



## DATASHEET

# Alchemy Records Manager

Creates, Captures and Manages Records for Long or Short-term Compliance Needs

### FEATURES AT A GLANCE

- Easily create and manage file plans
- Control retention schedules for multiple record types
- Place temporary holds on records
- Helps with DoD 5015.2 compliance
- Fully integrated with the Alchemy content management suite

### Designed by records managers, for records manager

A team of records management professionals who use Alchemy gave the Captaris product team valuable input and great ideas on how to make electronic records management 'RM-friendly'.

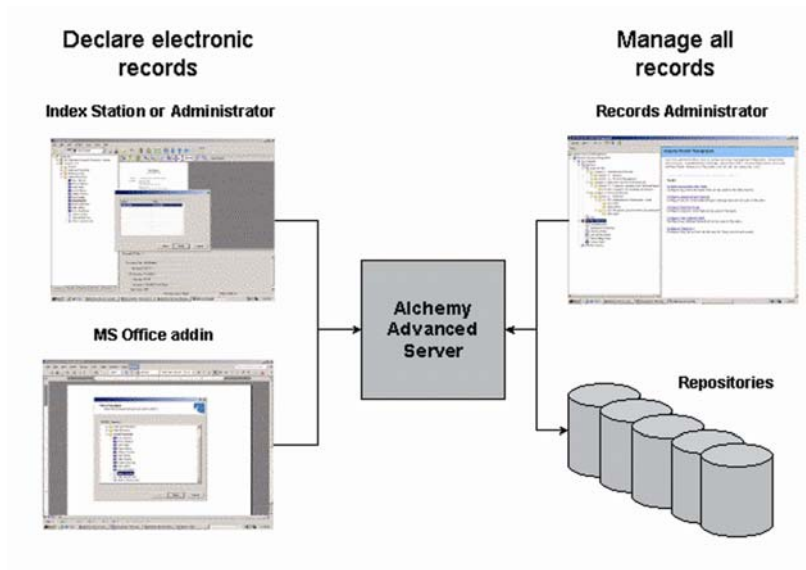
Captaris Alchemy Records Manager (RM) is the records manager application for content and data stored in Alchemy repositories. With it, a records manager can easily create and manage file plans and apply them to any electronic document. Physical files and files stored on the Windows file system can also be managed with RM.

Starting with the basic file planning components such as record series/class folders, filing templates and retention rules, you can create any number of hierarchical levels to accommodate the most simple to the most complex records filing and management needs.

Electronic documents are declared (or "filed") into the record system from Alchemy clients. Any file capture process supported in Alchemy (scanning, drag and drop from Windows, enterprise report capture and Office add-on) is now "record enabled". The end-user simply selects the record class defined in RM, enters the required metadata and declares the record. Once filed in the repository, the content is under the control of RM for the lifecycle.

Records can be linked to other records, searched, re-filed and disposed of according to pre-set rules. All actions taken on records can be controlled by the Alchemy Advanced Server security system (audit logging, Role-based access control). The manager can easily run reports to stay compliant with corporate and government policies. Record folders can also be "frozen", effectively suspending any disposition until a matter is resolved.

## Records Management System Architecture

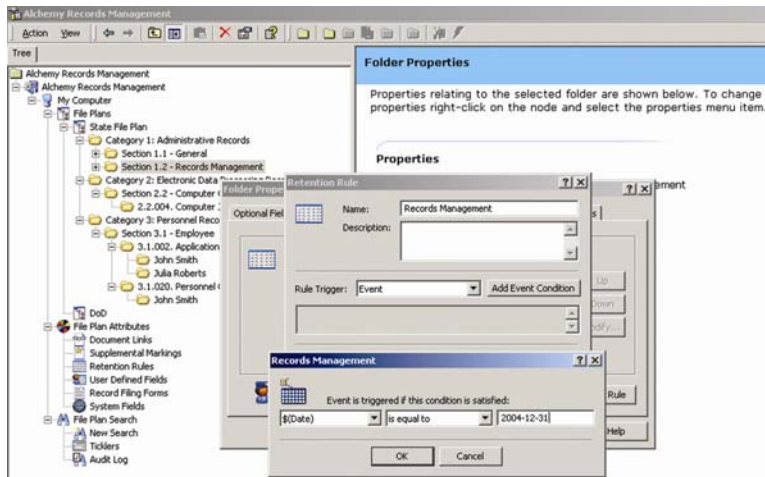


### ALWAYS READY FOR DISCOVERY OR AUDITS

When it comes time for an audit or discovery, the manager can quickly and accurately produce records using Alchemy's powerful search and retrieval tools. The production results can be printed, faxed, emailed or even burned on CD or DVD along with a viewer and search engine.

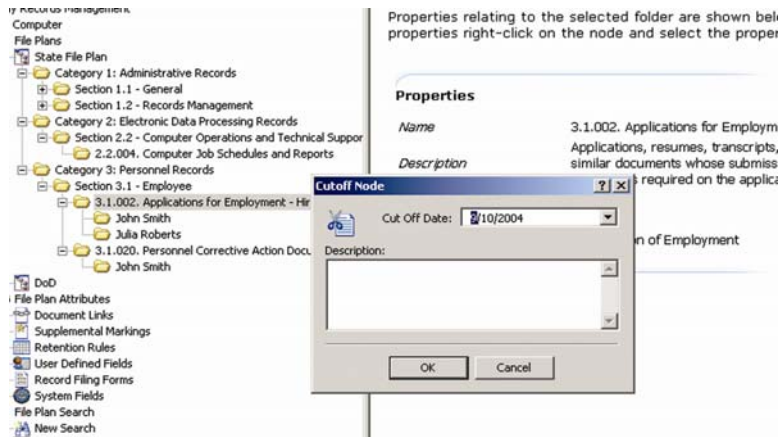
### CREATING RETENTION RULES

This will determine how long the records will be retained and the action to be taken at the end of the retention period.



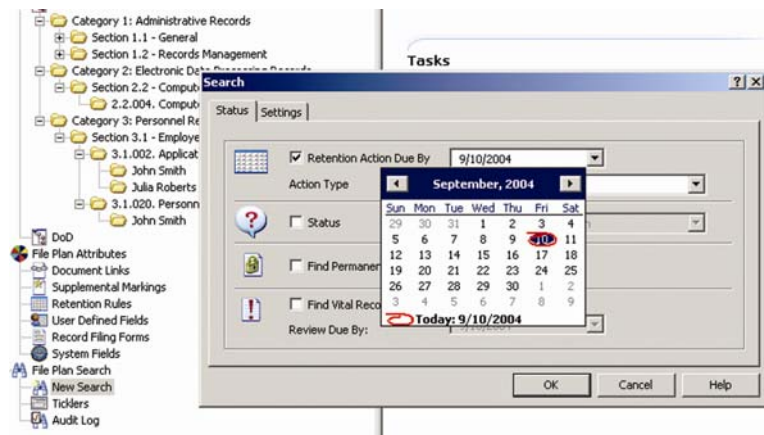
## THE CUTOFF FOLDER

Setting the cutoff date begins the retention period for any document filed within the folder.



## MANAGING THE LIFECYCLE

Managers can use the simple search tools in RM to quickly identify all records requiring a specific action such as disposition or migration, according to the retention rules.



## SYSTEM REQUIREMENTS

### Server

- Alchemy Advanced Server 8.0

### Client

- Windows 2000, XP

## FOR MORE INFORMATION

Captaris Sales Representatives are eager to answer your questions and recommend solutions that can help meet your specific needs. If you are interested in finding more information about Captaris solutions, locate the Product Sales Representative for your region.

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