



### An easy, electronic method for approving documents.

Submitting documents for approval and tracking their progress can be time-consuming and inefficient. To speed up this process, Document Locator enables you to electronically submit documents for review and approval through a request for approval workflow. This method:

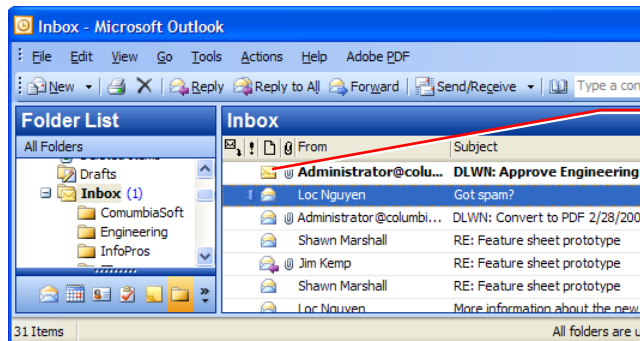
- Promotes consistent standards throughout your organization because the process is automated, it can be started from many activity dialogs in the system, and because administrators can require approvers to supply a password before approving documents.
- Allows you to approve documents from your Outlook email as well as in the Document Locator system.
- Enables you to track documents during the review and approval process, and provides an electronic audit trail.

### Standardized, secure approval process.

The automated notification and approval feature lets you create approval requests quickly and conveniently from a variety of activity dialogs in the application. For example, you can request approvals when creating, checking in, importing, or scanning and importing a document. You can also start an approval by simply selecting a request from a document's right-click menu. Approval routes can be saved and reused over and over, making it easy to adhere to consistent business process standards. The approval process can also be protected: administrators can require approvers to enter their user passwords before approving documents.

### Open, review, and approve a document from Microsoft Outlook.

You can receive your approval requests through Document Locator's internal messaging service or you can also receive and open your approval messages from your Outlook email.



Approval requests assigned to you display in your Outlook Inbox. Simply open the message to view approval details.

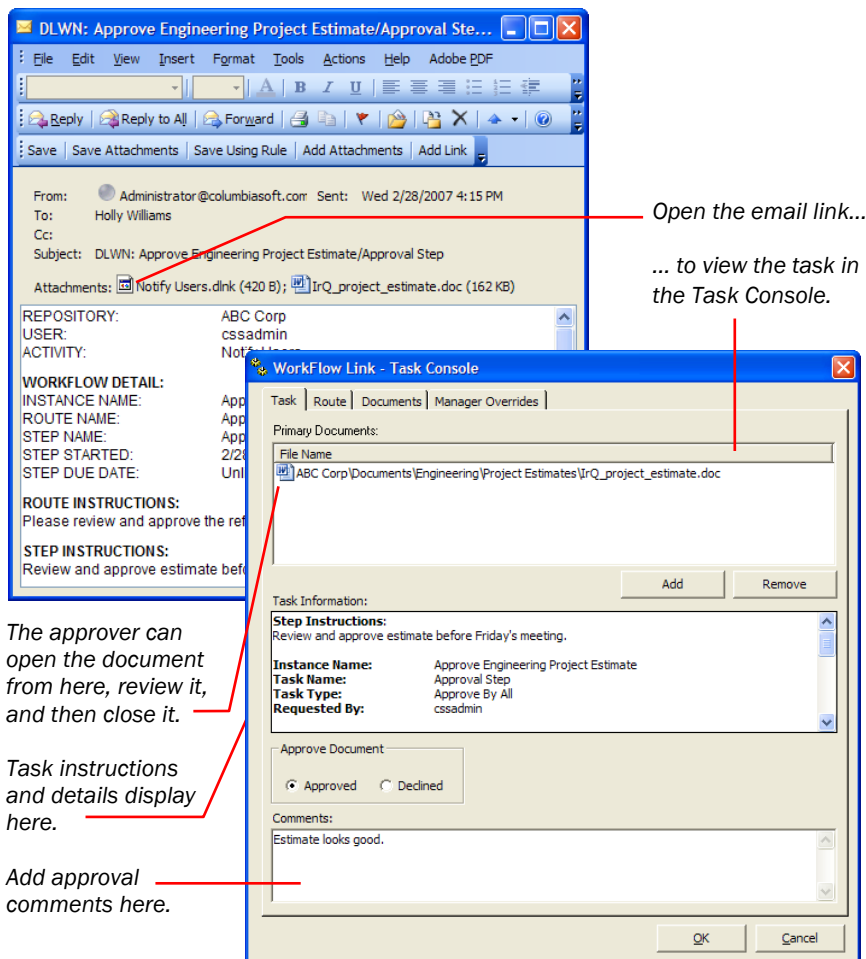
### Benefits

- **Automated reviews and approvals** – Reduces the time and complexities of document review with defined, electronic approval processes.
- **Convenience and control** – Provides convenient access to the approval process and enables the process to be password-protected.
- **Oversight and accountability** – Provides audit trails for tracking approvals and rejections, and helps build more effective review cycles.

### Solutions

- **Compliance** – Control information to be certain it meets regulatory and industry requirements before release.
- **Workforce** – Manage policies, procedures, and employee tools to approve and authorize documents.
- **Business accounting** – Scan invoices, purchase orders and contracts, then submit for approval prior to processing.
- **Procurement** – Submit purchase requests through defined approval steps before purchases are made.
- **Proposals** – Review and approve project proposals before they are distributed.

From Outlook, you can open the approval task in the Document Locator Task Console. Files listed in the Task Console are linked to their source documents, so you can open them directly from the Task Console.



Each approver can choose to accept or reject the document and its changes. If the document is rejected, the author can make the needed corrections and then resubmit the document. Declined documents can be resubmitted as many times as necessary.

### Track a document through the approval process and access approval history.

Document Locator provides a number of ways to keep tabs on a document submitted for approval:

- Track your requests for approval from your Submitted Tasks folder in the Workflow directory.
- Access the Task Console from a document's right-click menu to see where a document is in the approval process.
- View any document's complete approval history from the Workflow Details window.

### Related Features

- **Automated Workflow** – Create enhanced request for approval workflows that include conditional steps and team steps.\*
- **Email Management** – Set up email rules that request approval for imported email, attachments and faxes.\*
- **Importing Documents** – Request approvals when importing documents.
- **PDF Creator** – Convert approved documents to PDF for internal publication or to a Web site.
- **Scanning** – Request approval for documents as they are scanned and imported.\*
- **Security** – Require approvers to provide a password before entering the approval process.
- **Version Control** – Enable users to view only final, approved documents.
- **Web Access** – Enable remote users to request document approvals or approve documents via their Web browsers.\*
- **Workflow History** – Search the entire repository for approval workflow information, including completed, canceled, and active workflows.\*

For more information, visit: [www.DocumentLocator.com](http://www.DocumentLocator.com)

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\*Optional module required.



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