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John Higgins • May. 28, 2012



Document Storage to the Cloud.

From the June 2012 issue.

This is the second part of our two part series on document management and document storage solutions for accounting and tax practitioners. I provided a review of the more comprehensive document “management” systems in the May issue. In this issue we are focusing on the document “storage” systems.

There is not a bright line that distinguishes the two categories. The primary

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focus on delivering their solution through the cloud, aka internet. Some of the vendors offer pure SaaS (Software as a Service) offerings that are 100% based in the cloud. Others offer the option for an “on premise” deployment or via the cloud.

There are some vendors who have not yet developed a cloud based option, but even they are chomping at the bit to get there. All of the vendors seem to have a clear understanding that this is the direction the market is moving in. And they can't seem to get there fast enough. The pressure to “come through the cloud” will become even more intense as the number of iPads and other tablets continue to permeate the accounting firms.

The current paradigm for getting documents to the iPads and other mobile devices is predominantly based in moving files from the firm's network servers to a third party cloud storage service such as DropBox, Box and SugarSync, to name a few. The users then connect to the cloud service to download and upload their files to/from their tablets, primarily in a PDF format. So the opportunity for the DMS vendors is to develop their system to be able to eliminate the third party cloud storage as the intermediary. Some vendors are further down this path than others.

I am convinced that tablet devices will become a key ingredient in the paperless practice model over the next few years. The mobility of these devices and the touch interface makes these a much more natural substitute for paper based documents, as compared to working with documents on a traditional PC using the keyboard, cursor keys and mouse. It will be interesting to see how this market evolves.

The document storage systems have a lot more to offer beyond the cloud and tablet applications. In this review I focused on new features the vendors have added to their solutions over the past year, as well as some of the perennial features including the user interface, integration with tax and accounting software, integration with MS Office applications, availability of a portal solution, PDF print driver, a cloud based

option and more. We are continuing with a format we started to use last year

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The beauty of the internet age is you can easily research half dozen solutions in a single day without ever leaving your office. I hope you find these reviews helpful. Please do not hesitate to contact me directly if you would like to discuss any of the solutions in further detail. I have been authoring these reviews for CPA Practice Advisor for the past seven years, so I am getting a pretty good handle on the various vendor solutions. Enjoy!

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