

Doc.It Suite®

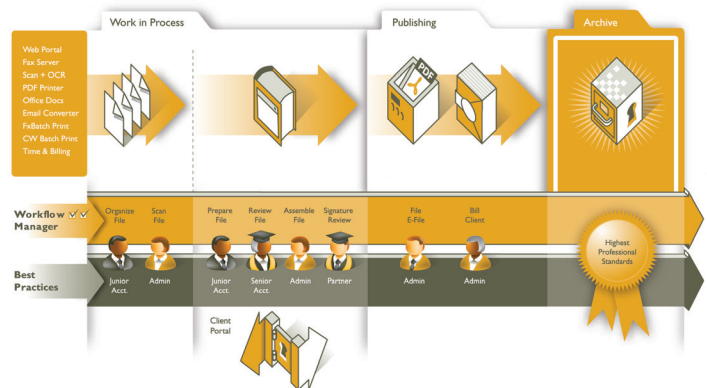
WORKFLOW



Why Doc.It WorkFlow? A well-designed workflow system is the next logical step in improving efficiency and staff utilization within an accounting firm. Doc.It Suite® includes the industry's most powerful workflow management system. Most workflow systems provide effective tracking of project tasks, but only Doc.It WorkFlow with Smart Scheduler can “intelligently” assign tasks to the most appropriate staff person.

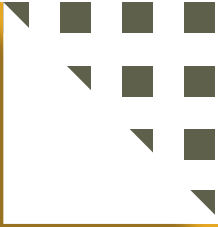
DOC.IT SMART SCHEDULER uses a rules-based system to make relevant scheduling decisions. This technology employs the same criteria that a management person would use in selecting staff, including:

- assignment of tasks based on the required skill;
- internal billing rate of candidates;
- staff availability;
- staff history with this client; and
- load-balancing to insure that staff are evenly utilized.



THE CHALLENGES THAT DOC.IT WORKFLOW SOLVES

- **Maintaining order during tax season:** If a mid-size firm processes 1500 tax returns during tax season, it may translate to 15,000 steps or tasks. That is a huge volume of work to manage manually or with an Excel spreadsheet which many firms are still using today. It is inevitable that tasks will be missed or late, causing client dissatisfaction. Doc.It WorkFlow will avoid these issues through the seamless tracking of every one of those tasks.
- **Enhancing the Paperless Process:** Doc.It WorkFlow links directly to Doc.It Binders which contain all of the documents for each engagement. When a staff member selects a WorkFlow task to be processed, the associated Doc.It Binder can be opened in a single click providing the staff member with immediate and controlled access to the documents that they require. The result is an unprecedented improvement in efficiency and security.
- **A single point of management:** The Doc.It WorkFlow Manager program provides a single point of management for every WorkFlow and its tasks within the firm. Managers can view the information from different perspectives through powerful sorting and filtering of the data with a few key strokes. The result is much faster response to possible problems by quickly assessing the status of a workflow with the ability to easily re-assign the work.



THE BENEFITS OF DOC.IT WORKFLOW

SCHEDULING - Automated and intelligent scheduling of work insures that job tasks are assigned to staff in accordance with appropriate skill sets and availability, while greatly reducing the time and effort spent in the assignment of work.

ELECTRONIC ROUTING AND TRACKING OF TASKS - Firm efficiency increases through electronic routing, causing completed task assignments to move from one person to the next. Doc.It WorkFlow users will see outstanding tasks automatically appear in their Doc.It Task List as they are assigned, serving as a reminder for deadlines and enabling the seamless flow of work throughout the firm.

BALANCING OF WORKLOAD - WorkFlow is a dynamic process. Client priorities change, staff call in sick and some tasks run late. With Doc.It WorkFlow, a minor change like moving a task from one staff member to another can occur with a few mouse clicks while more complex re-alignment of workflows can be handled automatically with the Doc.It Smart Scheduler, saving many hours of management time.

MANAGEMENT AND CONTROL OF ALL ENGAGEMENTS - From cradle-to-grave, Doc.It WorkFlow allows immediate access to file and project information. Within Doc.It WorkFlow, managers can instantly locate who is working on a file and project. This benefit is exceedingly important during year-end or busy season, where the volume of work can be very difficult to manage with manual processes and due dates can be missed.

WORKFLOW FAQs

WHAT IS WORKFLOW? Doc.It WorkFlow is a management tool that facilitates scheduling, control, and management of engagements from start to completion.

CAN ENGAGEMENTS BECOME STALLED OR MISSED?

No. Every task of every engagement is managed. A new task cannot be started until the previous one is completed. Late tasks are flagged and due dates are tracked. If a staff member is off sick, their tasks can be automatically re-assigned. Daily reports can be run to review task due dates, overdue tasks, and more.

CAN WORKFLOW BE USED FOR ALL TYPES OF

ENGAGEMENT? Yes. Doc.It WorkFlow can be used for managing the flow of all processes that occur within an organization.

WILL WORKFLOW INCREASE FIRM PRODUCTIVITY? Yes.

Doc.It WorkFlow streamlines the movement of tasks and documents through the office. Managers and partners will know what the status is of every engagement. Delays in locating files will be eliminated. And, your most valuable and expensive resource, your staff, will be optimally utilized through automated load-balancing.