
Doc.It addressed our biggest concerns: Archive storage & secure file transfer

REAL PEOPLE. REAL RESULTS.

ONTARIO – For Dan Waterston, partner at Weiler & Company, the decision to work with Doc.It was due to Howard Brown's vision, personality, and Doc.It's pricing. Weiler & Company has had Doc.It in the firm since April 2003.

Decision-making factors when considering paperless DM Software

In 2003, we were searching for a tool to better manage our archive. We met Howard Brown, Doc.It's CTO, who came to our office. Howard promised a suite of products, which is exactly what Doc.It is delivering today. Additional factors contributing to our decision include the following:

- We believed Doc.It technology would take our firm to where we wanted to go.
- Doc.It does not require a long-term agreement. Their billing meant we could remain flexible into the future by not being forced into a long-term contract.
- Doc.It bills on a price-per-user basis, which is appreciated.
- Doc.It has a low entry cost and provides us with a usable archive that stores non-proprietary PDF files.
- Integration is important, and Doc.It integrates with Caseware, which is another critical tool in our firm.

How we use Doc.It

- We use the Doc.It Portal for secure client communication and file exchange.
- We use the Doc.It Agent for PDF file time sheet review for staff.
- We use the the Doc.It Suite with its Archive for our searchable, secure long-term data retention.
- Doc.It archives files in a PDF format. This means we never lose access to any of our documents and files, and we are guaranteed access anytime in the future, regardless of the software we are using.

Doc.It addressed our firm's biggest concerns

Archive Storage. One of our biggest concerns prior to adopting Doc.It was that the archive store data in a format that would allow for long-term future access. This concern is not a factor with Doc.It because it uses PDF files for the purpose of retaining data in the Doc.It Archive.

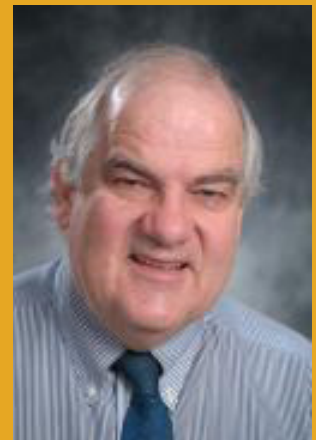
Secure File Transfer. The Doc.It Portal provides for secure client file data transmission in and out of the firm. We use the portal for large QuickBooks files and documents that should not be sent through email, which eases one's concerns about the security of email for the purpose of exchanging files like these.

Our recommendations

Doc.It as a paperless DM technology should be accessible and used by everyone in the firm on a regular basis. With any software, one must use it frequently to get familiar with its nature. We designed the implementation so that everyone in the firm uses Doc.It every week.

I caution firms to not stop with 2 or 3 licenses, rather, get licenses for everyone and require everyone in the firm to use the Doc.It technology.

Weiler & Company

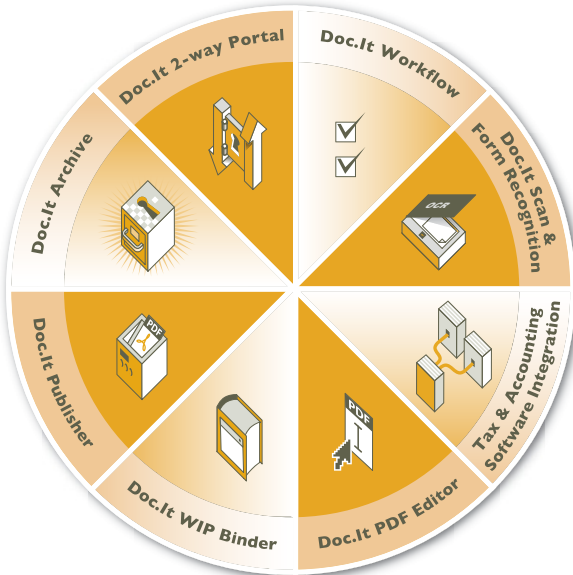


Dan Waterston, CA CA-IT CA-CISA, Partner

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FIVE-STAR FOR THE RIGHT REASONS:

USABILITY:

How easy the system is to interact with.

FILE MANAGEMENT & ORGANIZATION:

The methodology the system utilizes for organizing the electronic documents.

INTEGRATION:

MS Office, accounting and tax applications, and extended applications such as intelligent scanning, workflow, and portal modules.

RELATIVE VALUE:

The breadth and depth of functionality relative to the cost of the system.

Integration is a critical aspect of document management technology. Doc.It® Suite integrates with Microsoft Office and time & billing software to synchronize client information. Doc.It® Suite also includes a full set of PDF tools including our own Doc.It® PDF Editor and Composer with full annotation capability. These document assembly tools can merge, split, append, or remove pages from PDF documents. Expensive Adobe Acrobat licenses are not required because the Doc.It® Suite handles these tasks with ease.

Doc.It Suite, which uses the universally-accepted PDF technology, requires no third-party licenses (such as SQL), and has the ability to capture, convert, and archive any paper, fax or electronic document into PDF format. You can also add diarized notes, mark up individual pages and electronically sign documents. The system also manages your e-mail through direct integration with Outlook. The Suite has powerful search engine, uses a familiar folder format, and also supports multiple office locations and remote access with full support for Terminal Services and Citrix.



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