www.cabinetng.com

This is an example of a DMS solution that is designed horizontally for deployment in a variety of industry types, but the vendor focuses on the accounting firm market as a key niche. This review is on CNG-SAFE, the vendor's enterprise DMS solution. They also offer CNG-Books, which is designed specifically to integrate with QuickBooks. Cabinet NG continues to expand the product's feature set, while also holding the pricing level steady for the past five years.

Core Product Features & Functions

The file storage hierarchy is designed so that you can organize files logically according to your firm's service offerings. It starts at the "repository level," which can be used to create separate document databases for separate entities. From there, the program utilizes a cabinet|folder|document model for organizing files. This is the basis for the navigation panel along the left side of the screen. As you navigate into a document, a preview window displays the document without launching the application.

The CNG print driver opens up the CNG-filer dialogue window, where you can use naming templates to streamline the metadata tagging of the printed files. Options for storing files in TIFF or PDF format are available.

A report generator tool lets you build a query based on specified filters. Generated reports can be printed, saved or exported to PDF, HTML, Excel and other formats. Report settings can be saved for future use to facilitate customizing your firm's standard reporting requirements.

OCR conversion is done at the time of scanning using CNG's optional OCR conversion tool to create searchable PDF documents. TIFF files can be converted to

searchable PDFs, as well. 4.75

Workflow functionality is an area that CNG focused on this past year, and it is built-in at no additional cost. You can right-click a document to route it and then pick where you want to send it, using either a rules engine or routing it manually. A trace feature shows the trail through which the document moved. Users can change the status of the document, including putting it on hold.

Perhaps the most powerful integration feature is the CNG Retriever utility that lets you map direct integrations between most Windows and/or web-based applications and CNG-SAFE. 4.5

Remote Capabilities

CNG offers a client and web browser interface. The portal solution is facilitated by extending a user login to your client that is limited to accessing only the designated documents. 4.75

System Management

Document security is managed through the use of "sensitivity" settings. These settings designate what level of rights a user has, i.e., view only, edit, etc. This setting can be applied at the cabinet, folder or document level. Version control is included and can be set on or off at the cabinet, folder or document level. The document retention features lets you establish an unlimited number of retention policies. Three levels of check-in/check-out control are available — lock the file so nobody can access or view it, suspend the file for a legal hold if a subpoena is issued, and a view-only option. 4.5

Summary & Pricing

CNG-SAFE offers a comprehensive solution that can be deployed across all functions

Pricing for CNG-SAFE is $1,395 for a shared concurrent license, $995 for a dedicated named license, $495 for a view-only license and $150 for portal access users. These prices are discounted once you exceed 10 users. The hosting option is priced at $75 per user, per month, plus $5 per GB of storage in excess of 5GB. The CNG Retriever module is a $500 add-on, but it's well worth the price.

2010 Overall Rating 4.75

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