

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

# 2007 Review of Document Storage Systems

Document Management vs. Document Storage Systems: Part II What's the best choice for your practice?

Dec. 01, 2008

*From the August 2007 Issue*

This is the second half of our Document Management vs. Document Storage Systems review. In the June/July 2007 issue, we painted a picture of the document management and storage systems landscape. In that article, I provided an in-depth explanation of the important attributes to consider when selecting a document management or storage solution. If you haven't read that article yet, I strongly recommend you go back and read that article as a primer for the material covered in this review. You can see it at [www.CPATechAdvisor.com/go/1588](http://www.CPATechAdvisor.com/go/1588).

The focus of this particular review is the category we refer to as document storage systems. What characterizes the software applications in this category, generally speaking, is a more limited scope of features and functions. Perhaps the simplest characterization of these systems is that they are designed to provide an alternative to using the Windows Explorer folder and subfolder file management system. Document storage systems are designed to provide a more functional interface for organizing electronic files. As a point of observation, I have to say that I am surprised that Microsoft hasn't stepped up to the plate

to provide more robust document storage functionality in the new generation of Windows applications (Vista and Office.) It seems like such a natural progression of the functionality of these applications. In the absence of such a step forward on the part of Microsoft, these vendors are filling the void quite nicely.

So

back to what document storage systems are all about. Perhaps the best way to illustrate the difference between document management and document storage systems

is through the feature comparison table on this page. [Important note: The delineation

between document management and document storage systems is not black and white.

Therefore, the characteristics outlined on the accompanying chart are generalizations.

Exceptions with any particular vendor solution may apply.]

### Executive Summary

- Document storage systems provide a simple and low-cost option for sole practitioners and small firms to organize their electronic files.
- The primary distinction between document management and document storage systems is that the former are designed to facilitate truly paperless workflows and the latter are primarily designed to enhance your ability to file and retrieve electronic documents and files.
- Document storage systems typically don't include

Based on the feature comparison table presented here, the attributes we have focused on reviewing for the document storage systems include the following: usability, document organization, annotation capabilities, integration and records management features. Usability refers to the overall design of the system — how intuitive and easy-to-use the interface is. Document organization addresses the design and functionality of document indexing capabilities. Generally speaking, the greater the depth of indexing functionality, the higher the rating. Annotation capabilities refer to the ability to make electronic notes, stamps and tick marks on the document images.

Basically, there are two alternative approaches to annotation functionality: proprietary features embedded in the document storage system or through reliance

advanced scanning, portal or workflow automation tools, unlike the document management systems.

- The simplicity of document storage systems means that you can likely do your own installation and training.
- Pricing for these applications is typically less than \$200 per user and in some cases much cheaper.

on Adobe Acrobat's annotation functionality. The latter is typically the case with these systems. Integration addresses the functionality to file and/or retrieve documents from within other applications (i.e., MS Office, Outlook, tax, audit or practice management software). Records management features include security controls, rules-based automatic document retention/purging, and system activity audit trail reporting. Document storage systems generally have limited functionality in the records management features, but there are certainly exceptions, and they have been duly noted.

A final reminder before we get into the individual product reviews. The distinction between document management vs. document storage systems is the depth and breadth of functionality. The document storage systems are generally simple in their design to help facilitate the organization of electronic documents and files. Therefore, you'll need to evaluate the product reviews from that perspective. If you are looking for a more comprehensive document management solution, I refer you back to the document management systems review in the June/July 2007 issue.

---

## Drake Software – Drake Document Manager

Drake Document Manager was introduced in 2005 as part of Drake's tax software and is provided free of charge with the vendor's tax software package. The Document Manager system is fully integrated with the Drake tax software so that tax returns can be published and filed directly from the tax software.

[Read Full Review](#)

## Easy Data Access – Docsvault

### Small Business Edition

Easy Data Access began the development of Docsvault in 2003 with the goal to provide small to medium-sized businesses with an affordable paperless office solution that can be utilized to transfer a business' paper files to a centralized and organized digital filing system.

[Read Full](#)

[Review](#)

## Fujitsu – Rack2Filer

Rack2-Filer is a document storage system that was developed by Fujitsu, one of the leading manufacturers of high performance scanners, to accompany its ScanSnap “one-touch” document scanner.

[Read Full](#)

[Review](#)

## Intuit – ProSeries DMS & Lacerte DMS

These two products are essentially the same. One is designed to integrate directly with the Intuit ProSeries tax software, and the other version integrates with the Lacerte tax software.

[Read Full](#)

[Review](#)

## Office Tools Pro

Office Tools Pro is a unique entry in this field of products reviewed in that the document storage functionality is a component of a more comprehensive collection of office automation tools that includes contact management, project management, time and billing, as well as document management.

[Read Full](#)

[Review](#)

## TaxWorks — ArkWorks

ArkWorks was initially released in January 2006, making it one of the newest products in this review. It is designed primarily to work with the TaxWorks tax preparation software, but can also be used as a stand-alone document storage system.

[Read Full](#)

[Review](#)

## Thomson Tax & Accounting

### — FileCabinet CS

FileCabinet CS is designed specifically for tax and account-ing firms and delivers the greatest value when used with the Thomson Tax & Accounting CS suite of professional products.

[Read Full](#)

[Review](#)

[Drake Software](#) • [Intuit, Inc.](#) • [OfficeTools](#) • [TaxWorks by Redgear Technologies](#) • [Article](#)

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2023 Firmworks, LLC. All rights reserved