

► **SNAPSHOT**

Document Management vs. Document Storage Systems

FEATURE/FUNCTION	DOCUMENT MANAGEMENT SYSTEMS	DOCUMENT STORAGE SYSTEMS
User Interface	Customizable and more complex due to expanded capabilities.	Intuitive and easy to work with due to simplicity of design.
Document Organization	Robust functionality to establish multiple document indexing (meta-data) models that can be applied based upon the nature of the document/file.	A more intuitive folder/sub-folder model for organizing documents. Typically one standard model applied to all documents/files.
Scanning	Include or directly interface with advanced scanning applications that can "clean up" scanned images, provide batch scanning functionality and "intelligent" scanning features that can capture/transfer data from scanned documents to auto-fill application data fields, i.e., transfer data from a scanned W-2 form directly into the 1040 software.	Typically limited to receiving scanned images directly from the scanner software or Adobe Acrobat. Unlikely to support a batch scanning mode.
Annotation	Include either proprietary annotation tools or relies on Adobe Acrobat.	Usually rely on Adobe Acrobat for annotations.
Integration	May include pre-configured integration with popular tax, audit and practice management software, as well as MS Office and Outlook. Typically include custom integration capabilities through an API (Application Program Interface) or similar tool.	May integrate with MS Office and Outlook. Accounting and tax centric integration usually limited to applications developed by the same vendor.
Records Management	Establish pre-defined rules for automatically purging documents based on the type of document. Granular security settings to control access rights to documents as well as tasks that can be performed on documents.	Access control to document database. May allow more granular access control to documents. Document retention typically not included.
Portal	Integrated one-way or two way portal with potential to distribute real-time information.	Typically not provided.
Workflow Automation	Ranges from simple or conditional document routing to engagement level document binder management with workflow scheduling.	Typically not provided.
Implementation	More complex due to extended feature set and depth of integration into workflows. Typically requires on-site professional services. Leverage best practices from implementation team.	Easy, do-it-yourself model or web-based training/guidance.
Price	\$200 per user and up.	Less than \$200 per user.