DL ® Document Locator

Document Management Software

Schedule automated tasks using the Task Manager.

Using the Task Manager, you can automate routine tasks that need to be performed at regular intervals, such as archiving documents, importing scans, and checking documents in to the repository at the end of the day.

- Ensure routine but important tasks get carried out on a regular basis.
- Free up resources for other work by automating routine tasks.
- Create flexible, secure automated tasks. Integration with the Windows task scheduler gives you flexibility and security.

Schedule automated "housekeeping" tasks to free up resources.

Rather than relying on users to remember to carry out repetitive tasks, you can schedule Document Locator to remember to do them automatically, enabling workers to spend more time on projects that require human attention. Automation makes it easy to ensure routine tasks get done on time and on a regular basis, and at a time that best suits your organization's workflow. For example:

- Schedule bulk imports and other network-heavy tasks after hours to free up network bandwidth during business hours.
- Schedule to delete temporary copies of checked-out files in the working folder on your computer after they have been checked back in at the end of the day.
- Schedule to automatically archive files, update a record policy, or delete files.

Check "watch" folders for new arrivals to process.

You can create a task that periodically checks network "watch" folders for new document arrivals and then processes them according to task settings.

- Import documents from a network folder.
- Copy or move files within a repository to another folder for processing, or to another repository.
- Start a request for approval workflow, or other workflow, for files in a specific folder.

Automatically import batch scans.

When coupled with the optional Scan Station Module, the Task Manager can automatically perform a batch import on scanned files located in a monitored folder. For example, if your company's high-speed scanner stores images on a shared file server, you could create an automated task to import those scanned images at regular intervals into Document Locator. If you also have the optional SmartBatch Add-In, you can automate the importing of mixed batches of scanned documents. Flexible action options are designed to meet your needs.

Benefits

- **Network productivity**
  Optimizes network performance by scheduling tasks during non- business hours.

- **Automated "housekeeping"**
  Ensures routine but important processes, such as clearing old files, importing files, etc., are automatically carried out at scheduled times and in a consistent manner.

- **Flexible, secure automation**
  Schedules document management tasks using Windows task scheduler, adding flexibility and security to scheduled tasks.

Solutions

- **Efficiency**
  Schedule bulk imports and other network-heavy tasks after hours to reduce network traffic during peak business hours.

- **Process automation**
  Import and profile documents from specific folders at regular intervals.

- **Security**
  Ensure controlled documents are checked back in to the repository at the end of the day.

(800) 298-1172
www.documentlocator.com

Microsoft Partner | Gold Application Development Gold Cloud Platform | Autodesk® Authorized Developer | Adobe Solutions Network Commercial Developer

Flexible action options are designed to meet your needs.

The Task Manager gives you a wide variety of options to meet business needs. When you create a task that requires additional settings, such as importing or checking in documents, you can predefine the processing requirements you want the task to use.
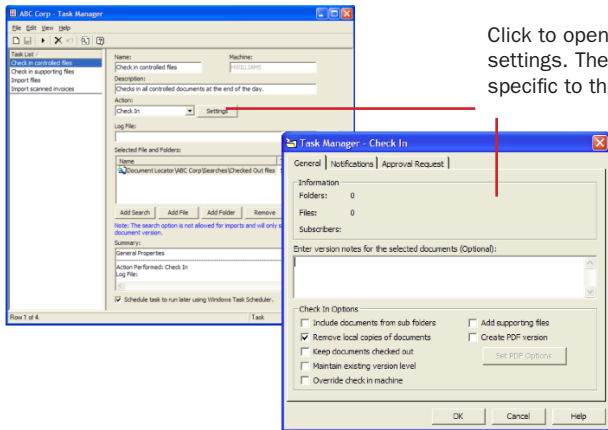
Click to open action option settings. These settings are specific to the selected action.

Integrated with Document Locator saved searches.

If the documents on which you need to perform a scheduled task do not all reside in the same folder, you can create and save a search that finds those documents and then incorporate the search into your scheduled task. For example, you can create a search that finds all documents checked out to a specific user and then schedule to have them automatically checked in at a set time.

Windows task scheduler provides flexible scheduling options.

The Task Manager is integrated with the Windows task scheduler to give you flexible scheduling options. For example, you can:

- Schedule a task to run once and then be automatically deleted.
- Schedule a task to repeat at regular intervals indefinitely or until a specific cutoff date.
- Schedule a task to stop at a given time or after a set number of hours and minutes.
- Run tasks manually at any time.

Secure automation.

Tasks are run based on NT user credentials and Document Locator security privileges—users must enter a password to schedule tasks. In addition:

- Scheduled tasks are machine-specific and can be configured to run only if the person who scheduled the task is logged on.
- Tasks can be configured to require a password before running.
- As with all Repository Configuration tools, access to the Task Manager can be restricted.

Related Features

- **Automated Workflow**
  Create workflows and schedule them using the Task Manager.*

- **Check-out and Check-in**
  Use the Task Manager to schedule checking in and checking out documents.

- **Document Approval**
  Schedule to automatically start the approval process for documents.

- **Document Profiles**
  Attach descriptive metadata to documents, making them easier to categorize, store, and retrieve.

- **Importing Documents**
  Schedule to automatically import documents.

- **Notification Subscriptions**
  Receive a notification when scheduled tasks complete.

- **Records Management**
  Use the Task Manager to schedule updating document record policies.

- **Scanning**
  Schedule to import bulk scans automatically using the Task Manager.*

- **Scanning Add-Ins**
  Use the Barcode Add-In to capture bar-coded information from scanned documents; use the SmartBatch Add-In to automate scanning mixed batches of documents.*

- **Searching**
  Create and save custom searches to use in scheduled tasks.

* Optional

(800) 298-1172
www.documentlocator.com

ColumbiaSoft Corporation
15495 S.W. Sequoia Parkway
Suite 190
Portland, OR 97224