with the vendor going through a presentation of their system. This year, one of the most frequent comments was, "We've added this feature or made this change, based on feedback from our customers." Not only does this mean the vendors are continually working to improve their products, it also means that their customers are integrating their DMS deeper into their workflows and identifying specific ways to improve the applications. It is probably safe to say that DMS has moved beyond the early adapter stage to achieve critical mass. However, there are still many firms that have yet to take the plunge. If your firm is in that camp, you should have some conversations with firms that have successfully implemented a DMS and listen carefully to their stories about implementation — what worked, what didn't work and what lessons they learned. You can then take that knowledge and insight and incorporate it into you implementation plan.

Regarding the emotional aspect, we anticipate that the wildly popular iPad device and all of the new Android-based tablets that will launch later this year will usher in a whole new level of interest in DMS. We also expect this trend to increase interest in related products such as workflow software and client portals. Let's face it, we have been talking about "going paperless" for many years now, but it has been extremely challenging for most firms. One factor that has hindered adoption is our profession's love for paper. And the experience of working with electronic documents on vertically positioned screens, no matter how many we have, is just not the same. Tablets changes this equation. We finally have a device that gives us a more natural alternative to working with paper documents, and they are truly portable. You can take the iPad on the road without having to pack up a bulky laptop and a bunch of cables. You can take it into the conference room and start pulling up documents during a meeting and annotate more naturally with the touch screen. We are anxiously waiting to see what the vendors do over the next couple of years to enhance the appeal of integrating tablets into your workflows.

This year's evaluation criteria are organized into four main categories:

emerged as the more important aspect of DMS in recent years. This decade is shaping up to be the decade of business process optimization. In this section, we evaluate the integration with core tax and accounting applications, as well as the primary MS Office 2010 applications: Excel, Word and Outlook. Strong integration is critical to achieving true workflow automation. We also take into account any features that enable the automatic routing of individual documents or binders with engagement management features such as scheduling, checklists, review note management and more.

Document Control — This category gets a little more technical in nature. Specifically, we evaluate the document security features to control who has access to which documents and what they can do with them. This includes retention management tools that automate the archiving and purging process, version control to keep track of the various versions of documents and files as they evolve through their life cycle and, finally, check-in/check-out features that manage the integrity of documents as various people throughout the organization are viewing and editing them.

Special Features — Here, we identify the features that help extend the system beyond document management. We evaluate whether or not the vendor provides an integrated scanning solution and/or an integrated client portal application. We also determine whether or not the system is browser-enabled, which can provide for a more consistent interface across multiple infrastructure platforms with a better likelihood of being compatible with all the various appliances like smartphones, iPads, etc. The availability to purchase the solution in a SaaS model is evaluated, as more and more accounting and tax applications make the move to the proverbial cloud.

We have simplified the presentation of these reviews, with a snapshot of each product that highlights key factors you'll want to consider when looking for a DMS product. Comprehensive reviews of each product are available at the designated URLs and support the ratings provided here.

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