

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

From the June/July Review of Document Management Systems

Laserfiche was established in 1987 to provide enterprise-level DMS solutions to many different industries including corporate, healthcare, nonprofit and the municipal government market. Due to its extensive penetration into regulated industries, the vendor understands how to meet and exceed regulatory compliance requirements — a natural fit for accounting and tax firms. Laserfiche is installed at over 25,000 organizations, which implies extensive experience in the DMS market. This is a horizontal solution as opposed to an accountant-centric solution.

Usability — 5 Stars

The Laserfiche interface is based on a common folder view similar to Windows Explorer. Each folder list starts at the repository level, which can establish the folder and subfolder tree template within the repository for navigating files based on the type of information. Each folder has a pre-established template for the indexing metadata that is associated with that type of document. The indexing metadata can be customized to your specifications and can include drop-down lists such as client number, year, PIC, etc.

Every page is stored in the system as a single page TIFF (tagged image file format) file, which is a key engineering feature that significantly enhances the speed of retrieval. The multiple pages are transparent to the user and appear as if it is one document file. The system includes a set of proprietary stamps for annotating documents, including the ability to add searchable sticky notes, highlighting, redaction of sensitive information and more.

Scanning — 5 Stars

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

automatically index documents based upon content that is located at a specific position on the paper document or file, i.e. invoice number.

Integration — 4 Stars

Laserfiche does not take the cookie-cutter approach and is not an accounting-centric solution that offers pre-developed integrations with accounting and tax applications.

Rather, the software is designed to be configurable and flexible enough to work with every accounting and tax application. The Laserfiche Integrator's Toolkit provides you with the tools to build interfaces to nearly any application. Direct integration to MS Office and Outlook is provided, including the ability to unbundle and store e-mail attachment files separately. This includes an "e-mail surveillance" system to support the SEC requirement for archiving all pertinent e-mail messages.

Workflow Tools — 5 Stars

The Workflow 8 module is dedicated to automating all of an organization's processes. You can automatically route documents and files through as many steps as you designate. The workflow reporting tools allow you to view all workflows in process as well as their status. E-mail notifications can be set up to notify users when an item requires their attention. The intuitive Workflow interface allows you to graphically model your current processes for a paperless workflow.

Client Portal — 4 Stars

The Laserfiche WebLink module provides the platform for sharing documents and information with clients. WebLink is a publishing tool that supports document presentation as well as file uploads. The WebLink tool is not an "out of the box" solution in that it requires a certain level of technical expertise to set up and deploy.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Pricing/Overall Value — 4 Stars

Laserfiche pricing will vary because the product line offers a number of optional modules that allow you to mix and match to meet your needs. The base network system is priced starting at \$2,500 plus a \$780 per-user license fee. The Laserfiche Workflow is priced at \$15,000 for 10 concurrent users. Laserfiche offers a compelling solution that is better suited for larger firms due to the depth and breadth of functionality available. It is a system around which you can build a true digital workflow model, but it is probably too sophisticated for the needs of smaller firms. To address that segment of the market, Laserfiche has introduced a new product for small businesses called Intuition (www.intuitionpro.com), which is priced at \$1,495. This is a completely different product from the Laserfiche product reviewed here and will be covered in the August Document Storage product review.

2008 Overall Rating 4.5

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.