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Management Systems

FileCabinet

CS completes the circle of the Thomson Reuters CS suite of tax and accounting applications. If your firm has one or more of the other CS applications deployed, then FileCabinet CS should be on your short list of potential DMS solutions, due to the integration and common user interface.

USABILITY:

The FileCabinet CS interface is designed with the client list displayed along the left side by name or client number. The main window displays a series of portlet windows including a task list, recent client/document activity, firm information, product release notices and data file locations. When you select a client, the window expands to show all of the folders, and those can be expanded to display and open the documents or native files. The main window displays notes organized in tabs by application on the top and a detailed event history in the bottom. When you select a file, it is available for immediate preview without retrieving it.

I found one of the compelling features to be the functionality for sending a document via email, which is one of the most frequently used features of any EDMS. You can choose to send the document with or without your internal annotations, convert it to PDF format, password protect the document and create a compound document, all from one simple dialogue window. The ability to pick and choose multiple files and even select specific pages from each file to create a new compound document is a feature your staff will definitely want to take advantage of. When you create a file, a banner page can be created that serves as table of contents with hyperlinks to individual documents and pages.

FILE ORGANIZATION/MANAGEMENT:

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that contains the application-specific notes, of which you have the ability to control the formatting, including color coding, to identify attributes of specific notes.

INTEGRATION:

If you have deployed other CS applications, this is where FileCabinet CS really shines. The integration with all of the other CS applications such as Practice CS, Accounting CS, UltraTax CS, Fixed Assets CS and others is embedded so that storing and retrieving files from/to FileCabinet CS is very efficient. You'll recall from the introduction to this review section (www.cpata.com/go/2410) that using the system has to be easy and intuitive for your staff or they will not fully embrace it. FileCabinet CS has this covered quite nicely.

Additional key integrations include NetClient CS, the dynamic portal tool that integrates with all of the CS applications. You can easily choose which documents you want published to the portal using drag and drop. You can populate your FileCabinet CS client list from any of the other CS applications. You can store office application files in their native format and launch them directly from FileCabinet CS.

FileCabinet CS also includes, at no additional charge, the ability to transmit scanned tax source documents from FileCabinet CS to the Thomson Reuters Data Center for OCR processing, page naming and data extraction. This data can be reviewed and seamlessly transferred to UltraTax CS for use in preparing individual tax returns.

RELATIVE VALUE:

The bottom line on FileCabinet CS is that if you are a "CS Shop" then it easily earns a five star rating across the board. The value proposition is most compelling if you use other CS applications, but it is still a robust

solution for those not using other CS products. You have the option of running

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