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Jul. 25, 2008

*From the August 2008 [Review of Document Storage Programs](#)*

We reviewed the robust Laserfiche 7 in our document management systems review in the June/July 2008 issue (see [www.CPATechAdvisor.com/go/1966](http://www.CPATechAdvisor.com/go/1966)). Intuition is a separate solution that is designed for sole practitioners. This package is sold only through the company's website, and it is designed for a single user with no network option available. The benefit of this structure is that you eliminate all of the issues associated with administering a multi-user system. Those with multi-user requirements should consider the vendor's Laserfiche product.

**Usability – 4 Stars**

Intuition displays a folder list on the left side of the screen and a hit list of documents matching search criteria in the top right corner. A preview of the selected document is displayed in the bottom right section of the screen. When you search for text in a document, the document will be opened and the display will jump to the first occurrence of the search text in the document. This is a big advantage of storing files in the TIFF format rather than PDF. A file backup feature called "Briefcase" facilitates backing up the entire Intuition repository.

**Document Organization – 4 Stars**

The system emulates the Windows Explorer model for document organization with folders and sub-folders and the ability to configure the folder structure. You can drag and drop existing Windows folders into the Intuition folder structure. The template function allows you to enter metadata specific to the document

type for more expedient searching. Document versioning is supported if you choose

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Documents can be scanned directly into intuition, and they will deposit into the folder you have currently selected. You can also scan in batches of documents and save them as separate files across multiple clients.

#### **Annotation – 5 Stars**

All of the scanned images are stored as TIFF files. This facilitates the use of a proprietary viewer with annotation tools. You can apply highlights, redactions, stamps and sticky notes to a document as an overlay. This means you can distribute the documents with or without the annotations and can keep the images in their original state, which is a requirement of financial advisors.

#### **Overall Value – 4 Stars**

If you keep in perspective that this system is designed for the sole practitioner, it has a wealth of functionality for the price of \$1,495. The vendor offers a bundled solution that includes a scanner for \$1,995 with the Visioneer Strobe 450 scanner, which provides one-button scanning. Four hours of implementation consulting is included in the price, and an online knowledgebase of articles, videos and user guides is available.

#### **2008 Overall Rating: 4 Stars**

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