Thomson Reuters – FileCabinet CS

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From the Jully 2013 Review of Document Storage systems.

Best Firm Fit

FileCabinet CS from Thomson Reuters fits best within tax, accounting, and bookkeeping firms who use other components of the Thomson Reuters CS Professional Suite.

Strengths

- Tight integration with other components of the Thomson Reuters CS Professional Suite of professional accounting applications, including automatic batch publishing of data into client folders.
- Integrated automatic backup of client data for most CS Professional Suite applications (except Accounting CS and Practice CS).
- Includes check-in and check-out, which is normally a feature of a full document management system instead of a document storage system.

Potential Limitations

- There is not a Web-based version of the application, although it can be hosted by Thomson Reuters on a Citrix remote desktop platform through Virtual Office CS.
- No "recycle bin" exists in this system. Once a document is deleted (accidentally or intentionally), there is not an easy way to retrieve it.
- Integrated PDF editing requires the use of Adobe Acrobat (Standard or Pro, version 9 or higher). Other PDF editors are not supported.

Overview

FileCabinet CS is organized around the concept of a filing cabinet with a folder for each client where all related information is stored. Firms can have multiple data cabinets for storing different types of documents which are housed in separate locations.

Each cabinet contains client folders which are linked to other CS Professional Suite applications, and allow users to store either links to a client's information or the data itself within this document storage system. Templates can be used to create client data folders at the time a new client is set up, or in batch for multiple clients from within certain applications.

Users are limited to publishing data to folders for all past years, as well as one to two years in the future. Files can be dragged and dropped from Windows Explorer or Microsoft Outlook directly into a client's folder.

A PDF print driver is included with the application, as well as add-ins which provide integration with Microsoft Office applications such as Word, Excel, and Outlook. Tools also exist within the application for annotating and commenting on documents with highlighting, tick marks, notes, and multimedia clips.

A direct scanning interface which works with TWAIN and WIA compliant scanners allows users to send documents directly to FileCabinet CS when a document is scanned. Images can be sent directly to specific client folders in FileCabinet CS, and tax return source documents can be set to upload in batch to UltraTax CS Source Document Processing for automatic PDF organization, labeling, and data extraction.

The application is targeted at firms who use the Thomson Reuters CS Professional Suite of applications for small to mid-sized accounting, bookkeeping, and tax firms, and offers tight integration into many of these applications. Key CS Professional Suite applications include UltraTax CS (separately reviewed at bit.ly/utcpapa13),

NetClient CS secure client portals (review at bit.ly/fccpapa13), and Accounting CS

Summary and Pricing

FileCabinet CS licensing starts at $1,500, and pricing for an eight user firm would be approximately $2,500 for the first year and $670 for maintenance and support in subsequent years. Training, consulting, and implementation services are priced separately.

Thomson Reuters offers a number of ways to obtain FileCabinet CS, including hosting through Virtual Office CS, a "pay as you go" arrangement similar to leasing or renting software through their SaaS offering, or a traditional up-front purchase. The publisher offers some discounts off of the full suggested retail through application bundles and volume licensing.

2013 Ratings:

Core Product Functions/Features: 4.75 Stars
Integration/Data Export/Import: 4.5 Stars
Advanced Functionality: 4.5 Stars

2013 Overall Rating: 4.5 Stars

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