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Mary Girsch-Bock • Dec. 18, 2017

eFileCabinet Document Management

www.efilecabinet.com

From the Dec. 2017 Review of Document Management & Storage Systems.

eFileCabinet is a solid document management solution for firms of all sizes. The addition of the Express edition of eFileCabinet now makes it suitable for even the

smallest firms.

integration with OneDrive and GoogleDocs.

eFileCabinet's Workflow Management System (WMS) includes rule-based actions for automatically creating entire folder structures, auto-naming files, setting document permissions, automatic email notifications and e-signature. Workflows can be created in minutes using a drag and drop workflow designer. Status of each workflow can be easily monitored in the workflow dashboard. Tasks are routed appropriately through the organization with custom messages attached containing instructions or request specifics. Documents for approval can be viewed and either marked accepted or rejected right from the workflow dialogue window. Alternate approvals can be assigned to more than one person in the case that the primary approver is not available to keep the process moving. Finally, workflows can be triggered using conditions such as when a new file is added or new structure is created.

Originally designed for accounting firms, eFileCabinet is now used by a variety of business types including health care, law firms and property management companies. eFileCabinet can be deployed as an on-premise product or as an online solution. The product is scalable, with four versions available ranging from an Express edition for very small businesses, to an Enterprise level application that offers an SQL version (on-premise only) for very large businesses. There is also a mobile app available that works with both iOS and Android smartphones and tablets.

eFileCabinet supports multiple file formats for content types such as documents, invoices, checks, loan applications, CAD drawings, photos, audio and video, or users have the option to convert files to a PDF if desired. The product uses a file cabinet structure, with all files stored in Cabinets, with each cabinet containing drawers. The drawers, like a regular file cabinet, contain both folders and subfolders.

Cabinets can be created for a variety of categories by simply clicking the Add Cabinet

eFileCabinet allows users to check documents in and out, and a version control function helps to ensure that the correct file is accessed at all times. Both the Professional and Enterprise versions of eFileCabinet offer workflow capability, audit trail functionality, and enhanced security options. Document routing capability is also available in the application.

SideKick, eFileCabinet's tool for accessing content quickly has been enhanced in 2017, so users can now preview documents immediately without having to open or download the file. The drag and drop capability has also been enhanced in SideKick, with users able to upload multiple files, eliminating the need to toggle back and forth between applications.

eFileCabinet has a list of recommended scanners that integrate directly with the application, with some scanners able to upload as many as 80 documents at once; perfect for those looking to move a high number of filed documents into electronic storage. The product employs SSL/TLS encryption on all transmitted data, and a mass backup is performed nightly on all files stored on eFileCabinet servers. In addition, user permissions can be assigned to eliminate unauthorized document access.

SecureDrawer is a free add-on option that can be utilized with both the online and the on-premise version of eFileCabinet. Described as an online sharing service portal, SecureDrawer allows users to share files with colleagues, business associates and clients alike. Recipients do not need an account with SecureDrawer to access the files.

eFileCabinet offers good help and support options online, with FAQ's, setup and installation help, as well as user and training manuals available for all editions of the application. A user forum is available, and users can access support via chat or email.

Toll-free telephone support is also available for all editions of eFileCabinet except for

Storage are also available at an additional cost.

2017 Rating 5 Stars

Firm Management • Technology