



## FEATURES AT A GLANCE

- Easily create and manage file plans
- Control retention schedules for multiple record types
- Place temporary holds on records
- Fully integrated with the Alchemy Content Management Suite

## Captaris® Alchemy® Records Manager

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

### Designed by records managers, for records managers

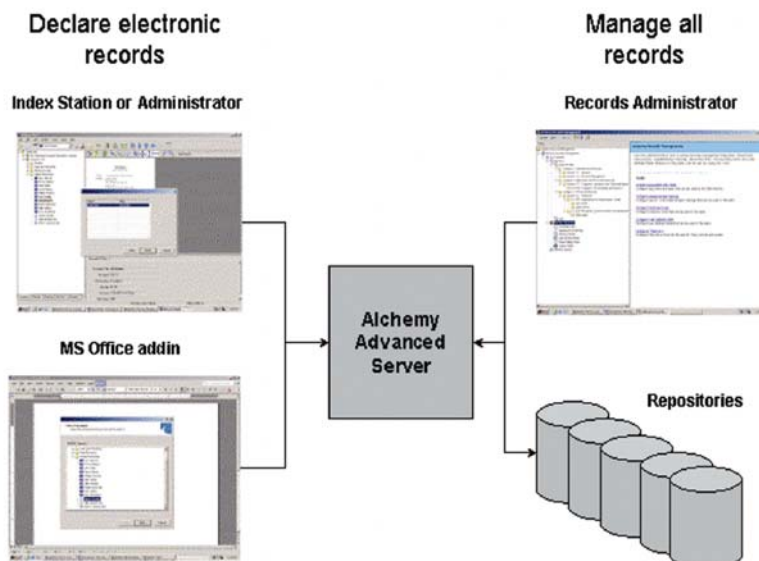
A team of records management professionals who use Alchemy gave the Captaris product team valuable input and great ideas on how to make electronic records management "RM-friendly".

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 such as scanning, drag-and-drop from Windows, enterprise report capture and Microsoft 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

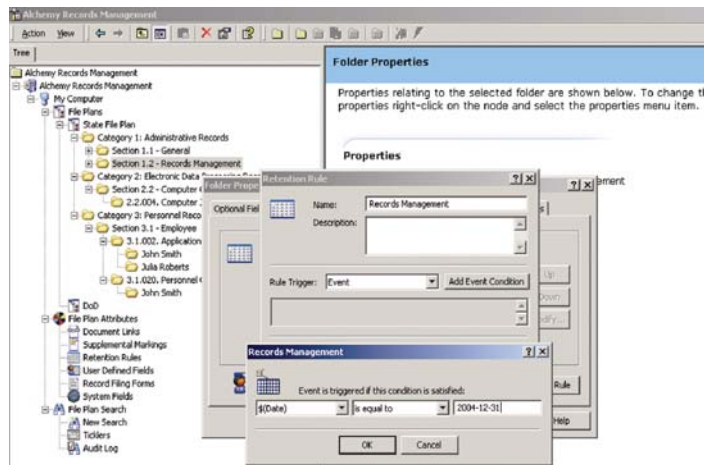
# Captaris Alchemy Records Manager

## ALWAYS READY FOR DISCOVERY OR AUDITS

When it comes time for an audit or discovery, the manager can quickly and accurately produce records using the powerful Alchemy 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.

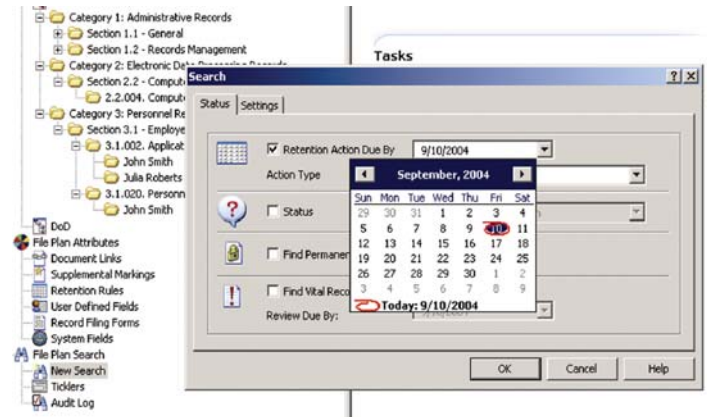
## CREATING RETENTION RULES

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



## 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.

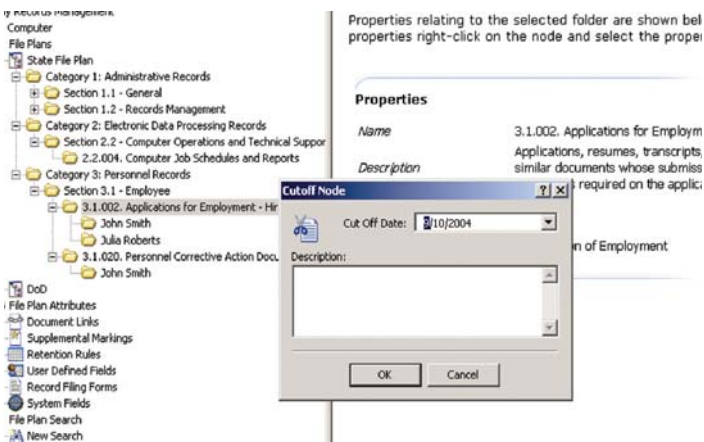


## ABOUT CAPTARIS, INC.

Captaris, Inc. is a leading provider of software products that automate business processes, manage documents electronically and provide efficient information delivery. Our product suite of Captaris RightFax, Captaris Workflow™ and Captaris Alchemy® is distributed through a global network of leading technology partners. We have customers in financial services, healthcare, government and many other industries, and our products are installed in all of the Fortune 100 and many Global 2000 companies. Headquartered in Bellevue, Washington, Captaris was founded in 1982 and is publicly traded on the NASDAQ National Market under the symbol CAPA. For more information, please visit [www.Captaris.com](http://www.Captaris.com).

## THE CUTOFF FOLDER

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



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