



Checking documents in and out provides an organized way for teams to collaborate on documents without the risk of overwriting data.

The Check-out / Check-in capability is a core feature that improves collaboration, drives versioning and auditing, and safeguards against information loss.

- Document check-in and check-out protects important business information.
- Other users are kept informed of a document's status.
- Check in documents from any supported application.
- Each document's log preserves a record of each check-out and check-in.

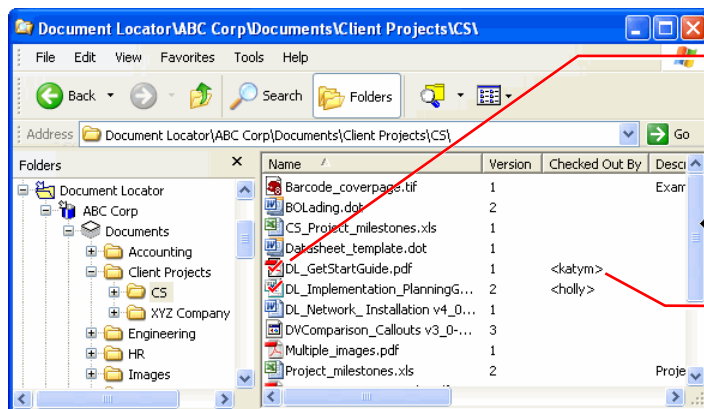
Protect important business information and keep it accessible at the same time.

The Check-out / Check-in feature:

- Prevents the loss of shared work.
- Ensures that users make changes to the correct version.
- Allows you to save your changes to the repository but keep the document checked out so you can continue to work on it.
- Allows others to view or print, but not change, a checked-out file. This way, users continue to have access to the latest approved version even while updates are being made.

Users always know when a document is checked out and who has it.

Each document can be checked out by only one person at a time. When other users attempt to check out the same document, Document Locator notifies them that another user already has it. Yet, other users can still view the document, so access to the information is preserved.



You can see a document's status at a glance because checked-out documents have a red checkmark superimposed on their icons.

The user who checked out the document is listed here.

Benefits

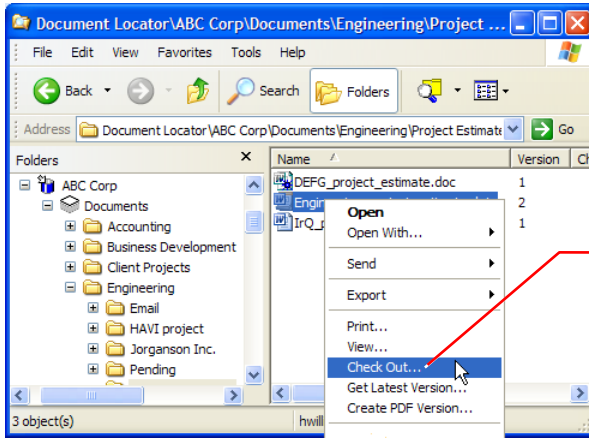
- **Improved collaboration** – Establishes an organized method for collaboration.
- **Preserved information** – Prevents accidental deletion of files from the server; prevents loss of information by preserving previous versions.
- **Familiar work environment** – Check-out and check-in documents from within native Microsoft applications and Windows Explorer view.

Solutions

- **Workforce management** – Administrators can review document check-out history.
- **Shared-file server alternative** – Replaces anarchy on shared file servers with an organized, efficient means for collaborating on documents.
- **Email alternative** – Rather than sending renamed draft versions of a document around by email, everyone works off the same document by checking it out and in.
- **Project management** – Sets organized structure for sharing of files among employees, contractors, and vendors.

Check-out is easy and the document automatically opens in the appropriate application.

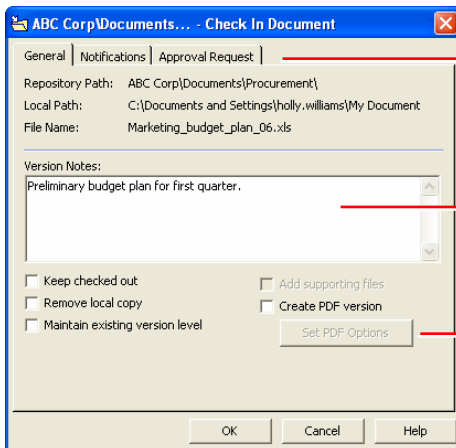
When you check out a document, it opens in its native application. You can always check out a document in advance and open it later when you're ready to make changes. You can also reopen, save, and close the checked-out document multiple times to continue working on it before you check it back in.



To check out a document, simply right-click the file and select Check Out.

Check in a document from an application window or from Windows Explorer.

Check-in can easily be done from a document's application window or from an Explorer window. The check-in process creates a new copy of the document in the repository and automatically increments the version number. To complete the check-in process, optionally add version notes, notifications, or request an approval.



You can send notifications and document approval requests during check-in.

Version notes remind others of the revision history and are searchable to help you find a document later.

You can also elect to save the document as a PDF file.

The Document Log keeps a record of every document action, including check-out and check-in.

Every time a document is checked out or checked in, the Document Log records when it happened, the name of the user who performed the action, the version of the document affected, and any associated notes. The Document Log cannot be altered nor can entries be deleted, so your audit trail is secure.

Related Features

- **Automated Workflow** – Manage your business processes with automated workflows you can access from the Check-In dialog box.*
- **Document Approval** – You can submit a request for approval when you check in a document.
- **Importing Documents** – Automatically check out documents on import.
- **PDF Creator** – Convert documents to PDF when you check them in, or at any other time from Windows Explorer.
- **Records Management** – Protect your business records and ensure compliance with government and industry regulations.
- **Searching** – Instantly view a list of all documents checked out to you. You can also search for all documents that are checked out.
- **Security** – Prevent users from checking out or editing documents containing sensitive information.
- **Version Control** – Automatically version modified documents as they are checked in.
- **Web Access** – Remote users can check documents in and out from their Web browsers.*

For more information about products or purchasing, please visit:

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