

Improve collaboration and prevent loss of information with automated version control.

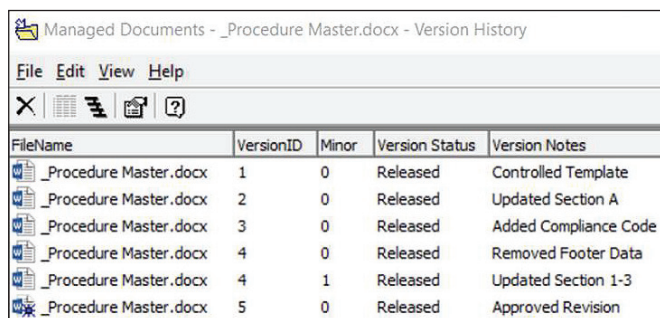
Document Locator's Version Control feature automatically maintains previous document versions and enables users to know at a glance which is the most current version.

- Automatic versioning ensures document changes are recorded and that the changed information is retrievable.
- Version control improves collaboration and promotes project quality.
- Version control provides an audit trail of document changes over time.

Version control manages file versions automatically.

Document Locator automatically assigns a version number each time a file is checked in with changes, making it easy to track changes over time. Automation also:

- Eliminates the use of inconsistent or ad-hoc naming conventions to manage file versions, and the reliance on users to remember to manually version documents.
- Enables you to always know which version of a document has the latest changes because you can identify the correct version at a glance.
- Eliminates the need to spend time opening and comparing files to determine which one is correct.
- Retains previous versions so no information is ever lost.
- Allows you to edit previous versions and save them as minor versions, or promote them to be the current version.



FileName	VersionID	Minor	Version Status	Version Notes
_Procedure Master.docx	1	0	Released	Controlled Template
_Procedure Master.docx	2	0	Released	Updated Section A
_Procedure Master.docx	3	0	Released	Added Compliance Code
_Procedure Master.docx	4	0	Released	Removed Footer Data
_Procedure Master.docx	4	1	Released	Updated Section 1-3
_Procedure Master.docx	5	0	Released	Approved Revision

File names remain the same but major and minor version numbers apply to each update.

Version notes help you recognize the differences between file versions.

The Version History window provides a complete history of a document's life cycle.

Benefits

- **Automated versioning**
Versions documents automatically each time changed documents are checked in to the repository. Maintains a consistent versioning standard.
- **Improved collaboration**
Team members know who edited document versions and when, and version notes quickly explain changes and provide a means for finding documents later.
- **Automatic audit trail**
Preserves a file's version history, including major and minor versions, creation date and time, access dates, approval status, and more.

Solutions

- **Project management**
Avoid cost overruns by ensuring customers and vendors get the right business documents, blueprints, and project specifications.
- **Security and business continuity**
Protect important business information from accidental deletion.
- **Compliance**
Control important business processes to ensure company-wide consistency and adherence to regulations.

(800) 298-1172
www.DocumentLocator.com

Versioning improves team collaboration, project management, and information administration.

Project managers know how important it is to keep track of drafts and to prevent team members from overwriting each other’s edits, especially if they are working on a group of documents at the same time. Automatic versioning leaves each team member’s edits intact so that no original material is ever lost, and ensures members always know which document contains the most recent changes.

Flexible version options enable administrators to determine how much control users have over the versioning process. Administrators can choose to:

- Allow users to check in documents without incrementing the version number if necessary. For example, if you check in a document and then realize you forgot to make a small change that doesn’t need to be documented separately, you can check out the file, make the change and then check the document back in under the same version number.
- Require users to enter version notes when checking in documents. Version notes explain what changes were made to a document and they help reduce the need to open and compare document versions. If a comparison is needed, however, you can easily access Document Locator’s comparison tool from the Version History Window.
- Prevent unauthorized users from accessing a document’s version history.
- Control which information is available to view in the Version History window.

Managed Documents - Purchase Requisition.xlsx - Version History					
File Edit View Help					
X [Icons]					
FileName	VersionID	Minor /	Version Notes	LastUpdatedBy	LastUpdated
Purchase Requisition.xlsx	1	0	Controlled Template	cssadmin	12/15/2010
Purchase Requisition.xlsx	2	0	Added Vendor Header	cssadmin	12/23/2010
Purchase Requisition.xlsx	3	0	Inserted Field Data	cssadmin	12/23/2010
Purchase Requisition.xlsx	4	0	Changed Formulas	cssadmin	12/23/2010
Purchase Requisition.xlsx	5	0	Updated Sum Totals	cssadmin	04/03/2014
Purchase Requisition.xlsx	6	0	Added New Date Field	cssadmin	09/08/2014
Purchase Requisition.xlsx	7	0	Improved Formatting	cssadmin	04/02/2015
Purchase Requisition.xlsx	8	0	Corrected Look-Up	cssadmin	09/03/2015
Purchase Requisition.xlsx	9	0	Reviewed for Release	cssadmin	03/02/2016

Team member's
version notes.

Team member
who did the work.

Date the team
member did the work.

Version history tracks changes over the document life cycle.

The Version History window displays a document’s version history, which includes version notes, the dates changes were made, the names of the users who worked on or accessed the document versions, assigned Profiles, and more. The version notes entered at document check-in create a record of changes made to the document over time. These notes not only provide an audit trail, they can also be used to find the document later.

Related Features

- **Automated Workflow**
Automate your business processes and create a workflow history.*
- **Check-out and Check-in**
Check out previous versions of documents.
- **Document Approval**
Automate your document approval process.
- **Document Profiles**
Create additional version-level metadata to track and profile document versions.
- **Folder Properties**
Use folder properties to organize and control documents imported to them.
- **Notification Subscriptions**
Receive a notification when subscribed-to events occur.
- **PDF Creator**
Create secure PDF documents to share with others.
- **Records Management**
Ensure compliance with government and industry regulations.
- **Searching**
Find documents by searching on their version notes.
- **Security and Auditing**
Protect your documents from unauthorized access and create additional audit records.
- **Web Access**
Enable remote users to access document version history.*

*Optional module required.

(800) 298-1172
www.DocumentLocator.com

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