

Document Archive

Integrated, Secure, Folder-based Storage

Doc.It® Suite's fully-integrated, secure, folder-based document Archive stores application-independent fully-searchable, bookmarked PDFs that are placed in the Doc.It Archive when the client engagement is complete. Quickly locate, view, or deliver any document stored in the Doc.It Archive without reliance on the software application used to create it. Doc.It Suite's functional security allows one to specify access and modification rights to ensure files are not changed, moved or deleted once filed in the Doc.It Archive. Partners prefer the Doc.It Archive over "dynamic" data files during client meetings as the PDFs are quicker to reference, cleaner to present, and easier to forward.

Application-Independent Storage = Freedom

The Doc.It Archive stores documents as published PDF files independent of the original software applications. Firms retain control of their documents and can get the data out at any time for any reason. Open and read or share files anytime in the future without being forced to keep outdated or discontinued versions of software years into the future. The client's Doc.It Work Binder with the original dynamic documents can be launched with one click from the Doc.It Archive.

Documents are Organized, Named and Filed

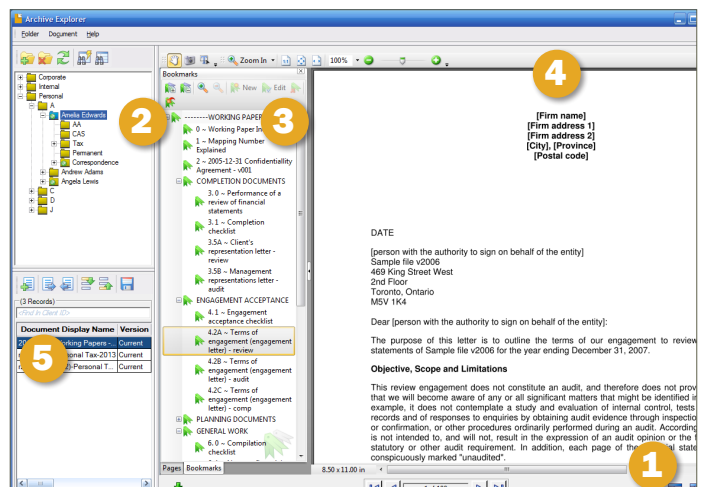
Efficiency is maximized when firms can locate documents quickly. With Doc.It Suite, the firm's naming conventions and retention policy are applied by file type, ensuring the client's engagement Work Binders – and ultimately the Archive – are forever in order.

Efficient Navigation

Locating files takes seconds because they are never misplaced with Doc.It Suite. The Doc.It publishing process locks down dynamic files and places the engagement and all documents used to support the work into the Doc.It Archive as one PDF file. Launch the Doc.It Archive Explorer and enter the client's name, and a folder tree with all files associated with that client instantly appears on screen.

Retention Policy and Purge Cycle

Doc.It applies your retention policy based on document type and alerts the firm to purge stored documents when they reach their expiration date. This automation and consistency saves time and reduces the firm's legal responsibility.



Navigating the Archive

1. Individualize the layout of screen.
2. Efficiently browse for files across entire client base.
3. Use bookmarks to navigate large documents.
4. Preview the file without launching the document.
5. Locate files when needed.

Doc.It®

7848 W. Sahara Ave.
Las Vegas, NV 89117

1425 Cormorant Drive, Suite 201
Ancaster ON L9G 4V5

888.693.6248 or 905.547.1100
info@doc-it.com | www.doc-it.com

© 2018 Doc.It® all rights reserved