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FIRM MANAGEMENT

2020 Review of PSIsafe from PSIGEN

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PSIsafe

PSIGEN

www.psigen.com

From the 2020 reviews of Document Storage and Document Management systems.

After its purchase of both Cabinet SAFE and Cabinet SAFE Cloud in 2017, PSIGEN introduced a new product: PSIsafe. Well-suited for mid-sized and larger companies, PSIsafe offers excellent document management solutions for a variety of business types, including financial services companies, healthcare, and human resources. PSIsafe offers both on-premise and cloud deployment options with a mobile app available for both iOS and Android devices.

PSIsafe offers an updated user interface that is designed to mirror a traditional file cabinet, making it easier to locate a stored document. The application supports multiple file formats with all documents stored in their original format and an option to convert any file to PDF if desired.

PSIsafe uses both repositories and cabinets to store documents, with repositories categorized by group. Each repository in PSIsafe can be customized by users as desired. Once a repository has been created, users can then create individual cabinets for each repository, with the option to create an unlimited number of cabinets for each repository. Cabinets, like repositories, are completely customizable; users are able to choose from a variety of structures when setting up each cabinet. Once cabinets are set up, users can begin adding documents to the appropriate cabinet.

Users can easily preview any document for accuracy, edit the document, and even lock a document to prevent unauthorized access. Documents can also be temporarily suspended if necessary. PSIsafe includes document versioning, and the included audit function allows managers to view all activity that takes place around any document, including a complete list of edits made to any document. Users can import documents directly into PSIsafe, or drag and drop documents from the desktop directly into the application. Users also have the option to compare documents side-by-side to review the accuracy of any document changes.

PSIcapture (an add-on) is required if firms wish to scan documents into PSIsafe. When adding multiple documents, users can opt to use the batch utility feature that easily processes multiple documents in a variety of formats. PSIsafe also includes a default template that needs to be used when adding a new document into a cabinet, with users able to create a custom template or edit an existing template to better suit their needs.

PSIsafe contains a powerful search engine that allows users to search and locate documents in a variety of ways, with three main search types available: Documents, Full Text, and Folder. Users can do a quick document search or an advanced search using a variety of criteria including keyword, document creator, creation date, modification date, or document title. The application also includes good workflow capability, with users able to route any document to a colleague when needed. Recipients can choose to accept or reject any document forwarded to them, returning the document to the sender.

For firms that wish to share documents with colleagues and clients, PSIsafe Share (included with the program) is available. The Share module allows users to specify

with which clients they want to share documents, and users can drag and drop documents from their computer directly into Share.

PSIsafe offers excellent security options, with managers able to set multiple access levels for both documents and folders. In addition, the cloud version of PSIsafe offers 128-bit encrypted file transfer, 256-bit encrypted data storage, as well as the ability to set automatic document expiration dates.

PSIsafe is designed to integrate with other PSIGEN applications including PSICapture, which offers advanced document capturing capability that can be used with more than 60 Enterprise Content Management (ECM) systems. PSIGEN also includes an open API, which provides easy integration with third-party applications including Salesforce, Redtail, and Sharepoint. In addition, the application can be synchronized with QuickBooks applications. Other add-on options include PSIsafe Share (included with the program), PSICapture, PSIsafe eSIGN, and PSIsafe Retriever.

All PSIsafe users have access to a variety of help and support options including a variety of quick start guides and installation assistance, as well as access to the searchable knowledge base. In addition, users can access the How-To and troubleshooting feature, which also includes a variety of FAQs. Product resellers are primarily responsible for first-tier support, though users also have the option to contact PSIGEN directly during regular business hours. Users can also request support directly using the reseller support portal. PSIGEN also offers training options including online training as well as installation and configuration support.

PSIsafe is a powerful document management solution that is best suited for mid-sized to larger businesses including accounting firms that have more complex document management needs. PSIsafe currently offers three plans: Business Essentials, which is only cloud-based, and Professional and Corporate, with both versions available as either an on-premise solution or on the cloud. If interested in PSIsafe, visit the PSIGEN website to request a demo or obtain custom pricing.

2020 Rating – 4.75 Stars

Strengths:

- Integrates with QuickBooks
- Contains an open API
- Suitable for a variety of business types

Potential Limitations:

- Better fit for larger, not smaller, firms

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