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Aug. 01, 2008

*From the August 2008 Issue*

One size does not fit all when it comes to document management systems, which is why we have continued with our strategy of separating our review into two categories: document management systems (June/July 2008; [www.CPATechAdvisor.com/go/1966](http://www.CPATechAdvisor.com/go/1966)) and document storage systems.

So what's the difference between document management and document storage systems? Essentially, it comes down to a matter of the depth of features and functionality of the different solutions. Document management systems typically provide extended capabilities such as advanced scanning tools, deeper integration with tax software and MS Office, workflow automation tools, document retention management, and advanced security controls. Document storage systems, on the other hand, have a more limited feature set that is focused primarily on providing an alternative to the Windows Explorer model for saving and organizing your files. In fact, in many cases, these document storage systems simply serve as an alternative point of entry to Windows Explorer.

The table below provides a high-level comparison of how document management and document storage systems differ. Beware that there is overlap between each category so take the time to evaluate each vendor's solution on its own features and unique attributes.

Simplicity is the primary differentiator of document storage systems over document management systems. Document storage systems by their very nature are intended to be simple and easy to use, and the focus of these reviews is on that simplicity. After all, if the system is too cumbersome to work with, you

will naturally revert back to using Windows Explorer as your primary tool for

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features embedded in the document storage system or through reliance on Adobe Acrobat's annotation functionality. The latter is typically the case with these systems. Integration addresses the functionality to file and/or retrieve documents from within other applications, the most important being tax software and MS Office.

As you embark on your research of alternative solutions, I recommend that you take a look at a mix of both document management and document storage solutions.

This will allow you to gain a much better perspective on the range of capabilities available, and it can be very helpful in developing your paperless office strategy. I'm a big believer in "simpler is better" when it comes to software applications, but you should consider whether or not the extended functionality of a document management system is worth the extra investment. Don't buy more than you need.

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### [AccountantsWorld — CyberCabinet](#)

AccountantsWorld has been providing practical software solutions for accountants for over 20 years. The company focuses on web-based applications for payroll, accounting, fixed assets, practice management, websites, document storage and more.

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[CCH, a Wolters Kluwer business](#)  
– [Scan&Fill with Document Manager](#)

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DM) is its direct integration with the Drake tax software.

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### [DYMO/CardScan — DYMO File Software](#)

DYMO is a division of Newell Rubbermaid, a \$6 billion company, and the vendor is targeting the SOHO (small office home office) market through retail distribution. Its primary focus has been on the distribution of label maker devices, and DYMO File Software is designed to work with the vendor's desktop label maker.

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### [eFileCabinet — eFileCabinet](#)

eFileCabinet was established by James Blaylock, CPA back in 2001. Therefore, with this product, you have leadership from someone who understands the accounting and tax business.

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### [CompuLink Management Center, Inc. — Intuition Pro](#)

We reviewed the robust Laserfiche 7 in our document management systems review in the June/July 2008 issue. Intuition is a separate solution that is designed for sole practitioners.

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### [Fujitsu — Rack 2 Filer](#)

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success is being leveraged to extend document management capabilities to those product lines.

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## Office Tools Pro — Office Tools

### Pro

The Office Tools Pro document storage system is designed as a component of a very tightly integrated suite of office automation applications that includes time & billing, scheduling, contact management, and more.

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## REDGEAR Technologies — ArkWorks

REDGEAR Technologies offers a complete set of applications for accounting and tax practices that includes tax, general ledger and document management solutions. The company was founded as TaxWorks more

than 35 years ago and is still owned and managed by the same core group.

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## Speedy Scan Company, Inc. —

### Speedy File Brander

Speedy Scan has been developing document management software for small businesses since 2003 as a Microsoft Master Developer. Their products are designed as horizontal solutions that meet the needs of multiple industries.

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## ShareFile For Accountants — A File Exchange Portal

SIDEBAR ARTICLE: s the name implies, ShareFile is a tool for organizing files and sharing them online internally and externally with clients. For all practical purposes, it is a file storage tool with virtually no functionality relative to document management such as scanning, annotation or integration.

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