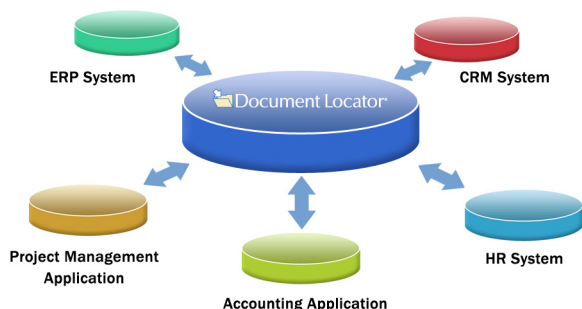




### Improve efficiency and leverage existing systems by integrating document management with your critical business applications.

ColumbiaSoft's Custom Integration Service integrates Document Locator with the important applications your organization uses every day. From finance and accounting software, to Customer Relationship Management (CRM) systems, to project management applications, Human Resources systems and more, you can now manage documents in a unified way across the entire company.



- Improve efficiency, collaboration, and workflow by enabling the entire company to use a single document management system.
- Realize cost savings, lower the user-adoption curve, and minimize the need for user training by deploying a system integrated with existing applications.
- Reduce risk: Link documents and communications to their related records in other business systems; search and retrieve information from within those other applications to ensure correct business actions and decisions.

### Extend document management across the enterprise.

Integrating Document Locator with your other applications improves everyone's ability to collaborate and manage company files. Integration provides a unified system that improves efficiency, document integrity, and enables standardization.

- **Efficiency** – Users don't need to leave the application they are working in to locate and access files in Document Locator. Participation in the same document management system makes possible new cross-functional efficiencies with notifications, workflow, and more.
- **Document integrity** – Comply with records management requirements. Users don't need to keep duplicate copies of documents in different systems because there is a centralized location for storage to which all users can be given access.
- **Standardization** – A unified system allows standardized metadata tagging, which eliminates inconsistencies and enhances document retrieval.

### Benefits

- **Integrated Document Management** – Integrates document management with your other business applications.
- **Leveraged Systems** – Keeps people working in the familiar applications they already use, while enabling people to keep track of documents on a company-wide scale.
- **Efficiency and Collaboration** – Improves collaboration, organization, and the ability to reference needed documents from within your business applications.

### Solutions

- **Project Document Management** – Enterprise-class document management supporting your important business applications.
- **Advanced Features** – Supports advanced document management capabilities, including workflow, imaging, version control, records management, and more.
- **Collaboration** – Improves remote sharing and retrieval of information with an effective replacement of FTP sites and shared file servers.
- **Best Practices Approach** – Experienced Professional Services team delivers custom integration to match your business needs.



Seamless  
Windows  
Integration

## Leverage existing systems and improve their value.

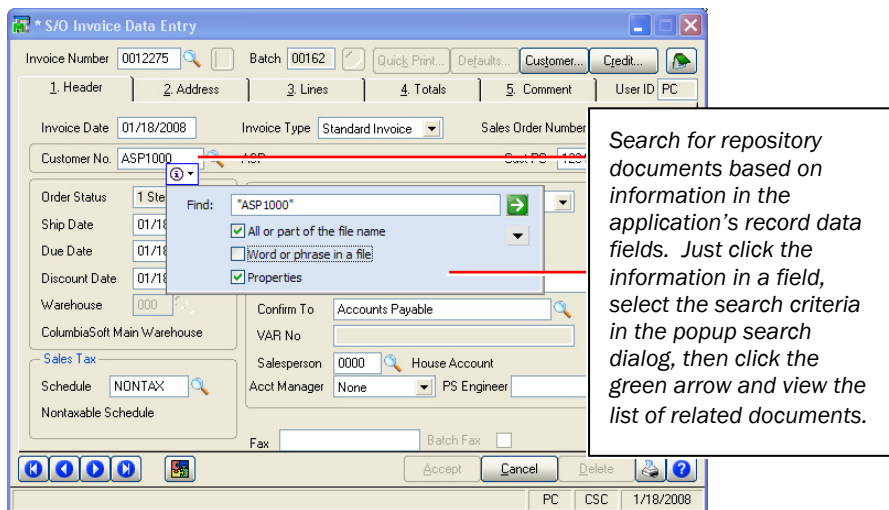
Organizations can realize significant cost savings because integration means employees can access documents from the applications they are already using and familiar with, reducing the need for user training on a new system, and lowering the user-adoption curve. Existing systems in turn become more useful because they now work with the company-wide document management system.

## Search and retrieve documents from within other applications.

Integration enables you to instantly search and retrieve documents stored in Document Locator right from within the integrated application. For example, documents containing an account number or customer name can be instantly retrieved from within an integrated accounting system or CRM application.

Integration includes two powerful search features:

- **Ad hoc searching** – Search and retrieve files with a simple key-and-click combination on any field inside the integrated application.



- **Preconfigured searching** – Perform a custom, preconfigured search with a hot-key or from the Windows Taskbar to immediately retrieve all documents related to a specific record. For example, searches can be preconfigured to find files related to Customer ID and Invoice ID values from within an accounting system.

## Advanced bi-directional integration

Document Locator supports methods of bi-directional back-end integration with other applications. At one level, metadata can be extracted from ODBC-compliant databases and automatically or manually applied to imported documents—ensuring that document metadata such as customer name and invoice number are correctly applied. Also possible are more advanced back-end integrations that enable you to automate sophisticated business processes through custom scripting. For example, this level of integration could be used to associate imported documents with records in other applications, making repository documents available from within those applications.

## Service Packages

We offer our expertise in document management solutions with Professional Services packages that are flexible and customized to address your specific business challenges. Our Best Practices approach to Professional Services is defined by Project Management Body of Knowledge standards developed by PMI-certified professionals.

### Custom Integration Service package includes:

- Professional Services installation and customization
- SDK (software development kit)
- Integrated search powered by DL Fusion technology

For more information about products or purchasing, please visit:

[www.documentlocator.com](http://www.documentlocator.com)

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