#### **CPA**

### Practice **Advisor**

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#### 800-98-THINK

### www.computhink.com

ViewWise is a horizontal document storage solution that is designed to be deployed in many different industries.

## **Core Functionality**

The interface uses a common design, with a toolbar along the top and a Windows Explorer-like folder display for organizing the files along the left side. The storage hierarchy is based on a cabinet > drawer > folder > sub-folder model that is completely configurable.

There are several ways to get content into ViewWise. There is a print driver to convert output to a TIFF file format, which the ViewWise software can convert to PDF on output (email, export, and web access). The files generated are stored in a print file folder as a temporary place holder, and then you can move them into the proper destination folder. Electronic files can also be saved directly into ViewWise, including Excel spreadsheets, PowerPoints, CAD drawings, project files and more (includes more than 400 file formats). You can drag and drop these files from Windows to create new documents or append them to an existing file. Users can also use many of their existing standard copiers or scanners, saving directly to ViewWise using the scan drivers or copier integrations they provide. 4.25

### Integration

You can use a database lookup feature to develop integrations with other software applications. A "Save to ViewWise" button is available in all of the MS Office applications that allows you to save files directly into ViewWise. You can create new

folders during the save process. You can launch the Office applications from within

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format, and an OCR conversion tool will convert documents to readable text. 4.75

## **Advanced Functionality**

An audit trail tracks over 30 different types of activities. The system administrator can generate an audit trail by filtering on multiple attributes and print or save the report in HTML format. Additional reports include a user connection log, listing of locked documents that are checked out for editing, deleted documents in queue to be purged, and a listing of all document redactions.

A retention module is included that lets you archive based on an index value, e.g., client name. An archive date can be assigned to each document, and you can archive manually with a file backup option where ViewWise puts the archived files into an encrypted format with a proprietary, but freely distributable, file viewer.

You can search on any combination of the index values. An advanced search capability allows for full text search through a built-in OCR module and will highlight pages and documents in green that match the search condition. You can also search on comments that you have added to a document.

Additional advanced features include version control of file revisions, granular permission settings, and a web access module that lets you search documents through a browser. SDK (software development kit) and "Application Enabler" modules are available to create custom integrations with other software applications. 4.75

# **Summary & Pricing**

ViewWise is perhaps the most comprehensive system in this group of products and can compete with some of the document management systems reviewed in last

month's issue. The depth of features and functions come at a starting base price of

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