Weiler & Company

DOC.IT ADDRESSES OUR FIRM'S BIGGEST CONCERNS: ARCHIVE STORAGE & SECURE FILE TRANSFER

DECISION-MAKING FACTORS WHEN CONSIDERING DOCUMENT MANAGEMENT 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:

- We believed Doc.It technology would take our firm to where we wanted to go.

- Doc.It does not require a long-term agreement. Doc.It's billing meant we could remain flexible into the future by not being forced into a long-term contract.

- Doc.It is priced on a per-license 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. Doc.It Suite integrates with CaseWare, which is another critical tool in our firm.

HOW WE USE DOC.IT

- We use the Doc.It Web 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 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® Suite

Doc.It Suite 4

Location: Guelph, Ontario

PRIMARY SOFTWARE USED IN THIS FIRM

Doc.It® Suite

CaseWare

CCH Tax Prep

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Doc.It® licenses

Learn how Doc.It® impacts work in our firm

DOC.IT ADDRESSED OUR FIRM'S BIGGEST CONCERNS

Two of our biggest concerns were archive storage and secure file transfer

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 Web 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 two or three licenses; rather, get licenses for everyone and require everyone in the firm to use the Doc.It technology.

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