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From the April/May 2006 [Review of Document Management Systems](#)

Cabinet NG – Shared Access Filing Environment (CNG-SAFE) is a document management system designed primarily for the SMB (small and midsize business) market. It provides a comprehensive collection of features and functions that meet the needs of this market. CNG-SAFE is targeted primarily at the small firm and is not an accountant-centric solution, per our standard of measure for this attribute.

Greg Crabtree is the CEO of Crabtree, Rowe & Berger, PC (www.crbcpa.net), a 15-employee firm based in Huntsville, Alabama. The firm offers a balance of business consulting, tax services and traditional financial statement preparation to clients throughout the southeast. “Our ability to enhance the profitability of closely held businesses wins us clients over a broad area,” Crabtree says. “And the ability to work remotely has allowed us to maintain a long-term relationship with clients regardless of location.”

Crabtree says they were approached by several vendors about document imaging, but he found CNG-SAFE’s presentation of features to be more thorough with practical solutions to document control. “CNG-SAFE is very logically organized and very simple to use,” he says. “My biggest concern with going digital was the ability to effectively retrieve the information once it was scanned. We had looked at just using Adobe to create folder structures, but that process did not adequately protect files from being deleted or moved by sloppy user actions.” Crabtree says they are currently in phase one of implementation, which is to convert existing files. He expects that phase to be completed this summer, after which they will begin to use the file routing and control features of live projects.

Installation & Configuration — 4 Stars

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User Interface — 4 Stars

My first impression of the interface was that there is a lot of information on the primary display screen. As I learned more about the capabilities the system offers, it quickly became apparent why various content items were appropriately displayed. The benefit is they have provided the user with more opportunities to manage the filing and retrieving of documents. The basic model for document organization is a cabinet | folders | tabs | documents hierarchy. The tabs typically represent workflows, such as tax preparation, audit, etc.

Integration — 4 Stars

CNG-SAFE is designed for a horizontal market, not exclusively for an accountant-centric market. Therefore, there are no direct links to accountant-specific software applications “out of the box.” However, the system does offer the ability to develop interfaces as appropriate through its API (Application Program Interface). Using the API in conjunction with *.CSV (Comma Separated Value) file formats, interfaces can be developed from a practical perspective. Direct integration with MS Outlook and MS Office is provided, and documents/files can be imported directly via the MS Explorer window. More attuned to the specific needs of the accountant market is the company's CNG-Books module, which provides a very unique capability for direct integration with QuickBooks that allows you to link documents to specific transactions. Custom *.PDF annotation tools are provided, thereby potentially reducing the need to provide Adobe Acrobat for all your users.

Training & Support

Cabinet NG provides a comprehensive array of support services ranging from remote

training and technical support to on-site training and system configuration

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inbox. This can be useful in an environment where you have a pool of tax returns to be prepared by a team on a first-come, first-serve basis. You can add workflow notes to documents that are being routed.

Security — 4 Stars

A complete set of security features is provided including user/group-level permissions at the cabinet, folder and document level. The system administrator can establish a “sensitivity” at the folder level that filters who has permission to access the documents in the folder. The system maintains an audit trail of document activity. The files are stored in the traditional Windows file directory structure and can be accessed or deleted without going through the CNG-SAFE software. Cabinet NG recommends that server administrators use standard Windows security practices to prevent unauthorized access.

Pricing — 4 Stars

CNG-SAFE is priced at \$995 per user license with an annual maintenance fee of 20 percent. An optional technical support contract is available for a fee of \$350 annually for five users. A single QuickBooks interface is provided with the base CNG-Books system.

Relative Value — 4 Stars

Cabinet NG provides a strong feature set for the small firm, despite the fact that it is not specifically targeted to the tax and accounting practice. The strength of its document management capabilities is impressive. The QuickBooks link is a bonus feature for many smaller firms that use QuickBooks.

2006 Overall Rating — 4 Stars

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