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**Brian Tankersley** • Aug. 08, 2014

## Overview

GoFileRoom is a web-based document management system designed to be used primarily from within the Internet Explorer web browser. The software has traditional features like version control, check-in and check-out, and supports bar-code scanning to help streamline document organization. Workflow and document routing are available using the integrated FirmFlow workflow engine, and documents can be routed to clients using the ClientFlow feature within the optional NetClient CS portals.

Although GoFileRoom was designed for use with GoSystem Tax RS, Thomson Reuters has built out interfaces which connect GoFileRoom to many of its CS Professional Suite applications. There are also new integrations to other applications, including SurePrep SP Binder, SurePrep 1040 Scan, and Practice CS practice management software. The software is hosted by Thomson Reuters at secure data centers in the continental US.

The application has add-ins for Microsoft Office apps, including Word, Excel, and Outlook, which allow files to be retrieved and stored directly from within Office applications. TaxTools for GoFileRoom is an Adobe Acrobat add-in which allows users to edit PDF documents stored in GoFileRoom, enhances support for multiple

monitors, and provides users with a calculator. The major limitation of the add-ins

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GoFileRoom performs batch-based optical character recognition on all of the data uploaded, so users can perform word searches on the contents of stored information.

GoFileRoom also allows users to install a control panel application which allows users to set up shortcuts which simplify the process of indexing and uploading documents into the application. Files can be dragged onto these shortcuts, which associates preselected metadata with each file, and simplifies the process of importing existing files into the application.

The application's security model allows permissions to be granted at the user, drawer, group, client, and file levels. This flexibility allows organizations to maintain granular control by individual user over some documents, while allowing blanket access to other groups of documents by drawer or staff groups.

### **Best Firm Fit**

- Firms who use other Thomson Reuters products, including GoSystem Tax RS, Practice CS, and AdvanceFlow. GoFileRoom can also be used very effectively with the Thomson Reuters CS Professional suite.

### **Strengths**

- Flexible cloud-based document management system with optional workflow and enterprise IT integrations.
- Add-ins for Microsoft Office (Word, Excel, and Outlook) make it possible to save documents from within these applications, although Office 2013 was still not supported as of this writing (early July 2014)
- Simple graphical user interface and file cabinet organization for file drawers is easy for most users to understand

- Flexible index fields make it easy to customize each file drawer to meet the

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as much as a year.

- GoFileRoom is relatively unstructured, so firms adopting this product will need a plan to design and implement the index fields, workflows, and user training needed for successful adoption

## Summary and Pricing

GoFileRoom is a monthly subscription based on for the number of users, and starts at \$4,205 per year. Implementation and training are a critical part of the adoption of this flexible application, and are priced separately.

## 2014 Overall Rating: 4.75 Stars

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