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Management Systems

FileVision

is perhaps the one product in this review that most closely resembles a content management solution.

Usability:

The scope of modules available includes enterprise content management, intelligent capture, business process automation and knowledge management. Together they make up a sophisticated suite of tools that are more than the typical small practice will be able to leverage.

The emphasis in the knowledge and relationship management modules results in an interface for the document management module that is not as intuitive as the other products reviewed. The upside is that you can establish a comprehensive content management solution.

File Organization/Management:

FileVision uses a database/folder/sub-folder/document hierarchy. The left side of the screen displays this hierarchy along with a window for entering keywords upon which to search. The document hit list appears on the right side of the screen and incorporates a unique color-coding scheme to help you quickly identify documents according to your established coding criteria. The Document Details window displays extensive data about the file including all of the indexing metadata, version history, security settings, retention policy and links to related documents. The Document Search window provides a multitude of alternative ways to search for documents.

Integration:

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forms that can be accessed through a toolbar button. A workflow feature is also available for establishing rules-based automatic document routing.

Relative Value:

FileVision is priced starting at \$8,500 for a pre-configured three-user system. Additional user licenses and modules are priced a la carte. FileVision is a sophisticated system that may be more than the typical small accounting and tax practice is prepared to take advantage of.

2009 OVERALL RATING:

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