



August 27, 2018

To whom it may concern:

I am a satisfied client of ColumbiaSoft (Document Locator and PerfectForm software) and will definitely recommend their services to any organization that wants to efficiently transition from a paper file to a paperless environment. Their support teams are very flexible in customizing the schema for your specific needs and can adapt to modifications throughout the entire implementation.

We decided to start by scanning paper documents to get the current employment files into the database for over 2,000 active employees. The process works flawlessly to "meta-tag" every item with optical recognition capability in order to search for keywords. We work in a Windows environment and the file structure is seamless in appearance and functionality within Document Locator and is easy to maneuver for the end users. Security and viewing rights work the way they are intended based on the access rights determined by the Administrator/SuperUser.

Hardware is determined by your budgetary constraints in regard to speed of scanning (double-sided scanning is a MUST). Any scanning device will work by generating PDF's however we invested in tabletop scanners for the authorized end users to scan directly into the Employee Files. We also have multipurpose devices throughout our offsite locations as well as our corporate location that scan documents into a centralized repository for our Document Specialist to review then post into the respective employee files. In addition to PDF's, we can tag emails, video files, excel/word/powerpoint and all other media into the searchable files for the Employee Files.

Now that the scanning process is under way, we are starting to enter a completely paperless environment by creating PerfectForms templates which allow a workflow (with time-stamping) for employees to read/acknowledge documentation and approve electronically through various means (tablets, signature capture devices on workstations and kiosks). Time Off Request forms, Warnings, Onboarding documentation and Review are a few of the starting templates we are working on. Management can electronically sign/edit and push electronic documents onto the next management level for further authorization and ultimately onto the HR department to post updates to compensation/benefits/store departments and locations. Audit reports allow management to know who accessed which record and where a document authorization was "bottle-necked". Alerts are available in various forms (email/text/system notices) depending on how comfortable your team are on receiving the multitude of warning notices.

Once again, I highly recommend ColumbiaSoft's professional team and their approach to ensure a smooth implementation.

Sincerely,

A handwritten signature in blue ink, appearing to read "J. Lodenquai".

James Lodenquai  
Human Resources Director