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*From the June/July Review of Document Management Systems*

GoFileRoom continues to evolve in its depth and breadth of functionality based upon feedback and input from accounting and tax firms of all sizes. An interesting change in Thomson's approach to marketing GoFileRoom is to brand it for two distinct markets: GoFileRoom CS is positioned to complement the CS suite of applications for small and mid-size firms, and GoFileRoom ES (enterprise solution) is branded to meet the enterprise needs of the large firm market.

**Usability — 5 Stars**

My perennial comment about GoFileRoom's usability is how effective it is in offering an intuitive, easy-to-use interface. This remains an outstanding feature even as Thomson adds more functionality. The system uses a file cabinet and drawer configuration for organizing documents. Within each drawer, you can mix and match the configuration of metadata that is used to organize each drawer's content. The document hit list provides a right-click launch of all the actions you can take on a document including viewing, e-mailing, editing, publishing to the portal and more. Annotation is handled through Adobe Acrobat; however, GoFileRoom provides an extended set of accounting and tax tick marks in multiple colors, as well as a paperless calculator and support for dual-screen editing of PDF files. The document notes feature has been enhanced to track responses, edit previous notes, track notes by type and open notes in a separate un-docked window for enhanced viewing in multi-monitor environments.

Perhaps the most innovative enhancement to GoFileRoom is the new "QuickLaunch" feature that allows you to highlight text in other applications such as an e-mail message and have that text automatically populate a field for instant searching of documents or workflows. This opens up the potential for a lot of additional

development and integration. This feature also allows you to have multiple sessions

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Acrobat.

GoFileRoom also provides a custom set of accounting and tax tick marks for use in Acrobat.

**Integration — 5 Stars**
GoFileRoom has traditionally been positioned as a "best of breed" DMS solution for accounting, tax and financial services firms. The result of this strategy has been to provide the tools and functionality to establish integrations with various vendor applications. One of the more common integrations includes synchronizing the GoFileRoom client list with the practice management system client list. Another integration is the automatic importing of PDF copies of tax returns into GoFileRoom. Integration with electronic workpaper programs is supported, as well. The system provides direct integration with the GoSystem tax software, and integration with MS Office and Outlook provides the capability to directly store and retrieve files. E-mail attachments can be stored with the message or unbundled as separate files.

**Workflow Tools — 5 Stars**
GoFileRoom is well known for its FirmFlow module (formerly TaxFlow). This is the area I've seen the most significant enhancements in functionality over the past year. The original TaxFlow module was perceived as an effective workflow automation tool limited to tax services. By re-branding it as FirmFlow and adding more functionality, it is now a tool that can be used for all of a firm's workflows — tax, audit, consulting and practice management. FirmFlow allows you to set up an unlimited number of workflow types by defining the sequence of steps the workflow follows. Each engagement or project is assigned to a workflow, and a virtual folder is established that contains all of the related documents, files, review notes, checklists, user-defined fields and

routing assignments. The reporting capabilities have been enhanced to provide

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The most unique attribute of GoFileRoom's technology is that it is available only as a web hosted solution. This provides a real strategic benefit for firms that don't have the in-house technical expertise to configure, manage and secure an in-house SQL database solution. It also provides 100 percent remote access capability through the Internet.

**Pricing/Overall Value — 5 Stars**
GoFileRoom pricing starts at $3,950 per year for a five-user license that includes the FirmFlow workflow module and the ClientFlow portal module. GoFileRoom ES has been well established as one of the leading DMS solutions in the Top 100 firms. The new GoFileRoom CS edition brings that same functionality to small firms at a reasonable price level.

**2008 Overall Rating — 4.5 Stars**

Technology

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