



Document Locator®

VERSION  
**5.2**

**Transforming Business**  
Enterprise-Class Document Management

## What's new in Document Locator version 5.2

Transform your business with the latest generation of enterprise-class document management from ColumbiaSoft. Document Locator v5.2 introduces added capabilities to improve compliance, reduce risk, and share information in areas of email management, document delivery, digital signatures, and more.

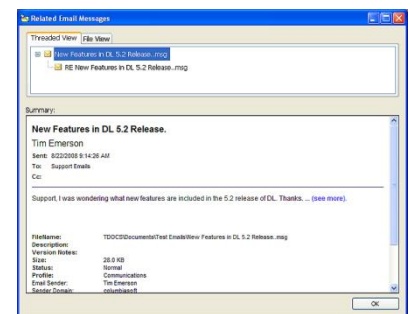
### *Email Compliance*

**NEW: Email Archive** (optional\*)

Information managers, compliance officers, and IT administrators charged with corporate email systems who are concerned with compliance, eDiscovery, storage management, disaster recovery, and message retrieval can resolve these critical issues using Email Archive to automatically capture a record of all incoming and outgoing messages, including attachments.

Document Locator delivers unique benefits by including email records within the same document management system used to control and manage all other types of unstructured information. Administrators can search and instantly retrieve messages and attachments for compliance, eDiscovery, and other legal matters. Consistent records management policies can be applied across all kinds of information, regardless of file type. IT can easily back up and recover critical communications records from a central repository. The efficiency of email systems, and their operational costs, is improved because archiving can offload dependency on email servers. Finally, the frustrating task of researching and retrieving “lost” or deleted email messages is made easier – and can even be securely delegated to users. Email Archive includes these features:

- A “look-back” capability that allows you to capture past messages sent, received and saved in mailboxes.
- An email threading view that simplifies the research and organization of entire message conversations.
- Automated de-duplication that minimizes storage requirements.
- A compatibility with prior versions of Microsoft Exchange Server as well as the new Exchange 2007 ‘enveloping’ format.



A new Email Threading view in Email Archive makes it easier to research and view message conversations.

### *Document Delivery*

**NEW: DL FastPack** (standard)

DL FastPack lets you quickly organize, package, and deliver files to others or archive them offline with ease. Using DL FastPack, you can gather and organize files in a new Collection window and quickly package information onto DVD, CD, USB flash drive, or any other connected media device. Information is saved in a “FastPack”, where it retains its folder structure. Each FastPack supports self-contained browsing and searching on Profile and Property metadata via a built-in user interface.

Project managers, administrators, and users who need to deliver files or archive information will value the simplicity and power of this new built-in feature. The ability to organize and package files for delivery to others – even people who might not be Document Locator users – delivers significant benefits:

- You can search for relevant documents and publish them on read-only media for legal discovery or outside counsel.
- Records managers can move documents to off-line retention.
- Managers can distribute the latest versions of documents to employees at remote offices, to customers, or vendors.
- Project managers can gather, organize, and deliver documents in searchable form at project turnover or close-out.
- Individuals can archive project documents or related files.

## PDF's & Digital Signatures

### NEW: [Adobe® Acrobat® Integration](#) (standard<sup>1</sup>)

New integration with Adobe Acrobat extends your ability to manage PDF files – *including digital signatures* – within the document management system, and gives you access to many of the same Document Locator menu commands inside Acrobat as are found in Microsoft Office applications.

Users can now check-in and check-out documents from within Adobe Acrobat using new Document Locator options available from Acrobat's file menu. Benefits of Acrobat integration include:

- Leverages Acrobat's digital signatures which can have legal validity for electronic business processes, and preserves integrity and authenticity of documents.
- Documents with certifying signatures validate automatically at the recipient's end when viewed with Adobe Reader.
- Allows you to use Acrobat's digital mark-up to improve communication in collaboration and workflow processes.

## Customizable Notifications

### UPDATED: [Notifications and Workflow](#)\*

Notifications drive effective collaboration, and whether it's a subscription notification, a simple request for review or approval, or a complicated workflow process, each notification message is a visible and often recurring touch point among users. Now, with version 5.2, notifications can be leveraged to deliver your own customized messaging for branding or legal purposes.

New notification template options allow administrators to create and offer multiple HTML- and text-based notification messages based on a type of event or recipient. For example, customized notifications could include company or client logos, confidentiality statements, or legal messaging.

- Design custom notification templates to personalize your notification messages to employees, customers, or vendors.
- Include confidentiality statements or embed website links.
- Add company logos, graphics, signatures, and more.

## User Delegation in Workflow

### UPDATED: [Workflow](#)\*

Workflows maintain accountability, but sometimes a workflow participant is unable to perform their task. A new workflow delegation feature in version 5.2 makes it possible for workflow creators to give their workflow team members the option to delegate their task to an alternate workflow recipient.

- Allows workflow recipients to transfer responsibility for a task to others.
- Delegation rights can be enabled or disabled at each step in the workflow processes.
- Adds flexibility for workflow participants to control variability in a process and to ensure steps are completed by the most appropriate person.

### UPDATED: [Additional Enhancements](#)

- Copy files from Document Locator to another location using right-click / drag-and-drop menu.
- Manual entry option for adding new users from Active Directory.
- Primary user controls now include configurable columns.
- Additional screens include resize logic.

\* Certain features are optional.

<sup>1</sup> Requires Adobe Acrobat, not included. Supports integration with Adobe Acrobat 8.0 and later.