used by accounting professionals and others who need a flexible system for indexing and retrieving documents.

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# Overview

and other financial services companies in 2013 and 2014.

The resulting application is powerful enough to meet the needs of advanced users, with features like configurable workflow, full text OCR, check-in/check-out, version control, and customizable index fields, while keeping things simple enough that many new users do not require training to work effectively. The product can be used as a simple DMS for new users, and when they are ready, the more advanced features can be configured and implemented.

The application does not have direct integration with any tax & audit software applications, but it offers a number of simple workarounds, including a dedicated Windows printer driver for capturing printing directly from application, a "hot folder" application which automatically uploads any files placed in the designated folder into the DMS, and the mobile apps, which permit users to take pictures of documents which are presented as PDF files.

There are also add-ins for QuickBooks (on-premises) and Microsoft Office 2007/2010 (but not Office 2013). Document routing and workflow capabilities are included in the application, but will require some training and consulting to get them ready for production by most users.

The product has a suite of tools for managing documents, including check-in, check-out, version control, and good tools for uploading new document versions to the server. Documents can be indexed with different user created document metadata templates, and can also have class lives or retention periods assigned to them from within the application. A through audit trail is embedded in the application, which runs on Microsoft's SQL Server database platform.

An optional portal service is available (Secure Drawer) which is tightly integrated into the user interface. Supported scanners include most TWAIN compliant

scanners, and we were pleased to see that the Company sells a number of good

the flexibility of eFileCabinet's cloud offering, which is accessible on Windows, Android, iOS, or in a web browser.

### Strengths

- The application can be delivered in a number of ways, including on-premises installation, via mobile apps, using a web browser, or using a client application which connects to a remote server.
- eFileCabinet integrates tightly with QuickBooks, has a tightly integrated portal solution (Secure Drawer) and has been deployed as a production document management system inside CPA firms for over 10 years.
- Easy to use ribbon interface and logical menu options allow users to be productive with minimal training.
- Mobile apps for both Android and iOS allow access to documents from anywhere you and your tablet go.
- Integration with optional SecureDrawer portals is seamless and makes sending documents to clients easier.

### Potential Limitations

- Users with slow internet connections will want to avoid the cloud offering, which stores all files in eFileCabinet's secure hosting facility.
- Firms who are implementing their first document management system should thoughtfully consider the index fields for their documents, as making index field changes and repopulating the existing records is time consuming and tedious.

### Summary and Pricing

eFileCabinet is a well-established document management system which can be configured for use in a wide range of industries. Although the company's historical

strength is in deploying their product in accounting firms, the product is available in

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