Management Systems

If
you were to review the archives of my previous EDMS reviews in this magazine, you would find that I have consistently emphasized GoFileRoom's intuitive, easy-to-use interface.

USABILITY:
The fact that the opening screen displays a virtual file cabinet with dynamic drawers that open and close in an animated fashion is about as intuitive as you can get. When you open a drawer you can enter a combination of index values that you define for that drawer to help you save and retrieve files. For example, you can enter a client name or number, a fiscal year(s) and a document type such as "tax return" to display all of the tax return files for that client for that year or multiple years. When the "hit list" of documents is displayed, you can sort by any of the columns of data displayed. A "right click" menu allows you to directly email a document via Outlook, publish it to the integrated portal, edit, delete it, and more, provided you have the appropriate level of access permission.

FILE ORGANIZATION/MANAGEMENT:
GoFileRoom provides a highly customizable file organization environment. It starts with the file cabinet to which you assign a name. You can establish a virtually unlimited number of drawers, i.e. clients, firm administration, HR, etc. Each drawer can have its own indexing structure for organizing files. For example, the clients' drawer files can be organized by client name, partner in charge, fiscal year, file type, etc., whereas the HR drawer would typically be organized by employee.

You can restrict access to drawers and files using a very granular security

Save commands. Outlook integration is designed to allow you to capture email message data to establish your index value, and you can choose to store the message and attachments as a single msg file or unbundle them and selectively choose the attachment files you want to save or discard. GoFileRoom has unique desktop integration that allows you to drag and drop files from the desktop to GoFileRoom and also allows you to highlight text and initiate a GoFileRoom search from any application (i.e. Quick Launch).

A configurable import utility let's you import your client list from virtually any practice management system, as well as any of the popular tax preparation programs. Direct integration is offered with GoSystem Tax and Practice CS out of the box. GoFileRoom has partnered with Copanion and SurePrep to help with automating the capturing of scanned tax documents.

The integrated FirmFlow module has become one of GoFileRoom's most distinguishing
attributes. FirmFlow lets you establish a workflow for all of your key business processes — tax preparation, audit, accounting services, etc. For each workflow engagement, you create a virtual folder that contains all of the key information necessary to manage and complete an engagement, such as forms to be filed, milestones to be completed, review note tracking, engagement checklist, routing history and more.

The integrated ClientFlow module is a dynamic two-way portal. You can publish documents from GoFileRoom directly with a single click "publish" button, and the file can be removed from the portal by simply unchecking it. Clients can upload files to the portal, as well. And the RecordsFlow module allows the firm to define retention rules to manage the retention (automatic archive or deletion) of documents.

RELATIVE VALUE:

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