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## 2010 Document Storage Review

By John Higgins, CPA.CITP

Are you thinking about going paperless? If so, you will find this review of electronic document storage solutions for accounting and tax practices to be a helpful resource to shortcut your process of researching potential solutions. In last month's issue, we reviewed a series of document management systems (see [www.CPATechAdvisor.com/go/XXX](http://www.CPATechAdvisor.com/go/XXX)). So your first question is likely to be, "What's the difference between document **management** and document **storage**?" And that's a good question!

The primary distinction between document management and document storage solutions is the breadth and depth of functionality. Document management systems are designed as comprehensive enterprise solutions for automating the capture, storage and dissemination of all electronic documents and files in an organization. I recommend that you go back to last month's issue of CPATA and read about the specific features and functions of document management systems and the individual product reviews so you can compare and contrast the two groups.

The document storage solutions that we are reviewing in this issue typically have a more focused set of features and functions, which are often targeted to a specific niche such as direct integration with a particular tax prep package, integration with QuickBooks, or providing a secure file sharing solution. So you should read each of the individual product reviews carefully to help you gain a better understanding of the core strengths that each has to offer.

The specific attributes that we have evaluated for each product are organized into three fundamental categories: core functionality, integration and advanced

functionality. The core functionality focuses on the overall user experience, based

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I hope you find these reviews helpful and encourage your feedback. I have been writing these reviews for CPATA for the past four years, and I am always interested in learning what information you find helpful. We have revised our review process this year in a way that we believe helps us to compare the products more consistently, with the realization that every product is unique. n

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