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TECHNOLOGY

Cabinet NG, Inc. — CNG-SAFE /CNG-Books

800-621-6501 www.cabinetng.com

May. 29, 2008

From the June/July Review of Document Management Systems

Cabinet NG has released its latest version of CNG-SAGE (6.0) this past January with major enhancements. They made a significant shift in both the user interface and the technology by moving to a .NET platform and a SQL back end. This alone will provide the capability to continue to enhance the features and functionality of the system.

Usability — 5 Stars

CNG-SAFE utilizes a cabinet-folder-document organization model. Each cabinet is set up to store a particular database of documents such as clients, vendors, employees, etc. Once you select the cabinet you wish to access, the system will provide a three dimensional display of folders. Each folder displays basic properties and provides a gateway into the individual documents and files and can be configured

with a unique set of indexing values. You can use a concept referred to as “naming templates” for indexing specific document types automatically. The system displays an Explorer type view of the document hit list and a preview of the document to the right. The user can adjust the size, location and display of

the various windows according to their individual preferences. CNG-SAFE provides a proprietary annotation tool called Imageman that enables users to create their own stamps. Searching can be performed across multiple repositories, and conditional searches can be performed, as well.

Scanning — 5 Stars

Documents can be scanned and filed using naming templates that will populate the indexing values automatically. The templates can include settings for a sensitivity level for security purposes as well as for a firm's retention policy. CNG-SAFE supports batch scanning of files in TIFF or PDF format. In TIFF format, all pages are scanned in as individual TIFF files, which significantly enhances the speed at which documents are retrieved and displayed for viewing. Barcode scanning is supported to allow documents to contain pre-printed bar codes for automatic indexing.

Integration — 4 Stars

Cabinet NG does not provide direct integration with tax and accounting software applications. However, an integration tool called Retriever is provided to create your own integrations. You can create a link to display specific types of CNG-SAFE folders and documents from within other applications. Integration with Outlook allows you to file e-mails with attachments or as separate files. A particularly nice feature is to be able to drag and drop e-mails directly into the currently active document folder. A Synchronizer module lets you create links with other applications to update your lists, i.e. clients, vendors, employees, etc.

One particularly distinct feature of the CNG-Books edition is that it can be used as a DMS for all of your QuickBooks (QB) clients. CNG generates two QB cabinets: one for vendors and one for customers. You can create a QB transaction entry from a CNG document or you can link documents to existing QB transactions. CNG-Books can be synchronized with QB to create a vendor and customer list in the cabinet, and you can preview the linked document from within the QB transaction entry screen.

Workflow Tools — 4 Stars

CNG-SAFE's workflow functionality allows you to move individual documents, folders or a group of folders. Pushing the "trace" button displays a trail of who has had the file(s.) You can route files with public or private

access. Private means no one can view the document(s) while they're in a workflow; public means you can only view them. You can use rules-based workflows that can be linear (i.e., A to B to C) or based on dynamic/conditional values, or you can simply route manually. You can attach notes to the routed documents and assign a status setting. E-mail notifications can be sent when a document is routed.

Client Portal — N/A – No Rating

There is no portal module available with the current version.

Technology — 4 Stars

CNG-SAFE uses a traditional client/server configuration model. The vendor did note that it will be offering a hosting service and will handle all of the administrative functions as part of this service.

Pricing/Overall Value — 4 Stars

The system is priced at \$995 per user for each named license, or \$1,395 for each concurrent license that can be shared by multiple users. A view-only license is \$495. A base package is available for \$2,500 that includes two named users, the server software, one year of tech support, software maintenance, and four hours of remote installation and training.

2008 Overall Rating — 4 Stars

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