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suite of applications that are bundled into one complete package. In addition to basic document storage capability, OTP provides the following applications: contact manager, calendar, project management, time tracking and billing. You can use OTP document storage features on a stand-alone basis, but the real value of this application is the integrated bundle of applications. See the 2009 review of this product in the [practice management review](#).

From the June 2009 Review of [Document Storage Systems](#)

USER INTERFACE:

The nature of the OTP interface is a comprehensive dashboard that provides direct access to all of the integrated applications. The toolbar displayed along the top provides one-button access to the desired application, i.e., contacts, time entry, etc. A contact/client list is displayed along the left side of the screen to pick the account with which you want to work. The bottom of the screen displays your task list. The center window displays the application view: calendar, timesheet, document storage, etc. For all of the functionality that is bundled into this application, the designers have done a very effective job of keeping the system easy to navigate.

DOCUMENT/FILE ORGANIZATION:

The document storage interface is pretty simple and straightforward. As mentioned above, the client/contact list is displayed along the left side of the screen. Once you select the designated client, then the document management window displays a list of all of the files associated with that client. Each file is tagged with the file name, year, project, category and staff. Therefore, these are the parameters that you can use to find a particular file by sorting and/or filtering on the appropriate column.

INTEGRATION:

The core strength of OTP's integration is within the applications that are bundled

with the system. Beyond that, there is an MS Office add-in that lets you save files

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attachments or as links to a portal site from within the program. The portal service is an additional cost and starts at \$20 per month for 5GB of storage and no limits on the number of users or clients. There is no direct integration with tax software.

OVERALL VALUE:

For firms that position themselves to take advantage of all or at least a majority of the integrated OTP functionality, the value proposition is compelling. If your intent is to use only the document storage feature, then you're forgoing a lot of the benefits. OTP continues to grow in its capabilities as a small enterprise solution. It is currently built on a SQL platform with an MS Access front-end interface. The vendor has announced its plans for a new release during the last half of 2009 that will be built on the .NET platform. The bottom line is that at a price point of \$1,500 for a five-user license and \$250 for each additional user, this is a good value if you take advantage of what it has to offer.

2009 OVERALL RATING:

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