



workFile:
A Product Comparison Overview with
IMR Alchemy



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1. Overview

This document compares the workFile storage module to the IMR Alchemy document management product. This document looks at the business comparisons between the products as well as some of the more technical differences.

Business can use this comparative study paper to get a quick insight into the workFile product suite, its modules and compare workFile with other leading solutions.

For more information on an individual module, or the workFile product suite as a whole, please contact a member of one degree consulting staff, they will be more than happy to answer any of your questions. Please use the following contact details:

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2. IMR Alchemy

2.1. Overview

IMR have been established for a number of years and their Alchemy product suite is a well established product offering in the data storage and archive market arena. IMR with their product, Alchemy, now service over 10,000 customers based in 40 different countries. The Alchemy product family can be found in many small to medium organisations, though it is also used by larger organisations primarily to solve departmental storage and archive issues.

IMR provide a number of solutions based on the core Alchemy product. There are primarily three Alchemy products, these are:

- Alchemy Premium
- Alchemy Pro
- Alchemy Gold

Alchemy Premium is a scalable, multi-user, Windows server based solution. It is targeted at medium to larger sized organisations that require a solution to deal with larger volumes of un-structured data. In addition Alchemy extensions such as internet enablement can be made available with Alchemy Premium.

Alchemy Pro is targeted at service bureaus that manage documents for third party customers. This can be done through the internet, off-site archives or via CD/DVD. Again any of the Alchemy extensions can be used with Alchemy Pro.

Alchemy Gold is targeted at small workgroup / individual user implementations. It can provide a read access for up to 25 users.

The Alchemy family suite is primarily a data storage and archive solution, however it has evolved to include many document management features, such as full text searching of word documents for example. It is often termed as document management when solutions are used to stored documents in an electronic fashion. (This is technically incorrect, as document management allows the management and manipulation of documents, such as version control).

The Alchemy family also supplies a complete data capture environment. This includes a complete (though limiting) scanning interface highly suitable for small simple scanning requirements. The scan and index application does provide facilities as OCR (Optical Character Recognition) however it is limited to the number of features it can supply (Bar Code, Forms Recognition, ICR, quality control etc.)

The index and retrieval areas of Alchemy are highly structured. Form types can be created based on the properties identified to locate an item within the archive. This makes the searching process slightly easier. Searches are delivered in a similar fashion to windows explorer, with large lists matching your requirements are displayed on the right hand pane of the screen. Property information can also be configured; however the chosen properties are shown to all other users when searching.

The Alchemy family can also be supplied with 'Data-grabber'. This is a tool that allows data and files to be inserted into the Alchemy repository. It takes a basic configuration file and can

read in images (scanned documents for example) from a directory and marry up structured data captured in corresponding data files to 'index' the document.

Finally, a number of Alchemy 'add-ins' can be purchased to provide more functionality, such as an intranet / internet based access to the repository.

2.2. Why workFile

Why choose workFile and not IMR Alchemy? There are a number of answers to that particular question. The IMR Company and product are more established within the marketplace, IMR have many more customers using Alchemy and have an established client base. All of these points are true. However, you must look at the two very different products to really see why a company should choose workFile.

When looking at key business and technical requirements and comparing workFile to Alchemy, the arguments for workFile become far more compelling. Let's look at some of the key areas and difference between the two products:

- Data Capture
- Import procedures
- Repository Management
- Searching
- Delivery
- Integration
- Scalability
- Additional Modules / requirements

2.2.1. Data Capture

Data Capture within IMR Alchemy is primarily carried out through the Alchemy scanning interface or through the 'Data-grabber' tool. The scanning interface provides users with the ability to utilise a document scanner, scan and capture files. These files are then stored as 'Multi-Page' Tiffs (an industry standard). The scan application is very proficient for small, simple scanning requirements, however when dealing with larger volumes and broader requirements the scan application is not recommended due to its inflexibility and lack of certain features (such as forms recognition).

With the additional purchase of Data Grabber, IMR Alchemy can utilise other scanning solutions, such as the industry leader, Kofax Ascent. However, there is then a two step release process, one that can prove to be a troublesome area. Kofax releases the files in a format ready for the 'Data-Grabber' to retrieve and then insert into Alchemy.

In comparison the workFile product suite does not contain any scanning elements. Instead the workFile product suite is 'geared' to a 'best of breed' scanning solution. This enables customers to utilise scanning solutions that may already be in place, or take advantage of such market leaders as Kofax and have the Kofax application tightly integrate with workFile and release captured data and images directly, quickly and efficiently into the workFile repository. This minimises processing time and space on servers as well as administration staff input / monitoring of the process. This allows organisations to take full advantage of all the features within Kofax to speed up and realise efficiency in their data capture processes (for example utilising Bar codes, Forms recognition, VRS, quality control etc).

2.2.2. Import Procedures

Import procedures from IMR Alchemy are all done through the 'Data-grabber' tool. This tool requires minor configuration, is highly powerful at importing data and files if the system has been set up correctly. The 'Data-grabber' solution is inflexible in its uses, not flexible enough to deal neither with other applications injecting data into the repository directly nor in a real time manner. In addition the 'Data-grabber' tool is not intelligent enough to note if only index fields for example have been updated (the values in which files are found by).

The IMR Alchemy family does provide an API, this allows other applications / programs to interact with the API and in effect use the repository. This API however is very limited and doesn't provide the freedom application developers / third party applications require.

In comparison the workFile product suite allows numerous import procedures to be built. An import service is available that acts much in the same vein as IMR's 'Data-grabber'. However the workFile product suite also allows tighter import procedures to be configured utilising the complete and fully open .NET API and XML Web Services API. This allows bespoke integration points / applications to be written and implemented quickly. In addition third party applications can inject files / data into the repository using the API. Full examples can be provided on how best to use the API allowing application integration to be completed quickly and easily while boosting application integration and efficiency within the organisation.

2.2.3. Repository Management

The IMR Alchemy product is well known for its speed of searching. Ease of searching can be diminished when larger archives have to be searched. Often the product requires larger systems to create multiple databases and searching then has to be switched on to one, many or all of the databases to locate files.

In addition the system can be harder to manage when a 'database build' action is being carried out. This action stores the files and information in the database. It is this action that can slow down searching processes while being completed. In higher volume environments / systems that require access to captured files quickly, this could prove to be trouble some. With database builds required to make available newly captured files, retrieval times and processes suffer due to the database build time.

In comparison the workFile product suite is a multi-threaded suite allowing multiple processes to occur simultaneously. Newly captured files are inserted with no impact on searching capabilities. In addition a single workFile library can hold Petabyte of information before a new library needs to be created. There is no limit to the number of libraries that can be accessed either, however cross library searches are slightly slower than single library searches.

The workFile product suite can be implemented for a single department, however its internal capabilities and massive scalability allow the system to grow and service a complete global enterprise.

2.2.4. Searching

The IMR Alchemy product allows forms to be created to make searching for files quicker and easier. These forms are excellent for small and quick internal searches. However, if any application integration is required or more advanced search facilities for example across multiple types of files, the forms implementation can prove to be a little troublesome. A form can be created for each type of file type to be searched. While forms are relatively quick to create, they still require administration staff knowledge / training to implement this. This

means when your system needs to grow and store many different file types, you must create many search forms if you want to maintain the ease of use of the system.

In addition the presentation of search results is the same for all users (when using the web interface). It can prove to be hard to locate the right document quickly from the returned result set.

When clicking on a file index / property details can be displayed at the bottom of the screen, however this means that users often spend time selecting images / files before they locate the desired image.

In addition certain functions, such as 'View' require multiple clicks and in some cases an application installed on the client machine. Multiple document views are also impossible as too are multiple functions.

In comparison the workFile product provides a rich search environment. Searching can be carried out in a number of ways within workFile. The simplest is by searching based on a template. Template searches are similar to IMR's Forms; however they can be set up quickly and easily by administrators and even individual users. An individual user can create their own search templates, and within them they can also include some pre-selected property values.

Secondly advance search facilities exist for search requirements that may consist of a number of clauses or across multiple file types or even libraries. Again these can be 'templated' by the users and stored in their profile to make searching easier and quicker.

A complete search facility is available where users select the index property they wish to search on and then enter the value. Any number of index properties can be selected allowing cross file type and library searching.

All templates can be stored within the user's profile, along with individual files / records. These are all short cuts, allowing a user to quickly view a file / record without conducting a search, this is ideal for users who require access to a file multiple times (for example working on a customer case).

Finally users can search through the repository in a folder like fashion. This is ideal for smaller solutions and is something many users will be familiar with without any training. It is somewhat harder with larger volumes and can pose the same problems as using explorer to locate files.

Results of searches are shown in a grid like fashion. The grid can be configured to show to individuals specific index property values. The grid also contains links to functions such as view, copy local, re-index, check-out etc. This means the users can quickly see the file they wish and with one click access the function they require.

2.2.5. Delivery

The IMR Alchemy product suite is delivered to users through a 'thick-client' (program on the machine) application typically. An internet / intranet ('thin-client') is available as an additional purchasable plug in to the product.

The system also uses its own bespoke database, which can be accessed through ODBC and / or the applications API. The application API is available in COM format.

For small applications a single machine can run the complete Alchemy product in a stand alone environment. This is excellent for managing personal documentation. Larger implementations require a server-client environment. When using the web 'plug in' IIS is required. Please note the web application can not be modified, however web applications can be written to utilise the COM based API.

In comparison the workFile product suite utilises Microsoft's SQL database and dedicated storage areas. All applications / modules are delivered through ASP.NET (internet / intranet thin client environment) though 'thick-client' applications are also available. This is because administration and desktop support is at a minimum when the user requires no additional software on their machine to access the repository.

The system can be backed up through simple SQL backup facilities provided by Microsoft's SQL database software. Files stored within the repository are automatically backed up when using recommended storage media. However, in addition backups can be taken of the file system and later re-stored.

The system cannot be accessed through ODBC or in any other way except through the modules or API layer. All system access and integration must and can only go through the workFile API. This allows other applications to easily integrate and utilise workFile. In addition it raises security and audit details stored within the system, logging each and every event within the suite while maintaining the configured security schema.

Applications can be configured for clients quickly and easily. In addition bespoke interfaces can be used to access the system. These when used in conjunction with specific customer business rules mean the system becomes increasingly easier to use, train users on, manage and maintain for an organisation.

2.2.6. Integration

Integration has been touched on briefly within this document already. However, IMR Alchemy offers integration primarily through its API. ODBC connections can also be used however knowledge of the Alchemy data schema would be required.

The IMR Alchemy API can be referenced within COM based applications, and requires some coding to utilise. Simpler integration such as the injection of information can be carried out through automating the 'Data-grabber' tool.

In comparison integration was a key design consideration of workFile. Integration can occur through the .NET API layer or the XML Web Services layer, allowing cross platform, cross technology application integration. The API is fully open and is fully documented with examples, allowing application integration to be created quickly.

In addition application connectors can also be used to connect / create bridges between systems. These connectors utilise XML documents and XML schemas to identify the integration process and the data that is to be integrated.

Finally, application connectors and integration points can be configured solely with your business requirements in mind, for example have workFile integrate with your accounting package as well as your CRM solution.

2.2.7. Scalability

The IMR Alchemy product can be a scalable product when using the Premium edition of the software. The system scales but with it does the requirement of administration tasks such as form design, cross database searching and performance issues.

Because of these reasons and the issues regarding database building and the locking of the database while this process occurs, means that in our opinion Alchemy is targeted at simple storage and data archive when scaled to a larger implementation.

In comparison the workFile product suite was designed for all of its modules to reach across the complete enterprise. Utilising OO and transactional statuses workFile is a stateless application that allows all modules to scale from simple workgroup type solutions, to global enterprise wide solutions.

With a single library, workFile can be used for a simple / small implementation and grow with the company and its requirements to store and manage files. A single library can scale up to numerous Petabyte. Utilising such storage units as provided by Grau Data Storage, units can also grow with the workFile repository, starting small at first but with the capacity and scalability to grow to 3 Petabyte. With workFile there is no limit to the number of these physical storage units you can use, allowing workFile to become the single repository for your complete enterprise.

The workFile applications can utilise a number of workFile libraries, each library could be located in a distributed environment across the globe. Due to its transactional and stateless implementation this means performance is maintained when used in such a large scale solution.

2.2.8. Additional Modules / requirements

IMR Alchemy deals solely with data storage and some functions of document management. Additional modules can be purchased to web enable the system for example. In addition IMR as an organisation offer other solutions, such as records management facilities. However, this is the full scope of the Alchemy product.

Simple document routing can be created, allowing a flow / process for a document to follow, aiding in working processes. In addition and Audit module can also be purchased.

In comparison the workFile product suite is a single repository that provides multiple functions if required. Organisations requirements dictate which modules are required. When comparing workFile with Alchemy, we are only comparing the data storage and archive module of workFile, workFile storage.

It is worth noting that such features as simple document flow and auditing are part of the core workFile product suite, these are not add-on modules. All events are logged and stored within the internal auditing records within workFile. There are no internet modules provided as additional modules within workFile, as the system is delivered through an internet / intranet environment.

workFile is a flexible product that can be used to fit your organisation and solve other problems also. Other modules such as content, case, records, CRM and BPM build on your investment in workFile and help raise efficiency further within your organisation:

workFile content provides a complete document management solution, providing such features as version control, check-in, check-out, collaboration, copy files locally, archive, retrieve from archive, link file types to a workflow / business process, publish etc. This module allows your organisation to take control of internal documentation, templates, publications, etc and manages the complete file lifecycle.

workFile case allows you to manage customer cases simply and easily. The case module integrates with all other modules providing a clear view of the customer / supplier and all the details / files you may require to process a particular piece of work. Features include, dairying work, holding work, referring to other users, referring to other departments, quality assurance processes, review procedures etc. The workFile case module is an organisations first step towards a workflow / business process management system. The case module therefore helps increase your organisations compliance and management of work, while raising efficiency and cost savings.

workFile record allows structured data to be captured and utilised. Allowing categorisation of data allows workFile to build records, these can be related to customers, patients, deliveries, and suppliers etc, and can all be treated as separate records or inter-related records. The workFile records module allows organisations to take control of all their data and make it accessible through a single desktop application.

workFile CRM builds on the records module and provides a complete CRM solution, from managing marketing campaigns, marketing literature (stored within workFile with templates etc), to events, conferences, to present customers, their information / details, their interactions with your organisation etc. Used with other workFile modules, workFile CRM truly provides a 360 degree view of your customers, all their information and a single point of access to their structured and un-structured data stored within workFile or other line of business applications.

workFile BPM allows business processes to be mapped and followed, with the system driving work through the process, maintain security, audit logs and allowing management staff to monitor performance, customer satisfaction etc. The workFile BPM is the final module in providing an efficient, paperless organisation that can now experience greater savings due to vast increases in performance and efficiency while providing customers with a better service experience.

For more information on workFile and its modules please review the related document:

workFile: A Brief Business Overview

This document can be located at the following URL:

<http://www.consulting-onedegree.com/downloads/whitepaper/business%20overview%20of%20workfile.pdf>

3. Contact one degree consulting

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