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Document Management Systems

Doculex Goby Capture (Doculex) is truly a solution targeted towards a horizontal marketplace. The vendor's website identifies 13 separate industries that it targets, ranging from accounting to defense. This broad market approach requires a solution that is deep in features and functions that can be adapted to different situations. Doculex is appropriately classified as an enterprise-level system and is not accountant-centric, per our standard.

Installation & Configuration — 4 Stars

The system is designed to be installed in a typical SQL server environment. A hosted option is not available at this time.

User Interface — 5 Stars

The interface is made up of two primary components: Profiler and Monitor. Profiler is the end-user tool for assigning the metadata (indexing values, etc.). The Monitor application resides on the file server and will automatically monitor and process documents for storage that have coversheets (electronic) attached to them. The interface is very visual and flexible. You can define the columns of information you want displayed as a result of your search commands and point-and-click

to arrange the sequence of both the columns and rows. You have three options for displaying documents: text format (including index values), native viewer application (view only) and the native application (full edit capability). The searching capabilities are very strong.

Integration — 4 Stars

All of your document index values can be imported with the use of *.CSV files, thereby allowing you to develop integration with many different third-party

programs. Direct integration with MS Word and Excel is provided to index and

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support service organization is open from 8:00 a.m. to 8:00 p.m. daily.

Workflow & Document Tracking — 4 Stars

The features available to tag data to documents is one of the strongest features of this system. This capability can be very beneficial in establishing your paperless workflows for any application, from tax, assurance, administration, etc. For example, you can create customized “bubble sheets,” such as a tax engagement routing sheet, and populate it with virtually any type of document index tag. This sheet can be filled in as the document is routed through your office. This includes the ability to manually write in the entries, and they will be interpreted by the software as part of the scanning process. An additional workflow feature is the ability to organize documents by what needs to be done with each document (i.e., gather client data, assemble, e-file, etc.).

Security — 4 Stars

The system maintains a detailed activity log for each document/file that tracks the action, user and date. Permissions are established at the group level, including controlling what documents can be viewed and what actions can be taken.

Pricing — 4 Stars

The base license fee starts at \$3,995 with an additional fee of \$1,000 for each pack of five-user licenses for accessing the system through the web search feature. Annual maintenance is 20 percent of the license fee.

Relative Value — 4 Stars

Doculex is a viable solution for firms looking to deploy an enterprise-level solution. What it lacks in terms of accountant-centricity it makes up for in terms of the overall depth and scope of features and functions.

2006 Overall Rating — 4 Stars

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