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## ArkWorks

is developed and distributed by REDGEAR Technologies, the producers of TaxWorks professional tax preparation software. In my opening remarks to this review section, I made the point that the line that separates document storage systems from document management systems is not black and white. ArkWorks is a prime example of this. The overall features and functionality provided put this at the top of the class. Even though some of the other products reviewed here offer excellent functionality on a niche basis, based primarily on specific integration with a particular tax package or QuickBooks, ArkWorks provides the most robust solution that is designed generically to work well with any given tax package.

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

### USER INTERFACE:

The starting point for ArkWorks is a “Getting Started” menu that provides an easy-to-follow list of features to be guided through. Once you enter the system, you are prompted to choose a cabinet type that organizes documents and files into distinct databases, i.e. clients, firm documents, etc. The toolbar displayed across the top includes File, Edit, Document, Tools and Help commands. A list of client names is displayed along the left side, with the ability to search for clients. Once you select a client, the file folder structure will display along with a list of files that identifies their specific folder location. This provides the best of both worlds; you can view a single comprehensive list of all files and yet keep them organized in individual folders. I wish Vista could do that.

When you select a file, you can right-click to view a number of functions to perform on that file, such as view, email, print, rename, delete, move, send

to CD, view audit trail, add notes and check out the file for editing. A thumbnail

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ArkWorks compresses all files that are stored by approximately 50 to 70 percent of their original size. The files are also stored with 128-bit encryption to provide enhanced security.

A "re-file" option facilitates moving a file to another folder or drawer. A red checkmark is placed next to any documents that are currently checked out by someone for editing. This alerts others that they can view the file, but will not be able to edit them. A file retention feature is provided that allows you to assign a "maturity date" to each file that facilitates deleting files at the end of their defined life cycle.

#### **INTEGRATION:**

ArkWorks offers direct integration to the TaxWorks tax preparation software to file tax returns directly into the appropriate client folder. The scanning functionality allows you to access and control scanning settings for any TWAIN-compliant

scanner from within ArkWorks. Emailing of documents from within is enhanced by the ability to establish a password and permission settings for PDF files at the time the email is composed. These permission settings include limiting annotations, preventing extraction of content from the PDF, preventing changes to the file and disallowing printing. If you are familiar with Adobe Acrobat's security features, you will realize many of these settings are the same.

#### **OVERALL VALUE:**

In addition to the features and functions described above, ArkWorks offers a comprehensive document activity audit trail, file encryption for extra security, extensive user permission settings and "quicksets" to facilitate filing documents with minimal keystrokes. Pricing is \$995 for the first five users, plus \$50 for each additional user. The annual maintenance fee is \$395,

plus \$25 for each additional user beyond the initial five. The overall value

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