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Management Systems

Doc.It

takes a very deliberate approach to its design strategy. This is particularly evident in the development of its two core modules. One is the WIP binder for document management of dynamic files that are actively in use for a particular engagement. Think of the WIP binder as the “current file folder” that you are accustomed to in a paper-based workpaper world. The other application is the Archiver, which is the repository for managing files that are essentially “closed file” documents. Everything goes into the archive module as a static PDF file.

USABILITY:

The primary interface embodies the two-part design strategy outlined above by displaying a window of recent document binders with which you have worked to facilitate quick access to your current engagement files. A second window displays a list of current archived files with which you have worked. Think of the two working together the way you would use the current and prior year files in a traditional workpaper flow.

The left side of the screen provides your control center to launch all of the Doc.It applications and to access the workflow functionality and features to personalize your Doc.It interface.

FILE ORGANIZATION/MANAGEMENT:

The files in the document archive repository are organized in a traditional folder model divided into two primary categories: clients and operations. From here, you can customize your sub-folder design as desired. Search tools allow users to find information independent of the folder structure. One of the particularly unique file organization features is the ability to create “compound documents.”

These are collections of individual files that you choose to consolidate into

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PDF format and transferred over to the archive repository.

INTEGRATION:

Doc.It offers a comprehensive suite of integrated applications. The scanning and forms recognition module provides document “cleanup” functionality and will recognize certain forms that are in the Doc.It database, as well as forms that you choose to add to the database, to force the document title and folder location. These tools help to streamline the scanning and document organization process.

The workflow module has an extended feature set that includes a unique integrated staff scheduling tool. The scheduler allows you to establish a set of parameters to define what type of staff resource will qualify including skill set, cost, client experience and client preference. It is not a simple tool, but if you make a concentrated effort to deploy it properly, you can reap significant rewards in terms of more effective staff utilization.

The two-way portal module stores published files separately from the master archive repository. Clients can receive email notifications when files are posted to the portal. Likewise, the firm will receive notifications when the client uploads files. The portal files are organized into public and private folders that let you separate files that are to be shared by all authorized client personnel from those that are available only to specific individuals.

The e-mail convertor module streamlines the process of moving email messages and attached files in their native format or as PDF files into Doc.It.

RELATIVE VALUE:

Pricing is based on a unique model that Doc.It refers to as a membership. The

licensing fees include an initial \$150 one-time fee per user and a \$35 per month,

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