

Alchemy 8.0 Guide to New Features

Introduction

This document is intended to provide a detailed overview of the new features introduced in Captaris Alchemy 8.0. To arrange for a product demonstration, please contact your Captaris reseller or representative.

Covered in this Document:

- The Fixed Content Management Suite concept
- Document Management
- Records Management
- Image Capture and Processing
- Document Viewing
- Repository Management

The Fixed Content Management Suite Concept

Alchemy 8.0 was developed to provide the industry's first Fixed Content Management suite. Fixed Content Management is a new term that embraces 'enterprise content' in its final (fixed) form. According to Doculabs, the leading Enterprise Content Management industry analyst, most of enterprise content exists as fixed content such as images, email, PDFs and enterprise reports. The Alchemy 8.0 product suite handles multiple types of fixed content, and manages the content through the Information Lifecycle Management (ILM) stages—including capture, workflow, document management, archive, records management, retrieval and distribution. Ideal for mid-market companies, the solution provides a far lower cost of ownership than enterprise content management solutions.

A key concept in Alchemy 8.0 is to provide organizations with one software solution and one repository for all their fixed content needs.

DISCLAIMER: Details within this document are subject to change at any time prior to the product's release. Captaris will make reasonable attempts to inform partners and customers of these changes. Please contact the Captaris product manager for the latest information or to verify the status of a feature.

Document Management

Document Management is the core set of functionality that allows a business to manage their active business data in an efficient, secure and timely manner. With document management, businesses become more efficient by lowering information storage costs, speeding user access to information and reduce replicating work effort.

Alchemy 8.0 introduces new document management functionality that allows a business to manage their information easier, more securely and with lower costs. This functionality is available by purchasing the Alchemy 8.0 Advanced Server configuration.

FEATURE	DESCRIPTION
<p>Library Services - Document Versioning</p>	<p>The file system is littered with all sorts of documents and other information. But how do users know what is what, and if there is a newer version of a document? The file name can certainly be a clue but is not always and often depends on a specific user's own tastes.</p> <p>Alchemy 8.0 adds the ability to manage several versions of a single document, updating the version as new data is added. Each version is self-contained with its own metadata and version comments so a complete history trail is available.</p> <p>Additionally version viewing can be controlled so some users can see all versions while others will only see what is the "published" or "official" version.</p> <p>Versions can be applied to any document type and will be created if a document's contents (including annotations) are changed – very important in order to manage scenarios when several variations of documents exist.</p> <p>Versions can replace originals (given the correct authorization) and can even become new documents. When adding documents back, the system always makes sure the new version is correctly placed.</p> <p>Versions can be created in clients with write-access to repositories, such as Alchemy Administrator (formerly called Alchemy Build), Alchemy Indexing Station and Alchemy Document Management clients.</p>
<p>Library Services - Replacing Documents</p>	<p>Often businesses keep only a single document version in order to maintain one record.</p> <p>Alchemy 8.0 allows authorized users to replace documents if need be to support a variety of business needs. Seemingly "dead" documents such as images have new life enabling users, for instance, to add new pages or annotations to existing TIF or Image PDFs and then replace the original, creating a new document with new information.</p>
<p>Library Services - Check-in/Out Control</p>	<p>An important supporting capability is managing user access to a document that is being altered – to insure that users still have access to documents but cannot make changes until the document is out of edit mode.</p> <p>Additionally, users accessing business documents should be able to use them, in both online and offline mode, in order to make changes, updates, etc.</p> <p>Alchemy 8.0 includes the ability to "reserve" a document for purposes of changing its contents (including annotations). This is important to insure that alterations to a document happen in a controlled manner with no chance of lost data.</p> <p>Checking-in and out documents allows all of this multi-user activity to take place. Additionally, mobile users can reserve documents, edit them away from the office, and add them back to the system, while still allowing others access to the "system version".</p> <p>This feature is available in clients with write-access to repositories, such as Alchemy Administrator (formerly called Alchemy Build), Alchemy Indexing Station and Alchemy Document Management clients. Alchemy Web and Alchemy Search have the ability to see the status of documents, but cannot check-out/in documents.</p>

FEATURE	DESCRIPTION
<p>Document Management Administration</p>	<p>Just as important as versioning and check-in/out controls is the ability to manage all the various users on the system. What if a person checks-out a document and then goes home or worse, on vacation?</p> <p>With Alchemy 8.0, administrators or delegates have the ability to easily search documents based on check-out status and see who has control of the document and why. If granted the capability, users can even force the document to be checked back in.</p> <p>The administrator of the system can also determine which Alchemy repositories have library services applied to them, who can see all versions versus viewing only the "published" version, and grant or deny ability to check-out documents by user or role.</p> <p>All actions taken, whether check-outs or check-ins, adding versions, replacing documents, etc. are all tracked in the system audit log.</p>
<p>Microsoft Office Integration client</p>	<p>Information workers live day-in and day-out within their own productivity applications such as Microsoft Word, Excel, or Outlook. In fact, the proliferation of these applications has significantly contributed to the overwhelming amount of business information that originates and lives as electronic documents.</p> <p>Managing these documents is an increasingly important business need especially in a world of regulations and legal risk. A successful document solution should allow users to continue to use their applications while incorporating document management functionality with minimal intrusion or impact to their daily routines.</p> <p>Alchemy 8.0 introduces a new Alchemy Document Management client (sold as a separate license) that provides document search, repository browsing and library services functionality all from within the following Microsoft Office applications: Word, Excel, PowerPoint and Outlook. Users will access this functionality from simple-to-use pull-down menus and dialog boxes all integrated into each application.</p>

Records Management

Records Management is the art and science of 1) determining what government or business information is necessary to keep, 2) categorizing the business information, 3) understanding what rules and regulations exist that mandate specific retention periods for that information, and 4) implementing and maintaining an effective program to manage all the various information—some for long periods of time.

In an era of ever-growing scrutiny of business practices, an effective records management program is a must and technology plays an important role in the success of any such program. Alchemy 8.0 successfully integrates the disciplines and processes of records management with IT's management of repositories and digital storage, and with the business end-users who rely on access to documents, into **one fully-integrated software solution**.

Alchemy 8.0 includes the option for a records manager to apply a simple-to-use yet feature-rich and comprehensive records management system to an Alchemy Advanced Server managing Alchemy repositories, as well as physical file boxes and electronic files on the Windows file system. This functionality is available by purchasing the Alchemy Records Manager (RM) license and the Alchemy 8.0 Advanced Server configuration.

FEATURE	DESCRIPTION
<p>DoD 5015.2 Compliant</p>	<p>The Department of Defense (DoD) realized that it needed to create a series of standards for how DoD records are managed. Part of that standard includes requirements for any software-portion of any DoD records program called DoD 5015.2 DESIGN CRITERIA STANDARD FOR ELECTRONIC RECORDS MANAGEMENT SOFTWARE APPLICATIONS.</p> <p>The standard is so comprehensive it has become a model for not only other businesses wishing to evaluate records management software solutions, but also for other countries wishing to establish their own standard.</p> <p>Designed as a DoD 5015.2 compliant product, Alchemy RM 8.0 is scheduled to undergo official certification by the Department of Defense in Q1 of 2005.</p>
<p>Creating File Plans</p>	<p>File plans are hierarchies of document types called "series". Each series has its own metadata and retention requirements.</p> <p>Custom File Plans – Alchemy RM will allow records managers to create their own custom file plans to meet their own needs. This includes creating all necessary supporting components, record folders and groups, and assigning various retention schedules.</p> <p>DoD Compliant File Plans – For users that fall under the DoD 5015 requirements, a simple pre-defined file plan structure is available, defaulting file plans to the required DoD structure (Categories, Record Folders, etc.) and providing all required metadata fields.</p>
<p>Retention Instructions</p>	<p>Retention Instructions are the rules that govern how long a certain record is kept and what the records manager needs to do once that period is over. Enabling easy creation and tracking of the literally thousands of retention tasks is a key success factor for a good program.</p> <p>With Alchemy RM, records administrators can create rules that govern what types of events trigger retention periods, how long the periods last and what to do at the retention period conclusion.</p> <p>Administrators can even combine rules to create sophisticated multi-phase retention instructions.</p>
<p>Declaring Records</p>	<p>Declaring records is the process of capturing the document in the system and supplying any necessary metadata to describe the record. The user will typically pick a category in which to file the document, any related document template and then enter any additional metadata if required.</p> <p>Providing an easy-to-use mechanism for capturing and declaring records is an important aspect of any records management program. Alchemy RM offers the ability to declare records from any "write capable" client including Alchemy Index, Alchemy Administrator and Alchemy Document Management clients.</p>
<p>Record Templates</p>	<p>All documents are rarely alike. Most businesses have several different classes of documents, each with their own data types and descriptions. Examples would be contracts, invoices, and financial statements, among potentially hundreds of others.</p> <p>To properly manage these documents when declared as records, it is very useful to be able to apply a document type with each filed record—these types can even have their own metadata requirements.</p> <p>Alchemy RM provides a wide amount of flexibility around describing records. Administrators can create any number of record templates, each with their own metadata entry requirements.</p> <p>Once created, the administrator can "attach" a particular type of document template to a record category allowing the user filing the record to choose the particular document type that then drives the proper data entry requirements.</p>

FEATURE	DESCRIPTION
<p>Record Linking</p>	<p>Many times a single transaction can involve many different types of documents, each having to be filed as a record. For example, a purchase order will also have a corresponding invoice, or a customer contract will have associated formal negotiation information or letters of credit. While each individual record might be filed into a different record category, the ability to associated records with one another is very important in providing "traceability" of a complete set of documents.</p> <p>Alchemy RM provides the ability to create any number of pre-defined document links that allow a records administrator to associate one record with another. Once linked, authorized users can search for a record and its associated linked records, supplying easy and quick access to the comprehensive record set.</p>
<p>Storage-independent System</p>	<p>Most documents declared as records are preserved to meet regulatory requirements or to reduce business risk (as in the case of legal discovery requirements). While important to retain, there is often no need to provide immediate access to records over 1 year old simply due to lack of need by ongoing business operations.</p> <p>The Alchemy 8.0 system that Alchemy RM is built on offers the widest range of storage options for records that need to be accessed immediately all the way to records that aren't accessed at all. Alchemy 8.0 can manage archives on hard disk, optical jukebox, individual CD or DVD, Network Attached Storage, and more. (Optional third-party storage management software is required in some cases.) Additionally, a single archive can span across different storage media to provide unparalleled storage flexibility.</p>
<p>Records Portability for Discovery or Audits</p>	<p>While most businesses do not like to think about things such as lawsuits or audits, they do happen. Preventative measures to reduce costs of legal discovery and the like are one major reason records management programs have become widely adopted.</p> <p>Even with a first-rate program in place, most records managers find it difficult to provide unfettered access to specific records without jumping through hoops, getting IT involved, and becoming entangled in a mess of red tape. How do you provide access to only a subset of records? Even worse, what if the auditor wants to take the records for further review?</p> <p>Alchemy RM provides the industry's best records portability allowing records managers to search for specific records, group them into a stand-alone archive, and then easily copy the archive to CD or DVD along with a self-contained search and view application. Security can even be established for the portable archive, applying passwords at the archive, folder, or even record level.</p>

Image Capture and Processing

Converting the enormous amount of information stored on paper media is the cornerstone of any document management program. Only after converting to an electronic form is most of the information available to other applications, and to end-users regardless of location.

Alchemy 8.0 includes many enhancements to the way users capture this paper-based information in order to streamline and simplify the process—without sacrificing usefulness. This functionality is available to existing Scan users with a current support contract who upgrade to Alchemy Scan 8.0, as well as to new customers who purchase Alchemy Scan 8.0.

FEATURE	DESCRIPTION
New Scan Interface	The new Alchemy Scan 8.0 module has a completely re-designed user interface designed to maximize scan productivity by providing a simple-to-use, yet powerful and comprehensive set of controls.
Scanner Profiles	Users can now create multiple scanner profiles to support a wide variety of capture needs. Whether it's a dozen scanners each with their own settings or a single scanner with a dozen settings for specific forms capture needs, Alchemy Scan 8.0 does it.
Batch Profiles	Companies have all sorts of paper documents that need to be captured into a system that will allow more robust access, use and control. Alchemy Scan 8.0 allows users to create pre-defined batch profiles which include scanner profiles, OCR templates, routing directions to place documents in a specific repository location and more. All settings are accessible from an intuitive user interface.
Improved Optical Character Recognition (OCR)	Often businesses need access to the data within images in order to satisfy downstream business processing needs. In order to be successful, the data needs to be available quickly and accurately. Alchemy Scan 8.0 includes a sophisticated data extraction capability that uses multiple OCR engines and accuracy voting algorithms to insure that the data is accurate the first time.
Scan-to-PDF	<p>PDF is rapidly becoming the de facto standard for more complex imaging and document management needs. As a result, the ability to immediately convert a paper document to a fully-functional PDF electronic document is essential in meeting business requirements.</p> <p>Alchemy Scan 8.0 includes the ability to capture paper documents as PDF. These PDF documents can either be images only or include OCR text plus the image to create fully searchable documents.</p> <p>These Image+Text PDF documents allow several different views such as text only, image only, or both so that searches and highlights can be made right on the image document itself.</p>

Document Viewing

Rich document access and viewing functionality is an important element of any successful document management program. Alchemy 8.0 includes a number of significant advances and improvements around document access, specifically around Adobe's Portable Document Format, further strengthening the Alchemy position as a solution to handle fixed content. This functionality is available to any customer with Alchemy Build, Indexing Station, or Search who upgrades to Alchemy 8.0 versions of those applications.

FEATURE	DESCRIPTION
Integrated PDF, Text, and COLD Document Viewer	<p>Alchemy 8.0 features a new, multi-document viewer, providing a rich user experience for interacting with PDF, text and corporate reports using the Alchemy forms overlay feature.</p> <p>Developed internally by CAPTARIS, the viewer has several advantages over the Acrobat Reader for PDFs. They are 1) simplicity vs. complexity, 2) integration with all Alchemy security features, and 3) no reliance on any third-party software. Users can still launch the PDF into Acrobat if needed. However, Acrobat is no longer required to view and search standard PDF files.</p> <p>COLD reports can now be viewed with a Greenbar overlay.</p> <p>Users can email documents from within the viewer using a MAPI-compliant email application. They can customize their viewing experience with over 30 different view options and even view the document in full-screen mode.</p>
MicroStation and Enhanced AutoCAD Support	<p>Alchemy 8.0 supports the popular Bentley Systems MicroStation CAD format, in addition to expanding AutoCAD formats to include 2004 and 2005. Together, these document types represent about 90 percent of the architectural, engineering and construction documents stored electronically.</p>
TIF, COLD and Text Conversion to PDF	<p>While text files are human-readable, supported in a wide variety of applications, and can be structured, they do not provide robust formatting, multi-page capability, or support for images or other multimedia objects.</p> <p>Alchemy 8.0 introduces the ability to download or email converted TIF, text and COLD documents types to the de facto standard for document portability and interoperability—PDF.</p>

Repository Management Improvements for IT

Repository Management includes all functionality that enables a document management system to effectively, securely and reliably perform its duties. While often taking a back seat to end-user functionality, repository management is undoubtedly becoming a more important consideration for IT as businesses add content management to their strategic plans.

Alchemy Server 8.0 includes a number of repository management enhancements that further separate it from other document management solutions in the crucial areas of simplicity and ease-of-use. This functionality is available to existing Alchemy Server users with a current support contract who upgrade to Alchemy Server 8.0, as well as to new customers who purchase configurations including Alchemy Server 8.0.

FEATURE	DESCRIPTION
Repository Publishing	<p>Giving employees quick and simple access to documents in one or more repositories is important for adoption. Yet they cannot be expected to always know where the repositories are located.</p> <p>Alchemy Server 8.0 allows users with Alchemy client programs to access published repositories without having to browse for the physical location of a repository on the file system itself. When a user wishes to view a repository, they only need to select the location of Alchemy Server on the network. The client application automatically requests the latest repository list from Alchemy Server. This means that any repository published under Server control will be immediately available to them, provided the user has the correct credentials.</p>
Hot Backup	<p>Information stored in documents can be as important to business operations as any data stored in transactional systems. For this reason, the ability to simply, quickly and reliably backup the document data is crucial.</p> <p>Alchemy Server 8.0 allows administrators to backup not only the document and metadata information, but also system data such as security settings. What's more, the backups are self-contained files that are easily stored on archive media for quick offline access or portability for offsite storage.</p>
Remote Administration	<p>While every company would like the administrator to always be onsite 24X7, in reality this is just not possible. Alchemy Server 8.0 allows administrators to remotely manage the system to better support 24X7 access to business documents.</p>
Add Multiple Repositories	<p>Alchemy Server 8.0 has the capability to add or remove repositories in groups, rather than one at a time, eliminating the need to perform multiple steps in ongoing maintenance routines.</p>

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