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CS.ThomsonReuters.com

GoFileRoom was the pioneer application for a completely web-hosted, browser-based DMS solution. The product was acquired by Thomson Reuters about five years ago from Immediatech. GoFileRoom originally focused on the large firm market but has steadily expanded into the small and mid-size firm space with an attractive, all-inclusive pricing model. GoFileRoom is a scalable solution that can meet the needs of any size firm, from a small practitioner to a big four firm.

Core Product Features & Functions

GoFileRoom's signature feature has always been its virtual file cabinet display with interactive drawers that provides a very intuitive interface. Each drawer is organized according to the type of documents you intend to store in it, such as tax documents, write-up, HR, etc. Each drawer has its own uniquely configured metadata structure to organize documents in a manner consistent with the nature of their content. GoFileRoom now provides user preferencing to streamline the interface so each user can automatically navigate to a preconfigured point for improved efficiency.

The GoFileRoom print driver allows you to publish output from any Windows application to the appropriate file cabinet drawer. All scanned documents are processed through an OCR engine on the back end at the data center. This eliminates any direct bottlenecks in your scanning operation resulting from a slow OCR process.

5

Integration

Integration with most of the major tax and practice management systems is available to publish tax returns directly to the DMS. The Office integration is managed through

a GoFileRoom toolbar for storing and retrieving Office files directly to/from the

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provides a complete solution for establishing a workflow and setting up an engagement to be routed to a pre-defined set of individuals or groups. All of the information necessary to manage a typical engagement along the way is accommodated, including review notes, deliverable due date tracking, checklists, custom information and more. 5

Remote Capabilities

Since GoFileRoom is a completely browser-based solution that is only available in a hosted model, it is a truly anytime, anywhere solution out of the box. The client portal solution has been recently transitioned into the NetClient CS portal (see the review of FileCabinet CS on page ?? of this issue). This provides a robust two-way portal solution for securely publishing and uploading client files while combining the array of business transaction functionality that comes with NetClient CS. 5

System Management

Document security can be established globally at the database, drawer, folder, document type, client or user level. Document version control is available as an option to track multiple file revisions. The check-out/check-in feature allows the file to be edited by one user, while the others are limited to view-only access. Documents can also be checked out for off-line editing then uploaded back to GoFileRoom when the user re-establishes Internet connectivity. The system clearly displays who file is checked out to. A document retention module called RecordsFlow allows users to configure retention rules to delete or archive documents that conform to firm document retention policies. 4.75

Summary & Pricing

GoFileRoom has earned a solid reputation in the marketplace as an intuitive solution that requires minimal technology issues to deal with as a hosted solution. With the

integrated FirmFlow workflow module and the NetClient CS portal solution, you

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