Personable Document Management Suite 2013

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www.personable.com

From the July 2013 review of Document Storage systems.

Best Firm Fit: Firms who work with the desktop version of QuickBooks, as well as those who would like to set up workflow processes within the firm as well as with clients.

Strengths

- Offers integration with Outlook, Windows Explorer, and QuickBooks.
- ScanWriter OCR capabilities have a great deal of promise, however, document type templates must be downloaded from Personable and selected when scanning for effective classification of forms and statements.
- Includes tools for annotating and editing PDF files without users having to purchase Adobe Acrobat.
- Documents can be scanned to a "TurboFolder" (inbox) where they can be accessed from the SourceLink toolbar within QuickBooks or from within Workflow DMS.

Potential Limitations

- The initial configuration of SourceLink workflow and ScanWriter OCR may require some effort and assistance.
- User level security and archival capabilities are very limited.

Overview

Personable is an Intuit partner which has created the Personable Document

Each user has an "inbox" of items to be acted upon, and e-mail alerts can be sent automatically with an organization's outbound e-mail (SMTP) server.

Documents can be scanned with the Company's $495 ScanWriter 160 scanner or using any scanner which has drivers which comply with the TWAIN or WIA standards.

Existing scanned documents can be imported into the system by drag and drop from Windows Explorer or using an import menu. Imported documents are fully indexed, and users can search for words within the document using the document management system.

Data is stored in a standard Windows folder structure, and documents can be moved to storage locations or to other inboxes by dragging and dropping in the application window.

Documents are typically organized based on its location in a single file structure instead of based on multiple index fields. The file name can be used to store and retrieve key information about a file, and there is a simple workaround to create multiple keyword fields associated with stored documents.

Although Workflow DMS can be used with any Windows-based accounting system, the real value of Workflow DMS is realized when an organization uses the entire suite, including Workflow DMS, Personable's ScanWriter OCR text recognition application, the SourceLink workflow/document linking application, and the ScanWriter 160 scanner.

The suite provides some capabilities for importing data from OCR text recognition and routing documents for approval which are not available in most other document storage systems.

Summary and Pricing

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dedicated servers in a Southern California commercial data center, and pricing for this service is available upon request.

2013 Ratings:

Core Product Functions/Features: 4.5 Stars
Integration/Data Export/Import: 4.25 Stars
Advanced Functionality: 4.5 Stars

Overall Rating: 4.5 Stars

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