

“Solutions” Image Services

Document Locator Help and Resources

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Introduction

This guide describes various resources available for help using Document Locator and where to find assistance.

Quick Guides

Solutions, Inc. has developed several quick guides that are intended to be exactly that—short, quick-to-the-point guides for various processes and topics within Document Locator. Topics include but are not limited to:

- Add Pages to a Document via Black Ice
- Adding Stamps and Notes to a Document in Black Ice
- Basic Scan Console
- Searching in Document Locator
- Searching in Webtools
- Quick Tips

The list of guides is being expanded and updated often. The quick guides can be accessed at

<http://downloads.gmdsolutions.com/downloads/DLHelp/>

Our Imaging Specialists will be developing ‘How To’ videos soon to also assist in using Document Locator.

F1 Within Document Locator

Press F1 on the keyboard to access the Full Featured Help. If press within a field, the help will go to the specific help for that field or function.

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Document Locator Help

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Document Locator

Get started

Use the links to tasks below to get started. Some of the tasks listed may require sec administrator set up your Document Locator user account.

The following list is organized loosely according to how you might initially begin using

To get started using Document Locator:

1. [Connect to a repository.](#)
2. [Create folders](#) in the repository for organizing and storing documents.

TIP You do not have to set up all of the folders now; you can add folders a

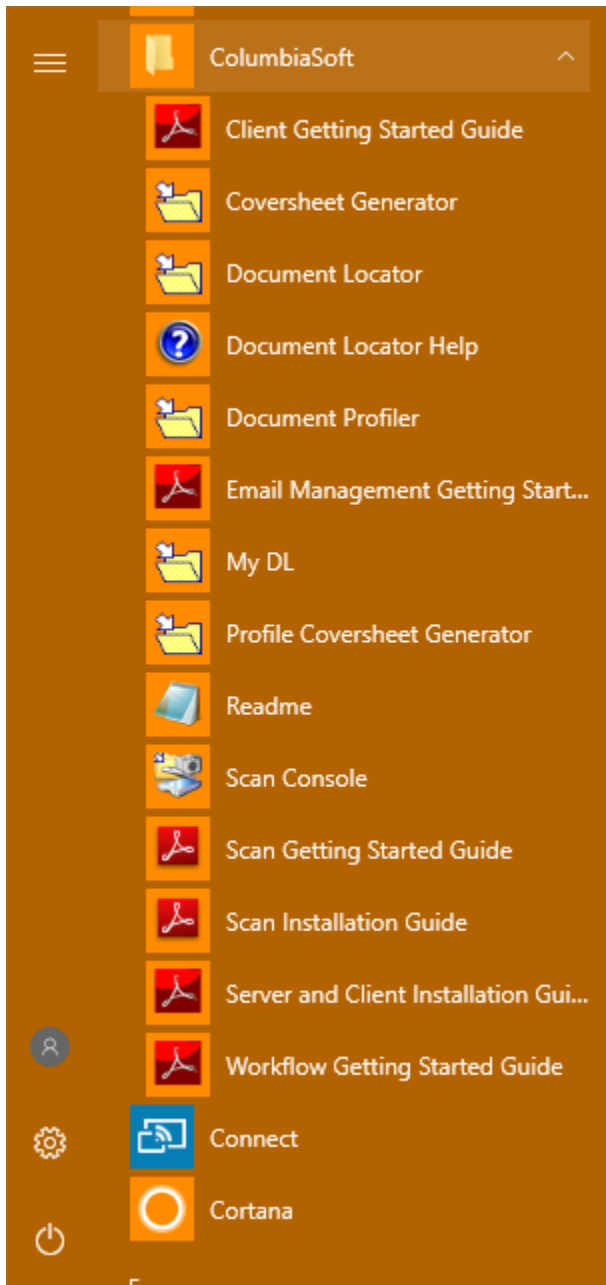
3. To create metadata tags (Profile Properties) for [profiling documents](#) as they ar
 - Learn [about Profiles](#) and [Profile Properties](#)
 - [Create Profile Properties](#) (metadata) with which to build Profiles (groups of
 - [Create a Profile](#) and then assign it to a document as you import the docun
4. To add documents to the repository, do any of the following:
 - Assign a Profile to a document as you [import the document](#)
 - [Create a document](#) from within Document Locator using a document temp
5. Once the documents are in the repository:
 - you can [change the Profile assigned](#) to the documents
 - [Check out a document](#)
 - [Check in a document](#)
 - [Get a copy of the latest version](#) of the document
 - [Search for documents](#)
 - [Create a PDF version](#) of a document

ColumbiaSoft

Complete Guides

More complete help guides are available on any PC that has the Document Locator desktop client loaded. To access them, go to Start, All Programs on the PC and then Columbia Soft. Depending on the applications loaded, there is a Client Getting Started Guide, Scan Getting Started Guide, installation guides, Email Management, and Workflows.

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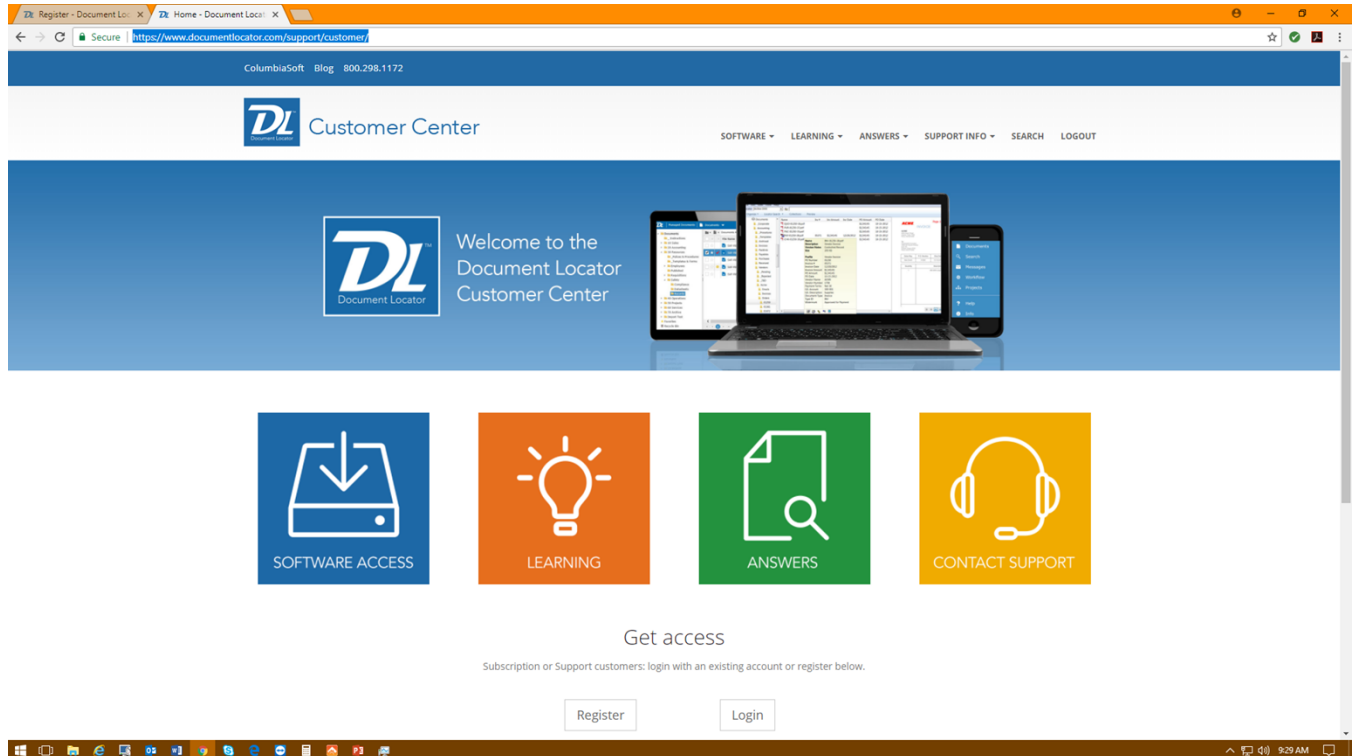
Again, the items available depend on the programs loaded on the PC.

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Online Customer Support Center

ColumbiaSoft, the developer of Document Locator, has an online customer support center that has resources for learning, support, and all things related to your document management system. You will need to register for a user account to access this site. Register with the following link:

<https://www.documentlocator.com/support/customer/register/>



Contact Solutions

If you have any questions, concerns, or suggestions contact Solutions, Inc. Send an email to dl@gmdsolutions.com The message will go to the entire Document Locator team. If you prefer to call, telephone (712) 262-4520.