



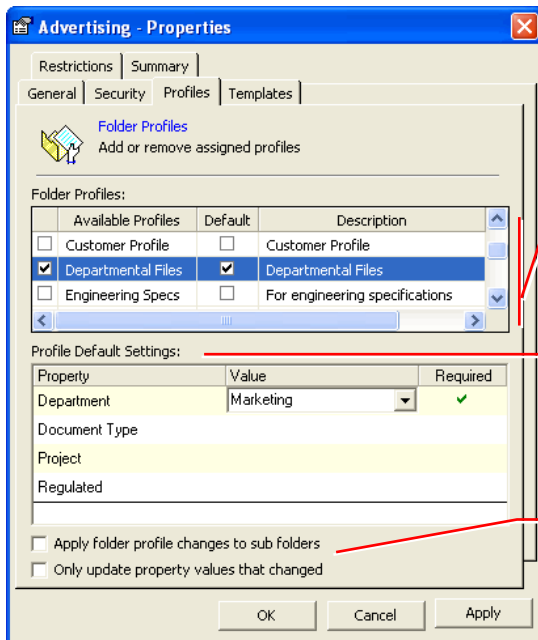
Organize, standardize, and protect critical business information using intelligent folders.

Document Locator's intelligent folders are more than just receptacles for documents. Document Locator folders have configurable properties that include security settings, Profiles (metadata) associated with the folder, templates associated with the folder, and restrictions that control how these and other organizational elements are applied to documents created in or imported to the folder.

Automatically organize and profile the information in your folders.

Profiles associated with a folder help standardize the metadata available for documents stored in the folder. You can configure folder settings to:

- Automatically apply Profiles to documents imported to folders. Profiles attach descriptive metadata to documents, making them easier to categorize, store, and retrieve.
- Require users to select from a list of Profiles when creating documents within the folder, maintaining consistent document organization.
- Automatically apply Profile settings to sub-folders.



For example, whenever a new document gets created in this Advertising folder, a user can select from one of these pre-assigned Profiles.

To make Profile selection easier, you can set a default Profile with pre-filled metadata values.

You can set Profile changes to apply automatically to sub-folders as well.

Benefits

- **Automated organization** – Determines which document Profiles are available at the folder level and maintains organization of documents within.
- **Standardized document format** – Ensures documents are created using the correct, approved templates, which enforces your business rules.
- **Secure documents** – Applies security automatically to documents placed in the folder, providing improved control over who has access.

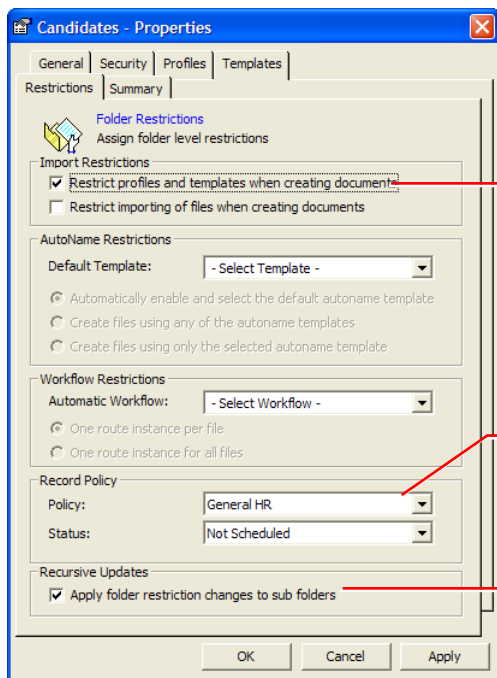
Solutions

- **Shared-file server alternative** – Establish greater organization and control over documents with intelligent folders that govern file requirements, Profiles, record policies, templates, access, and more.
- **Security** – Control view and access rights for folders and their contents. Documents automatically inherit security settings of the folder into which they are imported.

Enforce document consistency throughout your organization.

Templates associated with a folder can help speed up document creation and also ensure that documents contain the right information, present a consistent format, and meet your business rules. Folder restrictions, in addition to governing how Profiles and templates are applied to folder contents, include controlling how files in the folder are named, which record policies are applied, which workflow is associated with documents imported to the folder, and whether or not these settings are applied to sub-folders. Use folder template and restriction settings to:

- Ensure that new documents in a given folder are always created from a specific template or templates (you can associate more than one template with a folder).
- Enable the use of auto-naming templates that automatically name files as they are imported to the folder.
- Assign a workflow to the folder so that the workflow will start each time files are imported to the folder.
- Assign a record policy to documents imported to the folder.



To access a folder's properties, just right-click on the folder and select Properties.

Select to enforce the use of templates and Profiles associated with this folder.

Associate a record policy with documents that are imported to this folder.

Apply restrictions to sub-folders.

Related Features

- **Automated Workflow** – Automate your business processes with workflows.*
- **Document Approval** – Request approval automatically for documents imported to folders.
- **Document Profiles** – Create custom Profiles and Properties to add metadata to your folders and documents.
- **Folder Auto Path Templates** – Create folders automatically for documents as they are imported.
- **Notification Subscriptions** – Receive a notification when a subscribed-to event occurs on a designated folder.
- **Records Management** – Associate record policies with your folders to ensure sound record-keeping practices.
- **Scanning** – Automate scanning and importing documents to folders.*
- **Searching** – Locate documents and folders based on profiling information.
- **Web Access** – Enable authorized remote users to access a repository and create and use folders.*

For more information about products or purchasing, please visit:

www.documentlocator.com

ColumbiaSoft Corporation
10300 SW Greenburg Rd.
Suite 180
Portland, OR 97223
(503) 274-0504
(800) 298-1172

*Optional module required.

Security properties control access to a folder and its contents.

To protect important business documents (such as templates and forms) from unauthorized changes, you can set security at the folder level that restricts access to the folder and limits who can add, delete, or modify its contents.

- Security settings restrict who can access files and folders, and even who can view them.
- Audit settings record document and folder-related events, such as attempts to view or alter secured data.



Seamless
Windows
Integration

ColumbiaSoft™
Capture, Manage, and Share Information

800.298.1172 | www.DocumentLocator.com