Centralized Document Management

Powering information access and control across the company.

DL™
Document Locator
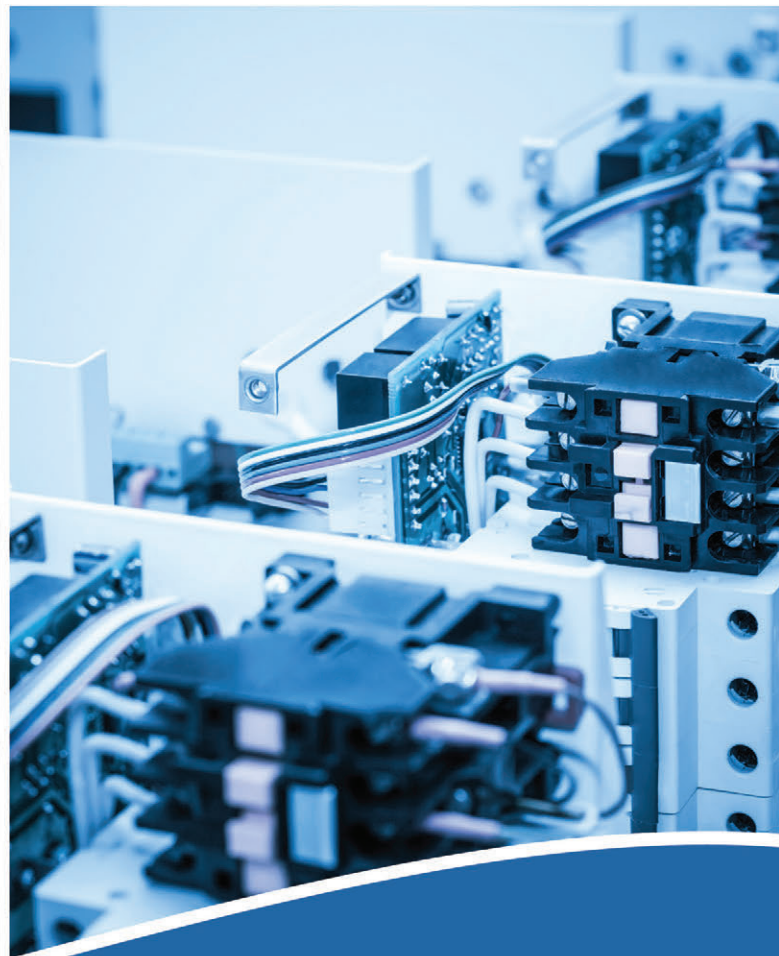
Enterprise Solutions

ColumbiaSoft™

Document Management Software
for Microsoft Windows

A structured system that is easy to use

Share and control documents company-wide so everyone has access to the most up-to-date versions, and information is always secure.

Document Locator is a **centralized document management system** that benefits every department with faster decision-making and process automation. Your company achieves a competitive edge, and the risk of information loss is eliminated.

A unique integration into Microsoft Windows makes centralized document management easy and intuitive. All the components of a structured system are found right within the familiar Windows experience. It's so easy, people already know how to use it.

- Familiar tree-and-folder and right-click Windows navigation.
- Reliable Microsoft SQL Server platform.
- Accessibility across departments that breaks down information silos.
- Integrates with other systems using SDK-API, ODBC dynamic properties, and Fusion searching.

> "
> Like adding additional functionality on top of the familiar file server."
>
> *Greg Gould, CTO*
> *Burns & McDonnell*
> *Engineering*

Windows-integrated document control
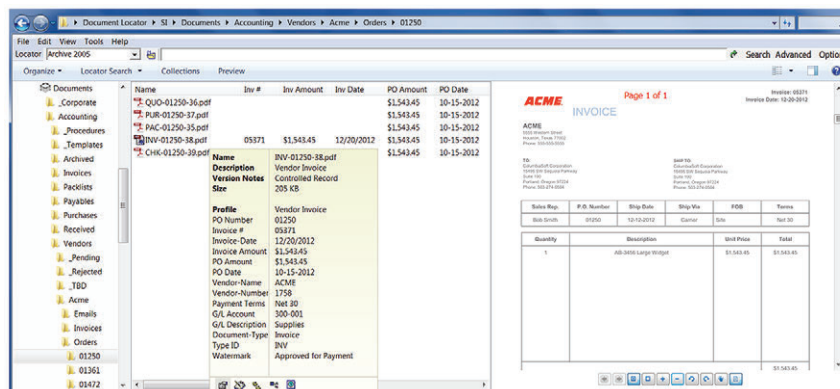
Windows-integration allows users to remain in a familiar work environment.

Centralized document management is built right inside Microsoft Windows using Document Locator by ColumbiaSoft.

The hassles of shared folders eliminated

Document Locator adds functionality and control while keeping people in their familiar work environment. The chaos and frustration of shared networks is replaced with a structured environment where every version is saved and nothing is left to chance.

Automated version control
Manual, ad-hoc versioning that relies on individuals to apply file-naming schemes is fraught with errors. People don't always know if they have the most current version of a document. Document Locator's check-in and check-out supports automated versioning and collaboration. It ensures that changes are not overwritten or deleted as documents are checked back in. As each version is saved, users can add version notes to describe the changes they've made. A version history dialog tracks revision levels, version notes, who made the changes and when the changes were made.

Instant search and retrieval
People spend as much as two hours per day searching for information they need to do their jobs. Intelligent indexing technology with full-text and metadata searching, including scanned paper documents, speeds information retrieval and makes everyone more productive.

Workflow automation
Routing files on paper or by email can lead to errors and delays. Manual processes are difficult to manage and there is little accountability or control. Electronic workflow automates business procedures in a centralized way. Consistent processing, shorter cycle times, and more repeatable business processes are achieved.

Metadata attributes
Descriptive facts that are tagged with each file (known as metadata attributes) make it easier to categorize, cross-reference, and find information. Flexible configuration of metadata Properties in Document Locator means everything is fully customizable to match virtually any business requirement. Properties can also be assembled into Profiles or groups for easy classification.

Collaboration and faster decision-making
Unstructured methods of sharing and saving information, like shared folders, email, and FTP, put collaborative efforts at risk. Time is wasted and files are easily duplicated or lost. Versioning, notifications, workflow, security and the many other capabilities of a centralized system provide the framework for organized collaboration and faster decision-making.

Self-service access
Nobody aspires to be another person's document retriever. Filing and retrieving documents, especially when it involves shipping or re-filing, is unproductive. A centralized system that also offers secure, self-hosted Web access means people can always retrieve files. Employees, vendors, clients… everyone has access to information anytime, anywhere.

Solutions for every department's needs

Centralized document management is tailored to the individual needs of each department. Flexible configuration of components like version control, folder structure automation, workflow, and security align the centralized system to each department's objectives and processes.

Engineering and Operations

Process owners have end-to-end responsibility and control for their documents. Process owners design the process and process teams carry it out, overseeing their own work and making all day-to-day decisions required to keep things moving smoothly.
- Engineering design and specification records
- Manufacturing records control

Quality

Manage the complete lifecycle of documents, including template management, document change request, creation/edit, review, approval, training, distribution, archive and obsolescence.
- SOPs
- Work instructions
- Polices and procedures

Finance and Accounting

Improve the speed and accuracy of accounts payable procedures in a closed-loop system that reduces costs, enforces consistency, and shortens processing time.
- Accounts Payable
- Contract review process
- Purchase requisition process

Environmental and Safety

Records policies and reporting improves environmental compliance and safety.
- Material Safety Data Sheets (MSDS)
- Environmental compliance

Maintenance

Maintenance records are secure and always accessible when needed, anytime, anywhere.
- Equipment records
- Maintenance procedures
- Maintenance logs

Sales and Marketing

Client files and customer reviews are organized and properly recorded.
- Contract review process
- Client management files
- Customer communications

Human Resources

Employee files, certifications, training records… workforce records of all types are digitally secure and supported with automated procedures.
- Employee files
- Certifications
- Training
- Hiring / onboarding
- Employee reviews
- Backfile scanning

Administrative

Global reporting improves visibility and increases the opportunity for improvement.
- Communications
- Global records retention

A platform for document control

Version Control
Determine the latest version at a glance, view and promote prior versions, and capture an audit trail of changes.

Searching
Instantly search and retrieve files, use custom searches, and save searches to find documents again later.

Metadata
Categorize files with descriptive metadata facts to improve organization and findability.

Folder Automation
Automate folder structures for consistency and easy repeatability.

Workflow Automation
Improve business processes with automated routing and electronic approvals.

Document Scanning
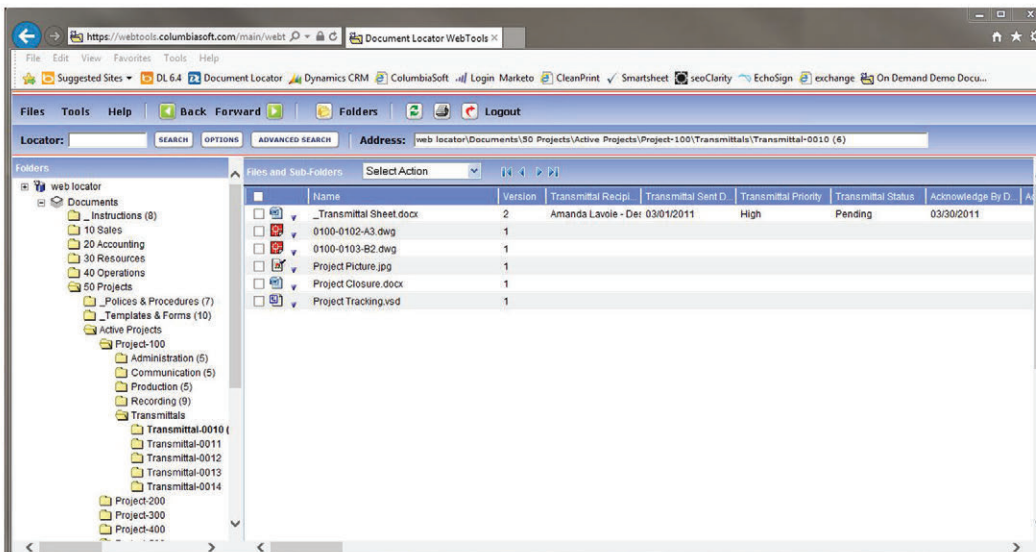Incorporate paper files and make them fully-text searchable.

Outlook Integration
Capture email records to manage and share email communications.

Anytime, anywhere access

An optional, self-hosted web component makes information available beyond the office walls. Employees, vendors, customers… anyone who is authorized can search and retrieve information.

Integration connects information

Centralized document control is further advanced with connections to applications used in different areas of the company. A single, unified platform for document retrieval means that everyone can effectively share and access files without access to specialized departmental software.

Integration options:

- SDK-API Integration
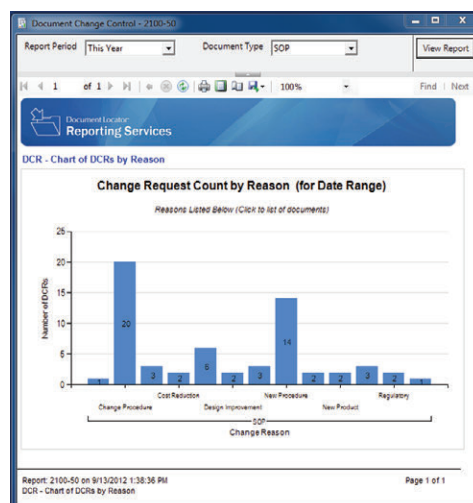- ODBC Dynamic Properties
- DL Fusion Universal Searching
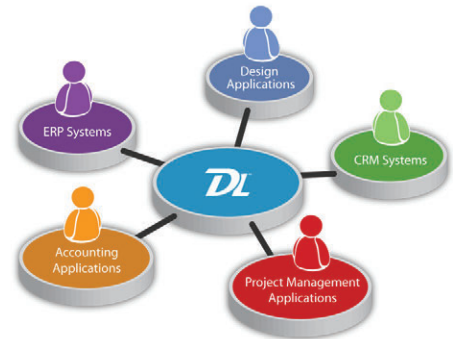
Microsoft Partner
Gold Application Development

Adobe Solutions Network
Commercial Developer

Autodesk Authorized Developer
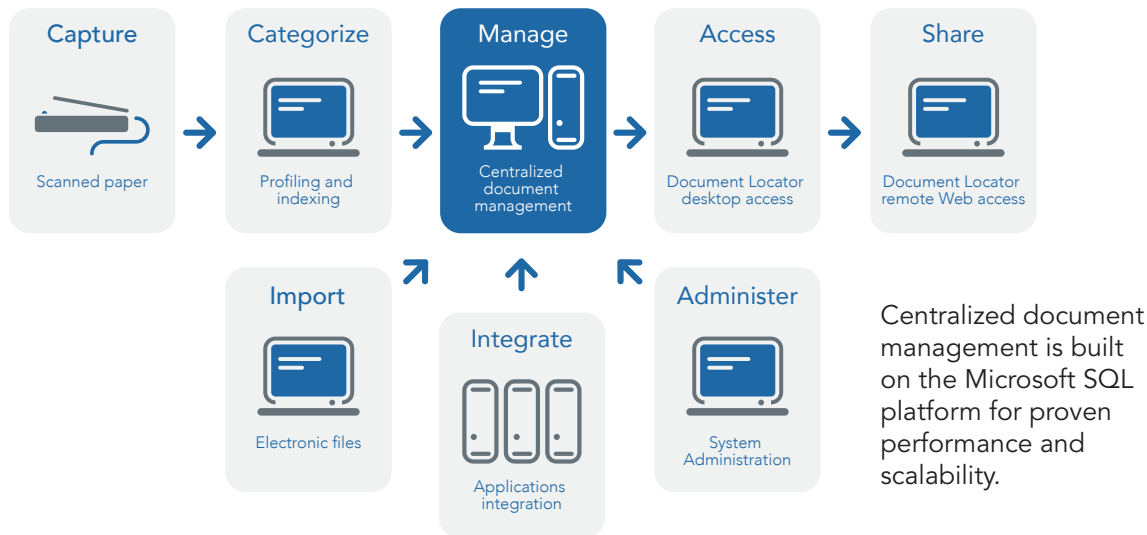
IGC Informative Graphics Corporation

Insightful business intelligence for smart decision-making

Reporting is critical for managers to make timely decisions. A comprehensive set of reports for monitoring system configuration, usage, throughput, and trend analysis are included. Reports are numbered, categorized and named for easy access. Plus, you can add your own custom reports. Over 25 standard reports cover configuration, security, usage metrics, workflow status, and more. Custom reports, including data, charts, and graphs, are configured using standard SQL Server Reporting Services technology.

Leveraging Microsoft SQL technology

Proven performance and affordability of Microsoft SQL Server provides a stable, reliable foundation for centralized document management. With millions of installed sites worldwide and first-place achievements in multiple comparison studies, Microsoft SQL Server has a well-earned reputation as a proven enterprise database solution for all application needs.

Capture	Categorize	Manage	Access	Share
Scanned paper	Profiling and indexing	Centralized document management	Document Locator desktop access	Document Locator remote Web access

Import	Integrate	Administer
Electronic files	Applications integration	System Administration

Centralized document management is built on the Microsoft SQL platform for proven performance and scalability.

Robust security builds confidence

Configurable security settings allow you to control access to sensitive information and make sure people can only access files which they are authorized. Based on the familiar Microsoft NT security model, role-based security allows you to manage privileges based on a user or group basis. Active Directory synchronization harmonizes both network security users and groups. Privileges can be set at the folder and document levels, and permissions can include configurable application-level functionality and back-end database security. A document log captures a complete history and identifies who made changes and when they were made.

Deploy faster than you thought possible

Unlike legacy DMS systems, which can take teams of consultants several months or even years to deploy, our innovative technology is able to be brought online quite quickly. Often, the system is operational in just a few weeks or less - sometimes even days. Our Professional Services experts are available to assist with deployments, and can perform the entire roll-out or only help in areas where needed.