Professional Services

Experts in information management, at your call.

Services and Training

ColumbiaSoft™   Document Management Software
for Microsoft Windows

We're ready to help

Years of expertise and a best practices approach translates to time and money saved when using our Professional Services. From deployment and migrations, to system integrations and core business process improvement, our team of experts are ready to help.

A roadmap for success

Installation > Configuration

Migration <

Integration > Training
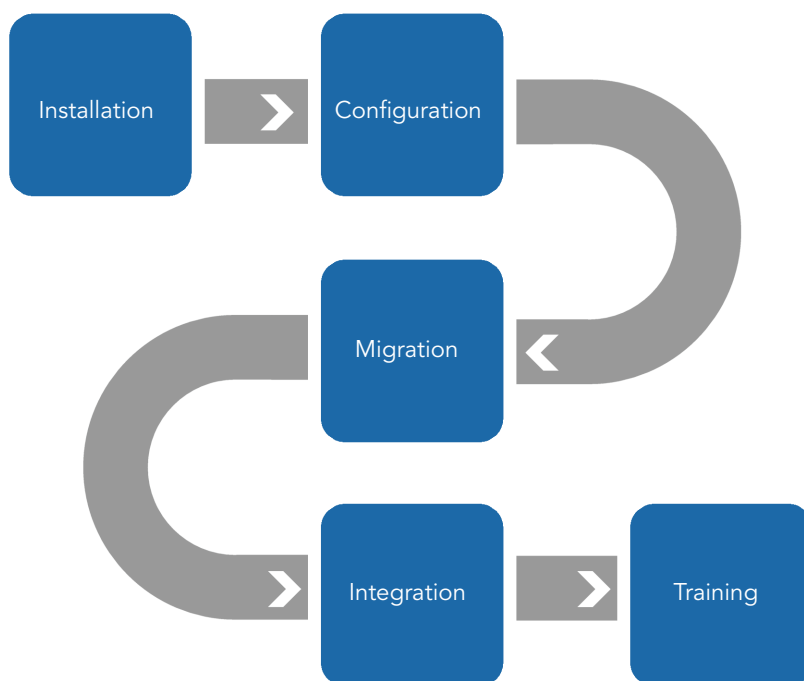
Services for every need

Choose the services that match your own project needs. Our Professional Services team will take a custom-tailored approach to your business requirements.

Reduce the time to deployment; implement business automation; or have us engineer custom solutions. We'll help at each step, and when your solution is deployed, we'll help you ease users into the system with training.

DL Document Locator

Our team of experts are ready to help you with solutions built on the Document Locator platform.

Service options

Select the services that match your needs depending on your available resources or technical expertise. Talk to your ColumbiaSoft account representative to learn more.

Step	Description
Installation	Install software on server(s) and client machines. Professional Services can augment your IT team or outside IT services provider to perform software installation.
Configuration	Configure repositories, user settings, workflows, records policies, and more. Professional Services will get you up and running with system configurations.
Migration	Migrate files and data from shared folders or legacy systems; or configure a scanning project to move paper from filing cabinets to digital repositories.
Integration	Connect repositories of files, documents, and metadata with any number of business systems. Consistency, productivity, and ease of access are all improved.
Training	Bring admins up to speed and ease users into the system with training options that include a 3-day boot camp course, a Masters series, and custom onsite training options.

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Business Process Improvement	Have underlying business processes analyzed by Professional Services and receive recommendations for best-practice improvements using automation and information management.
Solutions Engineering	Deploy custom-tailored business solutions in accounting, quality, operations, human resources, customer services… virtually any area of business can benefit.

Information management is our expertise

Your source for experienced business consultants, with a long, distinguished record of satisfied customers.

From major installations at Fortune 500 companies, to departmental deployments in small to mid-size businesses, our Professional Services team has travelled the globe solving information management challenges of all sizes. Their years of experience and laser-focused dedication to improve document-centric business processes make them your first choice for outside assistance.

Advanced document management know-how

Professional services can assist you with any area of design and configuration involving the Document Locator system. From building custom reports, to configuring document workflows, the PS team is able to assist.
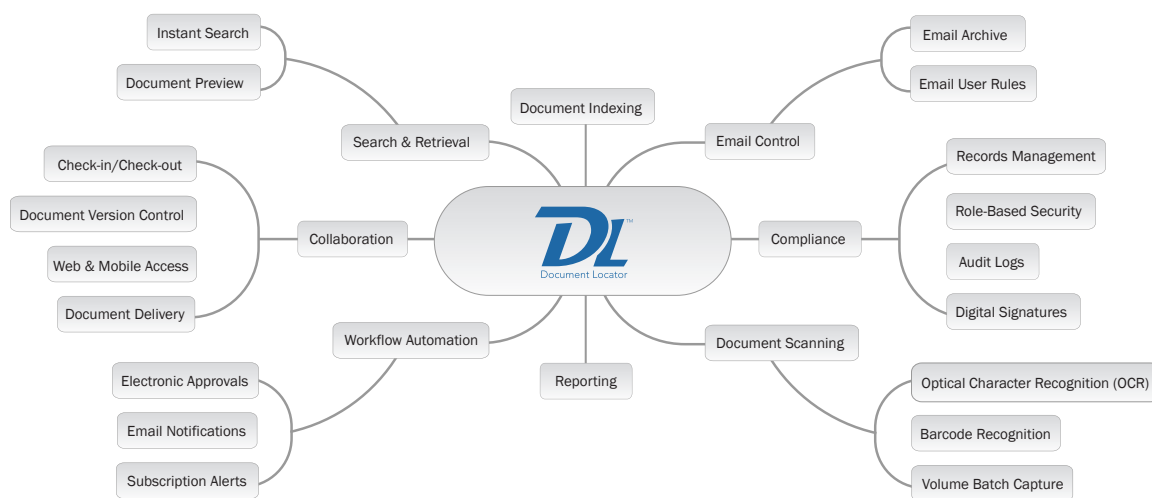
A well planned approach

From start to finish, every project is planned for success.

A project leader will be your primary point of contact for all matters related to the your project. Your project will be managed to completion in an iterative process with a continuous loop for feedback.

Statement of Work
High-level requirements and rough estimates of budget by project phase are identified. The SOW also lays the groundwork for project scope and establishes roles and responsibilities.

Discovery
Details of specific objectives and all related project scoping, budget, and timeline are identified. Once underway, changes and their impact on the project are documented via change request.

Design
Requirements and methods are defined after working directly with business process owners, implementation teams, and IT staff.

Implementation
Expert resources within ColumbiaSoft will fully develop and implement the project according to project specifications.

User acceptance testing
Testing is performed using real documents and test cases to validate the system prior to release.

Training
Admins and users alike are brought up to speed for a smooth and successful launch.

Production
With training, implementation, and user acceptance testing complete - the system is ready for production.

Real-world experience in everyday business solutions

- Accounting
- Customer Service
- Quality and Compliance
- Operations
- Vendor operations
- Manufacturing
- Business administration
- Information Systems
- Human Resources
- Contracts and records

Problem solved

A case study in employee review automation

In manufacturing, where every product must be perfect, it's essential that employees are fully trained and certified. Annual employee review processes are critical. The problem is that employee review procedures are laden with paper, and are at the mercy of busy schedules.

At a large manufacturer in California, employee reviews are no longer the manual, labor- and time-intensive operation they once were. The Professional Services team designed a system that notifies individuals when their reviews are pending, routes forms to the appropriate parties, and keeps comments and signatures paperless. Here's how it works:

- Automatic notifications inform Human Resources 45 days prior to an employee's review cycle, requesting a new review package.

- A notification is distributed when the review process isn't completed within 15 days of the employee's review cycle date.

- If the employee does not return a counter-signed review form within 5 days of the review meeting, a final reminder is sent.

- Reports keep managers and Human Resources personnel informed of which employee review reviews are due soon, and highlight past due review cycles.

Practical training options

Administrators and users alike develop skills in the document management system through practical training opportunities.

3-Day Boot Camp

An ideal way to develop skills at nearly everything in the document management system. The in-depth, hands-on sessions provide a thorough study of document management procedures and best-practices. Administrators and users gain from expert knowledge of system functionality. Topics include:

- Creating folders
- Profiles and properties
- Document import
- Document modification
- Document information
- Searching
- Views
- Document retention

- Workflow
- Security
- Folder structure manager
- Auto path templates
- Document information
- Scanning
- WebTools

"
By attending your training session, I have managed to learn even more helpful information and to focus more on the areas we currently do not use that we would like to begin implementing."

Prairie State Generating Company

DL Masters Series

Expand skills in specific areas of document management. DL Masters courses are 1-day training sessions held periodically that cover a single topic in detail. They provide a thorough understanding of functionality and business benefits.

Custom training event

Custom and onsite training options provide full flexibility in aligning a training event to your own objectives. For example, you might want to train a large number of users in focused tasks; or you might want to train a group of admins on advanced operations. Whatever the need, Professional Services will work with you to plan a successfully training event.