Jul. 01, 2009

From the July 2009 Review of Document Management Systems

CNG-SAFE
is a "horizontal" solution designed to work in virtually any industry, but the accounting market is one of the vendor's primary focuses.

Usability:
The interface is designed with a series of control panels along the left side of the screen that includes one-click access to a file search window, messages and workflow information. The rest of the screen is dedicated to the document view. The system is available in a web hosted (SaaS model) or in-house solution. The optional Web module offers remote access via a standard browser.

An integrated "ImageMan" module is included to view TIFF files, which can be annotated with the custom tick marks and stamps built-in. You can also choose to work with PDFs and use Adobe Acrobat for your annotations. A particularly appealing feature is that each scanned page is displayed as a thumbnail that you can drag and drop to create a consolidated file based on a template, i.e. 1040 tax documents.

File Organization/Management:
The files are organized into cabinets at the top level followed by folders and tabs within each folder to organize by document type, i.e. correspondence, tax returns, etc. The folders can be customized to track various types of information such as client contact information. When you highlight a document, it is immediately
displayed in a preview window, which is much more efficient than having to download

the file in order to view it. When you store a file, you can apply a "sensitivity"

an application. For example, if you are viewing a client in your practice management software, you can see a list of files related to that client.

Integration with Outlook includes the ability to drag and drop email messages and file them according to pre-established templates that utilize information within the message such as the subject line. For QuickBooks users, there is a plug-in called CNG-Books, which is designed to directly integrate with QB and link documents and files to specific QB transactions.

A workflow module let's you establish document-specific routing based on rules that you establish. For example, you can route documents with specific index values such as a dollar amount level or a tax return to a particular user. You can also route a collection of documents as a group or an entire folder.

Relative Value:

CNG-SAFE is priced at $1,000 per user license. You have the option of purchasing concurrent user licenses at a cost of $1,400 per user. This means that multiple staff members can share the same login. An additional "view only" license option is available for $500 per user. Perhaps the best value is the $100 per user, per month hosted option that includes the server infrastructure and administration services. CNG-SAFE is a well designed EDMS solution that offers a comprehensive set of features and functionality. The fact that the system supports TIFF and PDF file formats provides additional flexibility. The Retriever integration tool is one of its most distinguishing features, in my opinion. If you're offering a client accounting service based on QuickBooks, you should also take a close look at the CNG-Books plug-in.

2009 OVERALL RATING:

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us