## **CPA** Practice **Advisor**

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# From the June/July Review of Document Management Systems

Computhink falls in the category of "horizontal" DMS solutions that have the flexibility to meet the needs of many different industries including banking, healthcare, education, manufacturing, government and financial services. There are two primary DMS product offerings available: The Enterprise Solution for larger organizations and The Paperless Office small business solution, which offers the same feature set but packaged at a reasonable price for smaller organizations.

If you visit the vendor's website at www.computhink.com/about\_us/compliancy.asp, you will find a link to a helpful recap of leading compliance standards including SOX 404, HIPPA, Gramm-Leach Bliley Act and more.

## Usability — 5 Stars

I appreciate how intuitive the interface of this system is for storing, retrieving and viewing documents. The model used to organize files is a series of file cabinets that you establish. Each cabinet contains multiple drawers, each drawer contains multiple folders and the folders contain the individual documents. The system is very easy to navigate. You have the ability to define the indexing or metadata values according to your needs at the cabinet, drawer, folder or document type level. For example, if you establish a document type for AP invoices, you can establish the index values to be vendor, invoice number, date, etc. Furthermore, indices can be auto-populated by parent/cabinet folders to reduce data entry for same document types to one location. This gives you maximum flexibility

to organize your documents to meet your business processes.

Document searches can include Boolean logic; for example, you can search all

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password.

## Scanning — 4 Stars

Computhink is designed to support scanning of documents in batches and then file them either manually or through the "Eyes and Hands Connector" module that can be set up to capture the indexing metadata directly from the document or file. A virtual input tray allows you to scan a batch of documents in and then index the documents as a group by establishing default values. OCR processing is done at the server after the document is indexed and filed.

#### Integration — 4 Stars

ViewWise is a horizontal solution that lacks some of the direct integration with tax and accounting packages that accountant-centric applications offer. However, Computhink is planning to release a "screen scraping" technology that can be used to automate the indexing of files and documents from various sources. Integration with MS Office, including Outlook, is accomplished through a direct interface button that allows you to save and retrieve Office files directly to/from ViewWise. The Outlook interface is designed to store e-mail messages and any file attachments as a single document; however, you can unbundle the attachments if you prefer.

## Workflow Tools — 4 Stars

The nature of the workflow functionality provided in ViewWise is based on a document routing feature that lets you set up automatic routing based on the folder and the document type. You can establish a sequence of individuals to whom a document gets routed, and it can be moved from folder to folder as appropriate.

You can also activate an e-mail notification for documents that are routed. In terms of routing a bundle of documents as a binder, this can be accommodated by the functionality that lets you combine multiple file types into a single

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#### Technology — 5 Stars

ViewWise is a true DMS solution from the perspective that the documents are stored in either a SQL or Oracle database, which provides the capability to program advanced document management functionality. The system is developed in the .NET platform. Computhink does not provide a hosted solution; however, this option is available through selected resellers.

### Pricing/Overall Value — 4 Stars

The pricing for ViewWise starts at around \$8,000 and scales up depending upon the combination of modules implemented and the number of users. This is a reasonable

pricing model for a system with the depth of functionality that ViewWise brings to the table. Overall, the system offers a robust set of features that allows you to implement an enterprise-level DMS solution.

#### 2008 Overall Rating — 4.5 Stars

Technology

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