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Thomson Reuters GoFileRoom

800-968-8900

cs.thomsonreuters.com/gofileroom

From the **May 2013 review** of Document Management systems.

Best Firm Fit

- Firms who want to have a hosted document management system which is flexible enough for any configuration while being designed to have integrated enterprise security
- Although the application works well for any firm, the application was designed to work with GoSystem Tax RS and has tools which will appeal to large, multi-office firms

Strengths

- Browser-based (IE only) SaaS document management solution which integrates with the CS Professional Suite from Thomson Reuters
- Add-ins for Microsoft Office (Word, Excel, and Outlook) make it possible to save documents from within these applications
- Simple graphical user interface and file cabinet organization for file drawers is easy for most users to understand
- Flexible index fields make it easy to customize each file drawer to meet the needs of almost any firm
- Integrated FirmFlow workflow management application and TaxSort 1040 document recognition software

Potential Limitations

- Product is not available for on-premises deployment, and only supports Microsoft

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traditional features like version control, check-in and check-out, and supports bar-code scanning to help streamline document organization. Workflow and document routing are available using the integrated FirmFlow workflow engine, and documents can be routed to clients using the ClientFlow feature within the optional NetClient CS portals.

Thomson Reuters has built out interfaces which connect GoFileRoom to many CS Professional Suite applications. There are also new integrations to other applications, including SurePrep SP Binder, SurePrep 1040 Scan, and Practice CS project management software. The software is hosted at an enterprise-level data center.

The application has add-ins for Microsoft Office apps, including Word, Excel, and Outlook, which allow files to be retrieved and stored directly from within Office applications. An Adobe Acrobat add-in allows users to edit PDF documents stored in GoFileRoom, enhances support for multiple monitors, and provides users with a calculator.

TaxSort is an automatic document recognition tool which organizes client-provided tax forms into a bookmarked PDF. This tool can be used along with barcoded scanning separator sheets to partially automate client data organization and input. Reusable separator sheets allow supporting documents to be bookmarked with different sections with an Adobe Acrobat file. GoFileRoom performs batch-based optical character recognition on all of the data uploaded, so users can perform word searches on the contents of stored information.

GoFileRoom also allows users to install a control panel application which allows users to set up shortcuts which simplify the process of indexing and uploading documents into the application. Files can be dragged onto these shortcuts, which

associates preselected metadata with each file, and simplifies the process of

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GoFileRoom is a monthly subscription based on the number of users, and starts at \$3,950 per year. Implementation and training are highly recommended, and are priced separately.

2013 Ratings:

Thomson Reuters GoFileRoom	
Core Product Functions/Features	4.5
Document Workflow	4.75
Document Control	4.75
Special Features	4.5
Overall Rating	4.75

Firm Management • Technology

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