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the August 2007 Review of Document Storage Systems

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.

Usability — 5 Stars

The user interface for Office Tools Pro is very comprehensive. It may take a little time to get familiar with all of the functionality, but, once you do, the program offers a lot of functionality from a single screen. The design of the main application screen lists the basic client contact information at the top, followed by a series of tabs to access all of the various applications built into Office Tools Pro. The center of the display provides a hit list of the documents and files associated with the selected client. The bottom section of the screen displays a personal work list for each staff of all uncompleted tasks.

Document Organization — 4 Stars

Files are organized into folders and categories. What makes Office Tools Pro a little different in this regard is that the relationship between the folders and the categories is not hierarchical, therefore you can search for documents at the folder or category level.

Annotation — 3 Stars

Annotation is handled at the application level, i.e. Adobe Acrobat.

Integration — 4 Stars

Integration with the other Office Tools Pro applications is seamless as a result

of the integrated design of the system. Accessing a document related to a particular

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Records Management — 4 Stars

The Office Tools Pro system maintains a history of all the activity associated with a document. You can mark a document for archive or for deletion. Documents can be archived to an alternative media and/or destroyed based upon a set of data values (i.e., document category and document date). The system can generate a document retention report that will list all files that are scheduled for deletion based upon your defined criteria.

Relative Value — 4.5 Stars

Office Tools Pro is uniquely positioned to be a complete practice management and document storage solution for sole practitioners and small firms. As described in the review, it has a wide range of features that cover client contact information, task management, time and billing, document storage, and more. The depth of functionality in each of these applications can be sufficient for the small firm. So if you're looking for something that offers more, Office Tools Pro is worth a serious look. Pricing starts at \$550 for the first user and \$175 for each additional user. If you want to purchase the document storage features only, the cost is \$350 for a single user (\$100 for each additional user). The annual maintenance fee is 35 percent of the license fee and includes free technical support as well as updates and upgrades to the program.

2007 Overall Rating: 4 Stars

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