

Policy Manager

The Doc.It® Policy Manager ensures compliance through effective policy management across your firm. The Doc.It Policy Manager applies the firm's file naming and location policy to all documents as they are gathered and then prepared for storage. When it is time to purge documents, the Doc.It Suite creates a list of purge documents based on the criteria assigned to each type of document using the Doc.It Policy Manager. The Doc.It Policy Manager further insulates the firm from litigation and the risks of eDiscovery.

- ✓ Designed to support your firm's tailored best practices approach to policy management
- ✓ Dictate how documents will be named based on document type (e.g. W2 or T4 may be named with different conventions than 1099)
- ✓ Dictate storage location for all document types
- ✓ Maintain librarianship of all documents
- ✓ Reduce compliance and regulatory risk

