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TECHNOLOGY

2012 Review of RedGear Technologies — ArkWorks

May. 28, 2012

RedGear Technologies — ArkWorks

800-230-2322

www.taxworks.com

Best Firm Fit

ArkWorks is a very basic document storage system that helps you organize and search for files in a more user friendly format as compared to Windows Explorer. The only application it integrates directly with is the TaxWorks tax preparation software. The best fit is for firms that use TaxWorks.

Strengths

- Intuitive file navigation interface based on a cabinet, client, folder structure
- Print to ArkWorks PDF print driver to print and save reports and documents directly to a client folder
- Ability to email multiple files as a zip file directly from ArkWorks
- Direct integration with TaxWorks to save tax returns directly to the client folder

Potential Limitations

- No portal application available to share client files online
- No integration with MS Office to store and retrieve files directly to / from ArkWorks

Features Overview

- File storage model is based on a cabinet, drawer, folder, document model
- The built-in PDF print driver lets you print documents and reports directly to PDF format and file them directly into ArkWorks.
- The system includes a proprietary PDF viewer with built in annotation tools, including a redaction feature to block selected document content from viewing for privacy control.
- Select multiple files from the document hit list and right click to email as an encrypted zip file.
- There is no direct integration with MS Office applications. Therefore, you have to use a drag and drop process from Windows Explorer to place the file in ArkWorks.
- Direct integration with TaxWorks tax preparation software will automatically send a PDF copy of the tax return to the current year tax folder for the client.
- Audit trail features reports on who accessed the individual files.
- Security administration feature controls access into four groups; everyone, administrator, basic and restricted. Each of these groups can be assigned very granular permissions.
- Scanning feature facilitates scanning directly into ArkWorks through an “inbox” feature that allows you to scan multiple documents at one time into a designated client drawer. You can setup an inbox for each client and then select the appropriate inbox to scan directly into.
- A document retention feature lets you assign a “maturity date” to track the timing of a document’s status for the archiving utility to moves expired documents to a CD for offline storage.
- You can set a document maturity date to manage expired documents. At scheduled intervals a popup window shows you the documents that have expired and prompts you to reassign the maturity date or export and delete the file.

Summary & Pricing

ArkWorks is a good basic document storage system. It would be helpful to see them offer a cloud based option in the future to meet the needs of the changing market place. Direct integration with the MS Office applications would also be a welcome addition. A cloud-based version of ArkWorks that will include integration with MS Office applications is slated for completion in Spring 2013. The integration with TaxWorks is the primary value driver for this program. Pricing starts at \$595 for a single user and \$150 for each additional user. A bundled option of \$995 for 5 users is available. The annual maintenance fee and support fee is \$150 for one seat.

Technology

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