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Brian Tankersley • Aug. 08, 2014

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 paper notebooks used to file engagement documentation. The Company's software is designed to manage data associated with pending and active projects using the Work Binder module.

Work Binder stores data 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 reviewed, totally complete and ready for long-term storage, the data is converted to a bookmarked PDF file and moved to the Doc.It Archive Binder for long-term storage.

The process of converting the engagement from native format to PDF makes it more tamper resistant, and simplifies the process of compliance with the audit lockdown rules. Documents and engagements are assigned a class life retention period, and can

be disposed in batch by an administrator with a utility after the expiration of the

and creating a summary of audit differences.

- **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 help users search, access, and review documents stored in the software.
- **Doc.It Web Portal,** a product designed to allow firms and clients to exchange large documents securely for short term and long term storage purposes. Retention management is applied to all files.
- **Doc.It Workflow,** a fully integrated workflow solution for documents managed via Work Binders or other binder software solutions. Easy assigning, routing and monitoring of all projects from the Binder Explorer screen.

The Doc.It Suite also includes an application called Doc.It Advanced Forms Recognition. The forms recognition manager is a series of rules which will identify, route, and classify most tax forms into an organized group of separate working paper files. They are placed into the folders of a Work Binder. The system will use scan separators to identify documents difficult to recognize like hand written notes, charitable donation and medical receipts. The solution also has tools for managing assigned tasks and workflow throughout the firm.

Best Firm Fit

- Public accounting and bookkeeping firms who want a single, best-in-breed solution to gather, process, store, and deliver documents.
- The product's features are designed for firms with between three and 300 users, although its core market has historically been smaller firms with between five and

100 users, with some firms with considerably more.

- 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.
- Doc.It is one of the only products in this review which allows firms to host portals on an internally hosted server, although managed hosting is available for a separate charge.

Potential Limitations

- Doc-It does not currently offer a mobile application or "browser-based" access to documents, in the DMS, although the solution can be accessed over a remote desktop connection on some mobile devices. Access to the Web Portal is available on mobile devices. .
- Although the software can be implemented on a module-by-module basis, the software is only sold as a bundled solution.

Summary and 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.

2014 Overall Rating: 4.75 Stars

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