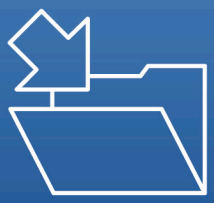
Document Locator®

Feature Datasheet > Quick Facts



Document Management Software

Powerful capabilities within an intuitive, versatile, and comprehensive enterprise document management system.

Document Locator® is comprehensive enterprise document management for everyone, delivering full capabilities right where people work inside the Microsoft® Windows® environment. Regardless of size or industry, Document Locator increases business efficiency and collaboration, and reduces risk by enabling high standards of compliance and business continuity.

Capture. Secure and harness your unstructured business information.

Import paper, electronic documents, and email in multiple ways:

- Import documents using standard Windows operations such as drag-and-drop, copy-and-paste, or right-click and select.
- Import documents from any application that supports the Windows Common Dialog (through the Save As function).
- Scan documents into Document Locator in batches or ad hoc.
- Use the optional Automated Email Rules Module to automatically import and profile Outlook email (with attachments), and faxes.
- Import documents one at a time or thousands in bulk and full-text index them as they are saved.

Manage. Organize, profile, and easily find your business information.

Organize, manage, and protect information using these features:

- Automatically create directories and folders as you import documents.
- Add document notes and other metadata to documents as they are imported so you can find them later.
- Track documents through the creation and editing process, and automatically build a history of document activity.
- Use document versioning to ensure no changes are ever lost.
- Find any document in seconds using comprehensive search tools.
- Apply security and auditing to documents, folders, and directories.
- Apply records management practices to comply with government regulations such as e-Discovery, Sarbanes-Oxley, HIPAA, and FDA.
- Manage email and attachments with full security and auditing.

Benefits

- **Document management for the enterprise**
  Provides everything you need to manage business documents and records, automate business processes, and achieve greater business efficiency.
- **For everyone**
  Provides all the capabilities of ECM needed by businesses of all sizes, right where people get their work done.
- **Familiar work environment**
  Integrates seamlessly into Microsoft Windows and Office applications, keeping users within applications they already use to maximize user adoption.

Solutions

- **Shared-file server alternative**
  Replace anarchy on shared file servers with organized, efficient means for collaborating on documents.
- **Process automation**
  Define and automate business processes and enforce adherence to company procedures.
- **Security**
  Manage access to documents, folders, and tools using role-based security configurable down to the file level.
- **Regulatory compliance**
  Manage business records and appropriately catalog and store email to ensure enterprise-wide consistency and adherence to regulations.

(800) 298-1172
www.documentlocator.com

ColumbiaSoft™

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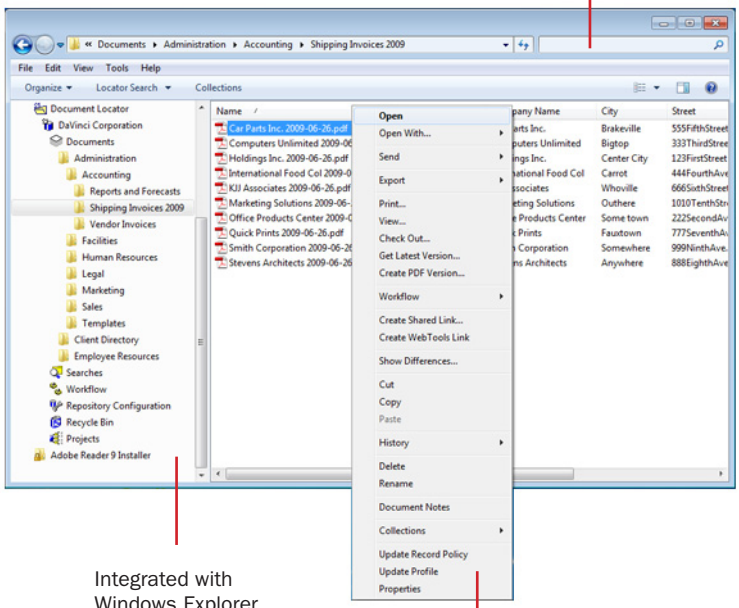
Share. Improve your workgroup collaboration.

- Send notifications and approval messages via email, internally, or both.
- Check documents in and out. The Check-out/check-in feature provides an organized way for teams to collaborate on documents without the risk of overwriting data.
- Convert approved documents to PDF quickly and easily with integrated PDF Creator. Flexible security options enable you to share sensitive documents while preventing them from being altered, printed, or copied.
- Automate your business processes with the Automated Workflow Module. Use workflows to route documents automatically and to enforce consistent and auditable business practices.
- Make internally hosted documents available beyond the firewall using secure remote access provided by the optional WebTools and WebView modules.

Familiar interface makes the system easier to use.

Document Locator is fully integrated into Microsoft® Windows, Office, and Outlook, so you're just a right-click away from easy document management. You can perform nearly all document management functions from the Windows Explorer view, including accessing search tools, document comparison tools, document and history logs, security, repository configuration tools, PDF conversion tools, and more.

Locator Search toolbar is integrated with Windows Explorer.



Integrated with Windows Explorer.

The right-click menu gives you access to the most commonly used document management features.

Related Features

- **Automated Workflow**
  Automate your business processes.*
- **Check-out and Check-in**
  Prevent loss of data and unnecessary multiple copies of documents.
- **Custom Action Manager**
  Integrate Document Locator with third-party and custom applications.*
- **Document Approval**
  Automate your document approval process.
- **Document Profiles**
  Use unique profiling information to organize and find documents.
- **Email Management**
  Automatically profile and import email, attachments, and faxes.*
- **Importing Documents**
  Easily import hundreds of documents.
- **PDF Creator**
  Create robust PDF documents without buying a separate application.
- **Records Management**
  Ensure compliance with government and industry regulations.
- **Scanning**
  Automatically batch scan, profile, and import documents.*
- **Searching**
  Locate documents instantly.
- **Version Control**
  Always know you are working with the correct version of a document.
- **Web Access**
  Enable remote users to access Document Locator repositories.*

* Optional

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