Document Locator[®]

Feature Datasheet > Importing Documents



Seamless integration with Microsoft Windows makes importing documents fast and intuitive.

With Document Locator, you use familiar Windows operations to import files, so you can start managing documents immediately.

- Import documents using standard Windows operations such as drag-and-drop, copy-and-paste, or right-click and select.
- Import quickly—between 50 and 100 documents per minute, depending on document size and computer speed.
- Access imported documents immediately.
- Organize directories automatically. Document Locator recreates the original folder hierarchy by default when importing folder contents.

Simply drag and drop a folder to bulk-import thousands of files at once while preserving the folder hierarchy.

Whether you're importing files on your computer or files stored in field offices around the country, bulk importing is a snap. Dragging a root directory into the repository brings every sub-folder along with it.

Capture documents from many sources, then organize them with folders in Document Locator.

In addition to drag-and-drop, Document Locator makes it easy to pull in a set of documents from several sources, then organize them in the repository under one or more folders. You can browse for the documents you want to import and simply add them to the Document Importer dialog box. When importing:

- You can add Profile and other metadata information such as version notes and document descriptions.
- Imported documents automatically inherit the security settings of the destination folder.

Benefits

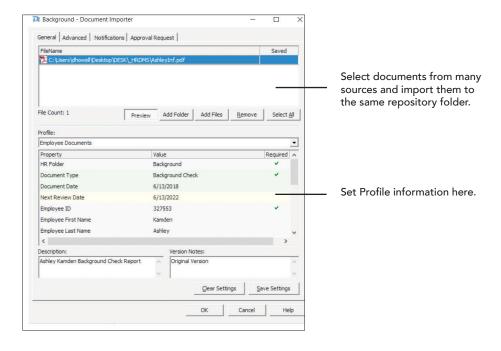
- Immediate deployment
 Bulktransfer files in one drag-and-drop action while preserving folder hierarchies.
- Fast user adoption
 Integrates document management functions right where people work using familiar Windows right-click and drag-and-drop operations.
- Instant file access Indexes information immediately upon import to provide instant searchability and access.

Solutions

- Shared-file server alternative Replaces anarchy on shared file servers with an organized, efficient means for collaborating on documents.
- Information security
 Protect important business documents
 from accidental deletion. Original copies of
 documents remain on the file server until you
 choose to delete them.
- Regulatory compliance Import and properly index email and other documents for secure storage and easy retrieval.







Imported files are easier to manage and find.

Features like document Profiles, version notes, and document descriptions make for more productive searches that allow you to find files immediately based on categories, keywords, and other metadata. Document Locator's search tools provide the means to search on nearly all aspects of a file: content, name, type, dates, events, status, user activity, notes, version, and more.

Related Features

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.*

*Optional module required.

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