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Psigen

www.psigen.com

From the **2018 reviews of Document Management and Documents Storage Systems** for accounting firms.

After acquiring both Cabinet SAFE and Cabinet SAFE Cloud in early 2017, Psigen totally rebranded the products, introducing PSIsafe in early 2017. PSIsafe offers excellent document management capability and is best suited for mid-sized to large accounting firms, as well as other industries including Legal, HR, and Manufacturing. PSIsafe offers users a variety of deployment methods including both on-premise and cloud-based, with a mobile app available as well.

It is suggested that those new to PSIsafe utilize the services of Psigen engineers to ensure that initial system configuration and file structure is set up properly. The product easily handles multiple file formats, with all documents stored in PSIsafe in their native format, with easy conversion to PDF available as well.

PSIsafe uses repositories, cabinets, and files to store documents. Repositories are categorized by department or by group and are user-definable. Once repositories are defined, users can create cabinets, which are built into the repository. There is no limit to the number of cabinets that can be added to a single repository. The structure of the cabinet is fully customizable as well, with users able to choose from a variety of structure options when creating a cabinet. Folders are then placed in the appropriate cabinet, with users able to use tabs to group documents in a single folder.

Users can preview documents, view stored documents, lock and unlock files, and edit documents directly from the repository. When adding documents, users can add files individually or use the included batch utility that can process multiple documents in Tiff, PDF, JPG, and PNG formats. New and Scan options are available when adding a

new document. For each document that is created, users must use a template, which

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route documents to the correct recipient, with recipients able to approve or reject the document, edit the document, return it to the sender, email the document, or even print it if necessary.

Firm administrators can easily assign access rights to employees, creating user groups with specific rights to a repository, cabinet, folder, or document. Document and folder access rights are controlled using Sensitivity Classes, which define security settings, with numerous access levels available including None, Preview, View, Edit, Create, Delete, and Lock.

Document sharing is available through the optional PSIsafe Share module, enabling users to share documents with specified clients. Documents can be easily dragged and dropped to the Share Window, and users can enter a single client or multiple clients that they wish to share documents with.

PSIsafe offers excellent integration with other PSIGEN products which include PSICapture, designed for advanced document capturing ability and PSIfusion, which offers advanced indexing and validating of documents by select personnel. Also offered is PSIsafe Share, PSIsafe Retriever, and PSIsafe e-Sign. Open API allows PSIsafe to integrate with a wide variety of third-party applications including Salesforce and Redtail.

PSIsafe's Help and Support page offers access to an online knowledgebase, product documentation, access to the support website, and access to the partner portal. Clicking on a product will display a Management Guide, End User Guide, and Web Guide, with guides for add-on applications available as well. The guides offer everything from key product concepts, workflow and tracking, search capability, and a troubleshooting option. First line product support for PSIsafe is typically handled by PSIsafe resellers. Second level support is handled by PSIsafe personnel, with users able to request support during business hours or through the support portal.

PSIsafe is a complex document management application that is best suited for mid-

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