

TOP 20 QUESTIONS TO ASK A DOCUMENT MANAGEMENT AND WORKFLOW SOFTWARE PROVIDER

Doc.It

- 1 Does it include an **implementation methodology that integrates the system with your firm's culture, practices and tools?**
- 2 Does the vendor offer **live support?**
- 3 Is the content of every document in the system **text-searchable?**
- 4 Does it include **Forms Recognition for automatic naming and organizing of scanned documents?**
- 5 Does it include **batch scanning tools** to simplify indexing during large volume back-scanning?
- 6 Does it have **centralized scanning with individual inboxes?**
- 7 Does it include **integrated tools for assigning, tracking and managing electronic work** when there is no paper moving through your office?
- 8 Does it **receive and store faxes electronically?**
- 9 Does it **effectively manage working documents and final documents independent of their original application?**
- 10 Does it include a **PDF Editor & customizable markup tools at no additional charge?**
- 11 Does it include and support **electronic signatures?**
- 12 Can you **retrieve a document you accidentally deleted?**
- 13 Does it have **a printer to create PDF files from any of your software programs?**
- 14 Does it have **email integration and document encryption for attachments?**
- 15 Does it **automate and enforce application of your retention policies?**
- 16 Does it **retain a complete revision history and audit trail** for all documents?
- 17 Does it **create an indexed PDF of an entire project** for simplified future referencing?
- 18 Does it allow you to **get your data out of the system at any time for any reason using logical file names in logical folders?**
- 19 Does it include a **secure client portal for file exchange at no additional charge?**
- 20 Are **all documents** in the system **accessible on a mobile device?**

