CPA
Practice Advisor

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www.ark-works.com

ArkWorks is designed to serve as an integrated document storage solution for the TaxWorks tax prep software. ArkWorks is also marketed as a standalone product, which is compatible with all tax and other software programs. The company noted that 40 percent of its current ArkWorks customers are non-TaxWorks users.

Core Functionality

ArkWorks' value is based in its integration for TaxWorks users. The interface is pretty straightforward and intuitive. Files are organized using the cabinet > client > folder > sub-folder model. The client list displays along the left side of the screen with the selected client's folder structure along the top, along with a thumbnail preview of the currently selected document.

You can establish a unique folder template for each cabinet, i.e., clients, vendors, HR, etc. You can lock the folder structure so that individual users cannot change them in order to provide greater consistency in your document organization.

An ArkWorks PDF print driver generates PDF documents from any Windows application and will display a "Save Document" window to select the appropriate cabinet, client and folder to which to save the document. A feature called QuickSet lets you pre-define the folder/subfolder and the document title associated with specific document types to streamline the file saving process. 4.75

Integration

The integration to TaxWorks is embodied in a toolbar button that will save the currently displayed tax return to the appropriate client folder in ArkWorks. You can

also drag and drop files from Windows Explorer to ArkWorks, and you will have the

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highlights, comments and redaction. There is no OCR convertor, which means you cannot perform full text searches. 4.5

Advanced Functionality

ArkWorks provides more than 20 individual permission settings to control access at the group or individual level, including the ability to secure an entire cabinet or client from specified users and groups. Documents are automatically saved with 128-bit encryption when they are imported into ArkWorks.

Document archiving is supported by assigning a "maturity date" to track document expiration dates and to facilitate scheduled purging according to your retention policy. A reports manager will list expired documents that have reached their maturity date. You can choose to delete the expired files, assign a new maturity date, or burn them to a CD and then delete them.

In the document properties, you can access an audit trail of the document's activities and enter document-specific notes and keywords by which to search. 4.75

Summary & Pricing

ArkWorks packs a lot of functionality into a document storage program for the market to which it is targeted. When you use it in conjunction with the integrated TaxWorks tax prep software, you have a solid foundation for establishing a paperless tax prep workflow. Pricing is $595 for a single-user version and $995 for a five-user network version. Each additional user license is $50.

2010 Overall Rating 4.75

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