



Extensive Configuration Features Offer Business Process Capabilities

Scanned documents are recognized and data elements extracted to automate storage and document routing.

By Glenn Gordon

The name “Document Locator” may conjure up pictures of the most efficient secretary you ever had ... or an electronic list of all your documents and which file cabinet they are in. While the ColumbiaSoft product bearing that name does find stored documents with great efficiency, the name hardly prepares the user for the depth of function Document Locator provides – not just in storing and retrieving documents, but also in managing and using those documents in an office environment.



Features

Document Locator is tightly integrated with Microsoft (MS) Office applications, yielding an instantly familiar interface. Drag-and-drop operations and search from the MS Windows Explorer toolbar are just two of those operations. Full text search is possible, and searches using multiple criteria can be created and saved.

Document Locator impresses most by its ability to configure itself to manage documents to an extraordinary degree. For example, scanning documents into the system doesn't have to leave a large group of files waiting assignment to the proper folders. Instead, Document Locator can be configured to recognize the type of document scanned, pull and store pre-selected data from the document, place it in the proper folder, and initiate business processes based on the document status. These types of features allow the user to create automated workflows for document routing, review and approval. The application also has extensive version control capability and a checkout system that maintains availability while avoiding simultaneous document modifications.

Document Locator is available with several optional product modules that extend its capabilities, including a scanning function with Optical Character Recognition (OCR) capability, the Email Manager and a WebTools module, extending document management with remote access via the Internet.

Testing the System

To allow prospective buyers (not to mention reviewers) to test Document Locator without downloading and installing the application, ColumbiaSoft recently put into place an online “sandbox” that I found most helpful to delve into the features the software offers. When I launched Document Locator, I found it


appears in a MS Windows Explorer window with the address window showing the repository in use. Clicking the Folders button displayed the repository hierarchy in the familiar Explorer view, making me feel instantly at ease. I created some client folders within a Collection Agents folder, exactly as I would in Explorer. Since I had administrator privileges, the Repository Configuration icon allowed me to open up the list of management tools, such as Column Configuration Manager, Folder Structure Manager and 15 other similar functions.

I chose the Profile Manager, since it highlights some of the otherwise hidden functions that give Document Locator its power. A Profile is a set of special properties attached to a document that lets you store, find and use documents quickly based on their content and related data – not just their file names. The properties for a profile called Disputes, for example, could include numerous account identifiers and legal status, any or all of which could be made required properties for that profile. Adding a profile to a folder causes all documents added to that folder to be assigned that profile, assuring that any associated documents will have the accompanying properties.

Support

Document Locator comes with live telephone support weekdays from 6 a.m. to 6 p.m., Pacific Time, excluding holidays. For less urgent needs, support by online form or email also is provided. A yearly maintenance fee offers continued support and downloadable software updates from the company portal. A three-day training course is available for new customers, and a WebEx-type connection is available for interactive resolution of problems.

Summary

In addition to providing convenient document storage and retrieval, Document Locator includes an extensive set of configuration tools and features that allows the enforcement of consistent business practices in document management. 

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