CNG-SAFE is a document management system positioned for the small enterprise and is designed to work in many different industries. Approximately one-third of the vendor's sales are in the financial services industry, and one-third of those sales are specifically accounting and tax practices. The CNG family of products includes CNG-Books for direct integration to QuickBooks, and therefore offers a practical solution for many of a firm's SMB clients.

Usability — 5 Stars

The user interface is well organized and intuitive. The left side displays a list of cabinets, and selecting a cabinet will display a list of folders in the center of the screen. The folder labels are based on the nature of the cabinet (i.e., clients, vendors, employees, etc.). The indexing model can be configured to be applied to the folders based on the nature of the content in the cabinet.

A preview mode allows for the previewing of a document or file without having to open the native application (i.e. Acrobat, Word, etc.). The viewer supports 280 different file formats. This is a very nice feature in that it allows users to quickly preview and select the document for which they are looking without the extra step of opening up the application. Double-clicking the file will open it in its native format.

Annotation of document images
is accomplished via the proprietary tools that are a part of CNG-SAFE. Markup tools include stamps and text boxes, which may allow users to avoid having to purchase Adobe Acrobat. Document images can be stored in either TIFF or PDF format. Retrieved documents can be viewed, edited, faxed, printed, e-mailed and even routed. The system will keep a history of file revisions to edited documents.

Integration — 4 Stars

Clearly the sweet spot for CNG integration is through CNG-Books, which provides

The system allows users to establish document retention policies that are associated with the document type. The retention policy is assigned to the document at the time it is filed. A list of document types can be generated by retention policy, which allows users to delete documents in bulk, as appropriate. In regards to document security, the system allows users to assign a "sensitivity" class to a document when it is filed. This sensitivity class establishes who has the ability to access the document. The system keeps an audit trail of all of the activity that occurred in the system by user and date.

Scanning — 4 Stars

CNG-SAFE supports direct scanning capture without the need for Adobe. A nice feature is the ability to change the document image format from TIFF to PDF on the fly. In terms of batch scanning, users can scan in a batch of unrelated documents and drag them into their index values individually. Alternatively, barcodes can be scanned onto documents, which will be captured during the scanning process to populate the index values as appropriate.

Workflow Automation — 4 Stars

Users have the ability to establish rules-based workflow for a document, including the process of defining who and how it will be routed. Every user has a document inbox that lists documents that were routed to themselves. The user can accept, reject or hold a document in the workflow. The workflow status can also be viewed in terms of approved, rejected, etc. In addition, the CNG-Forms module can help automate a user's workflow by allowing them to design electronic forms to replace paper documents and make them accessible via the Internet (additional hardware required). The forms can also be signed electronically.

Portal — 3.5 Stars

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$1,595 for each additional user with a $295 per-user annual maintenance fee. A half day of setup consulting is included, as well as two weekly online training sessions. On-site training and support is available for an additional fee.

Summary

The CNG product is a good value particularly for a practice that is primarily focused on using QuickBooks or Peachtree as the tool for client accounting. It is a real good value for SMB organizations. The level of enterprise functionality included in the CNG product line at essentially entry-level pricing makes for an attractive value proposition.

2007 Overall Rating: 4 Stars