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May. 29, 2008

*From the June/July Review of Document
Management Systems*

Cabinet NG has released its latest version of CNG-SAGE (6.0) this past January with major enhancements. They made a significant shift in both the user interface and the technology by moving to a .NET platform and a SQL back end. This alone will provide the capability to continue to enhance the features and functionality of the system.

Usability — 5 Stars

CNG-SAFE utilizes a cabinet-folder-document organization model. Each cabinet is set up to store a particular database of documents such as clients, vendors, employees, etc. Once you select the cabinet you wish to access, the system will provide a three dimensional display of folders. Each folder displays basic properties and provides a gateway into the individual documents and files and can be configured with a unique set of indexing values. You can use a concept referred to as “naming templates” for indexing specific document types automatically. The system displays an Explorer type view of the document hit list and a preview of the document to the right. The user can adjust the size, location and display of the various windows according to their individual preferences. CNG-SAFE provides a proprietary annotation tool called Imageman that enables users to create their own stamps. Searching can be performed across multiple repositories, and conditional searches can be performed, as well.

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Integration — 4 Stars

Cabinet NG does not provide direct integration with tax and accounting software applications. However, an integration tool called Retriever is provided to create your own integrations. You can create a link to display specific types of CNG-SAFE folders and documents from within other applications. Integration with Outlook allows you to file e-mails with attachments or as separate files. A particularly nice feature is to be able to drag and drop e-mails directly into the currently active document folder. A Synchronizer module lets you create links with other applications to update your lists, i.e. clients, vendors, employees, etc.

One particularly distinct feature of the CNG-Books edition is that it can be used as a DMS for all of your QuickBooks (QB) clients. CNG generates two QB cabinets: one for vendors and one for customers. You can create a QB transaction entry from a CNG document or you can link documents to existing QB transactions. CNG-Books can be synchronized with QB to create a vendor and customer list in the cabinet, and you can preview the linked document from within the QB transaction entry screen.

Workflow Tools — 4 Stars

CNG-SAFE's workflow functionality allows you to move individual documents, folders or a group of folders. Pushing the "trace" button displays a trail of who has had the file(s.) You can route files with public or private access. Private means no one can view the document(s) while they're in a workflow; public means you can only view them. You can use rules-based workflows that can be linear (i.e., A to B to C) or based on dynamic/conditional values, or you can simply route manually. You can attach notes to the routed documents

and assign a status setting. E-mail notifications can be sent when a document

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Pricing/Overall Value — 4 Stars

The system is priced at \$995 per user for each named license, or \$1,395 for each concurrent license that can be shared by multiple users. A view-only license is \$495. A base package is available for \$2,500 that includes two named users, the server software, one year of tech support, software maintenance, and four hours of remote installation and training.

2008 Overall Rating — 4 Stars

Technology

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