



OVERVIEW

Alchemy Document Management Solution Brief

MARKET OVERVIEW

Document management represents the evolution of electronic document imaging solutions. In the mid-1980s, vendors emerged that provided the ability to capture paper documents as electronic images that could then be indexed, stored and searched through desktop applications. The immediate benefits were a dramatic reduction in the space required to store physical paper documents and the immediacy in which the documents became available to those that needed the information.

In the early 1990s, many businesses wanted to extend the ability to manage business information to the electronic documents created by emerging desktop applications, such as WordPerfect, Lotus123 and the Microsoft variants. The primary difference was that, unlike images, these documents could have contents that change over time, instead of "fixed" content. A solution was needed to manage many different users accessing this stored information and to ensure that changes made by one user did not conflict with changes made by another user to the same document.

Thus emerged document management solutions that provide what the industry terms "library services." Library services provide the ability to "check-out" a document, reserving it for one user to edit while others can only access the document in a read-only mode. Once the necessary changes are made to the document, the user "checks-in" the document and can either replace the original or create a version of the original. The same library services functions also help with imaging solutions where users want to add annotations to individual images.

As electronic information created by these desktop applications grew exponentially, many vendors that began with imaging moved into document management, including FileNet, Optika and Hyland. Today document management is a billion-dollar industry and is a significant component of Enterprise Content Management (ECM) that includes workflow, content integration, Web content management and imaging.

The primary value of ECM, and document management, is that it can reduce expenses associated with managing business information, increase productivity by providing immediate access to information regardless of location, help support process improvement through Business Process Management suites and increase the ability to comply with various government regulations. Increasingly, document management is viewed as the backbone of any compliance initiative, as most regulations involve long-term management of documents.

Alchemy provides a complete and fully integrated document management solution that allows capture and control of any type of electronic information in an easy-to-use solution that scales from the smallest business to the largest multinational corporation.

PEOPLE INVOLVED

Department managers and IT professionals are typically the people involved with finding and evaluating a prospective solution's ability to meet their specific needs and, then, using it. As the needed solution grows to more of an enterprise initiative, the chief executive-level becomes more involved in setting the agenda with lower-level managers charged to source and implement the solution. Regardless of the parties involved, careful attention to **both** perspectives should be taken into consideration during any engagement in order to successfully build credibility with the prospect.

PAIN POINTS	DESIRED CAPABILITIES	KEY RESULTS	COST OF DELAY
CFO/CEO <ul style="list-style-type: none"> • How do I create an organization that has all the information needed? • How can I increase productivity? 	<ul style="list-style-type: none"> • Quick access to current information • Facilitates compliance 	<ul style="list-style-type: none"> • Increased productivity • Better decisions • Reduced risk 	<ul style="list-style-type: none"> • Lost information and liability • Inability to act and react to situations quickly
Department Managers <ul style="list-style-type: none"> • How do I keep my reports from duplicating work? • How can I ensure employees have the information needed when it's most needed? • How do I enforce processes in a way that are non-invasive? 	<ul style="list-style-type: none"> • Staff has access to any information needed • Minimal negative impact to existing operations • Solution is easy-to-use 	<ul style="list-style-type: none"> • Business and its departments are more efficient • Flexible to use and easy to train end-users 	<ul style="list-style-type: none"> • Costly manual processes • Risk due to inability to find records quickly
IT <ul style="list-style-type: none"> • How do I support the company's information management initiatives? • How do I manage yet another app? 	<ul style="list-style-type: none"> • No major hardware or software changes • Leverages existing systems 	<ul style="list-style-type: none"> • Low resource commitment 	<ul style="list-style-type: none"> • Loss of information due to conflicting meanings of archival and Information Lifecycle Management

QUALIFICATION METHODOLOGY

Prospect: Types of documents? Existing processes or programs? Who is controlling the initiative? Compliance issues? Who uses information? Existing systems? User education?

INDUSTRY TERMS

- **Library Services:** The common document management functions of controlling who has access to a document to make changes (check-in/out) and the ability to create multiple instances of a document (versions).
- **Imaging:** The process of scanning a document or set of documents in order to produce and capture the information in an electronic form. The most common type of images created is TIF. Adobe's PDF format is quickly gaining ground and could eventually replace TIF.
- **COLD/ERM:** (Computer Output to Laser Disk/Enterprise Report Management) Stores and indexes computer output (primarily reports) on magnetic disks, optical discs and magnetic tape. Once stored, the reports can be retrieved, viewed, printed, faxed or distributed to the Internet. Often used for Internet billing applications.
- **Indexing:** Identification of specific attributes of a document or database record to facilitate retrieval.
- **Compound Document:** A document that consists of one or more additional objects. An example is an HTML file that also contains images, text and other components.
- **Forms Processing:** The ability for software to accept scanned forms and extract data from the boxes and lines to populate databases. Software usually includes the ability to drop out the form so that recognition accuracy improves. Intelligent Document Recognition automatically identifies document types from the layout and structure of the document.

ALCHEMY DOCUMENT MANAGEMENT POSITION STATEMENTS

- While most document management solutions involve supporting information that is changing, all data eventually becomes fixed in nature. Alchemy is the best solution to provide not only support for changing documents, but for the great quantity of fixed content to be managed.
- Alchemy is the easiest document management solution on the market. Easiest to install and manage, and easiest to use. Minimal training is required and solutions can be up-and-running in a matter of days or weeks, not months.
- Alchemy is a fully-integrated solution that includes many features in the base product that others offer as options. Fully integrated means everything works well together, and you only need one vendor.
- Alchemy can support the smallest office or the largest enterprise. It scales in tandem with your business and can handle the most complex problem with a simple solution.

KEY NEEDS	ALCHEMY SOLUTION
Ability to control the document creation process	<ul style="list-style-type: none"> • Alchemy provides check-in/out to manage changes to any document in the system. While a document is checked out, others can see who is editing the document and why but still access the document in read-only mode. • Alchemy provides plug-ins to popular Microsoft Office productivity suite allowing users to work with documents in the environment they are accustomed to—all while having access to key document management features of Alchemy.
Ability to identify the authorship and the sequence of different document versions	<ul style="list-style-type: none"> • Alchemy provides for the ability to create and manage multiple versions of a single document and collect them together. • Alchemy tracks and displays information associated with document versions, such as author, date created and version number.
Ability to restrict access to document versions or library services functionality	<ul style="list-style-type: none"> • Alchemy provides two different display options based on user or group: the ability to see all versions or restricting access to only the published version. • Alchemy provides controls that allow the administrator to determine which user or group can check-out and/or create versions of documents.
Ability to audit the system and to manage document status	<ul style="list-style-type: none"> • Alchemy provides an extensive audit logging service that tracks detailed user actions and document information. • A "document management administrator" function allows the administrator, or a delegate, to search document status, by user or date range, and check-in documents.

FUD (FEAR, UNCERTAINTY AND DOUBT) FACTORS

- Lack of integration with other competing Records Management and Document Management solutions increase overall cost and place project success in doubt.
- What third-party software does the competing solution require? Additional requirements often result in hidden costs and complexity.
- Does the Document Management solution in mind have the ability to manage data from cradle to grave? And do it in one integrated solution?

FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture – process – archive – deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit www.captaris.com or call +1.520.320.7000.

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