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DOCUMENT MANAGEMENT

2013 Review of Doc.It Suite

Apr. 29, 2013

Doc.It Suite

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From the **May 2013 review** of Document Management systems.

Best Firm Fit

- Public accounting and bookkeeping firms who want a single, best-in-breed solution to gather, process, store, and deliver documents.
- Although the product is used in some firms with over 100 users as well as solo practitioners, the product's features are designed for firms with between five and 75 users.

Strengths

- Designed by public accountants for public accounting practices, and the Company has a proven methodology for implementing its solution in accounting and bookkeeping firms.
- Includes a fully functional tool for viewing, editing, and marking up PDF documents and a server app for hosting integrated client portals at no additional charge.

- Archived files are converted to indexed PDF files, and have retention periods assigned to them which are linked to the types of document.
- Good integration with popular engagement management software like CaseWare Working Papers and CCH ProSystem *fx* Engagement, as well as Microsoft Outlook, Word and Excel.

Potential Limitations

- The Doc.It Archive currently only allows PDF files to be placed in the archive, however Doc.It Work Binders do not have this restriction.
- Although the software can be implemented on a module-by-module basis, the software is only sold as a bundled solution.

Overview

The Doc.It Suite is a comprehensive document management solution for small to mid-sized firms. This solution is based on the concept of “binders”, which are reminiscent of the notebooks used to store paper working papers. The Company’s software is designed to manage data associated with pending and active projects in the native file format (e.g. Word, Excel, QuickBooks, etc.) for editing, with features like version tracking and check-in/check-out of documents.

Once a file is totally complete and ready for long-term storage, the data is converted to a bookmarked PDF file and moved to the Doc.It Archive for long-term storage and disposal after the file’s retention period (from one year to forever).

Key components of the solution include:

- **Doc.It Work Binder**, a tool for managing in-process engagements and the related groups of files stored in the native format
- **Doc.It Archive**, an archiving application which creates PDF version of finalized documents (tax returns, financial statements, completed working paper files) for legal and regulatory compliance purposes
- **Doc.It PDF Editor**, a full featured PDF editing tool which allows users to organize, annotate, and redact information in documents. This tool replaces Adobe Acrobat Pro or Standard for most users

- **Doc.It Binder Explorer**, a product designed to search, filter, and select data stored in the software
- **Doc.It Web Portal**, a product designed to allow a firm's clients to access and upload documents via a web browser

The Doc.It Suite also includes an OCR application called Doc.It Advanced Forms Recognition, which allows groups of files to be classified with text-encoded cover pages, and can be used to split a tax return into its component forms and schedules in a predefined folder structure. The forms recognition library is a series of rules which will identify, route, and classify most tax forms into an organized group of separate working paper files stored in a work binder.

Summary & Pricing

All-inclusive pricing for the Doc.It Suite starts at \$35 per month, per user, plus a one-time \$150 per user license fee. Required fees for the initial implementation and training vary depending on the size of the firm and are available upon request.

2013 Ratings:

Doc.It Suite	
Core Product Functions/Features	4.5
Document Workflow	5.0
Document Control	5.0
Special Features	4.25
Overall Rating	4.75

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