Meet your Presenters

Daniel Jenab

Project Manager

+ Master's Degree in Communications Management from George Washington University

+ Experience managing a variety of projects covering the spectrum of our technologies – Kofax, Hyland, Infor, and Yoga

+ De facto office personal trainer and nutritionist

Meet your Presenters

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Patrick Wise
Senior Account Executive

+ 16+ years working with Enterprise Content Management and Digital Transformation solutions

+ Experience working across verticals, including enterprise as well as SMB segments

+ Works out – but not as much as Daniel

What We're Gonna Talk About

+ **The Problem with Supporting Multiple Enterprise Systems**

+ **What is Managed Services & What isn't Managed Services**

+ **Customized Managed Services, Support Tiers, & SLAs**

+ **A Day in the Life of Managed Services**

+ **Summary & Questions**

Disclaimers & Fine Print

+ **Infor Alliance Partner, CloudSuite Specialized**

+ **Kofax Platinum Partner**

+ **Hyland**
  - RPI Consultants is not an authorized solution provider but has some of the most experienced Perceptive Content & OnBase consultants in the industry

+ **KnowledgeLake Partner**

+ **Yoga Flexible Software by RPI Consultants**

The Problem with Supporting Multiple Enterprise Systems

It's hard to maintain the right level of knowledge and experience to be able to simultaneously manage system growth, implement new features, and resolve system and end-user issues effectively and efficiently. Cost cutting and normal attrition exacerbate the issue making it nearly impossible to cross-train effectively.

# Enterprise Technology Architecture

+ **ERP (Infor, Oracle)**

+ **CRM**

+ **ECM**

+ **BPM**

+ **RPA**

+ **Integrations**

+ **VPN**

+ **Office 365 / Active Directory**

+ **Intranet**

+ **Reporting & Analytics**
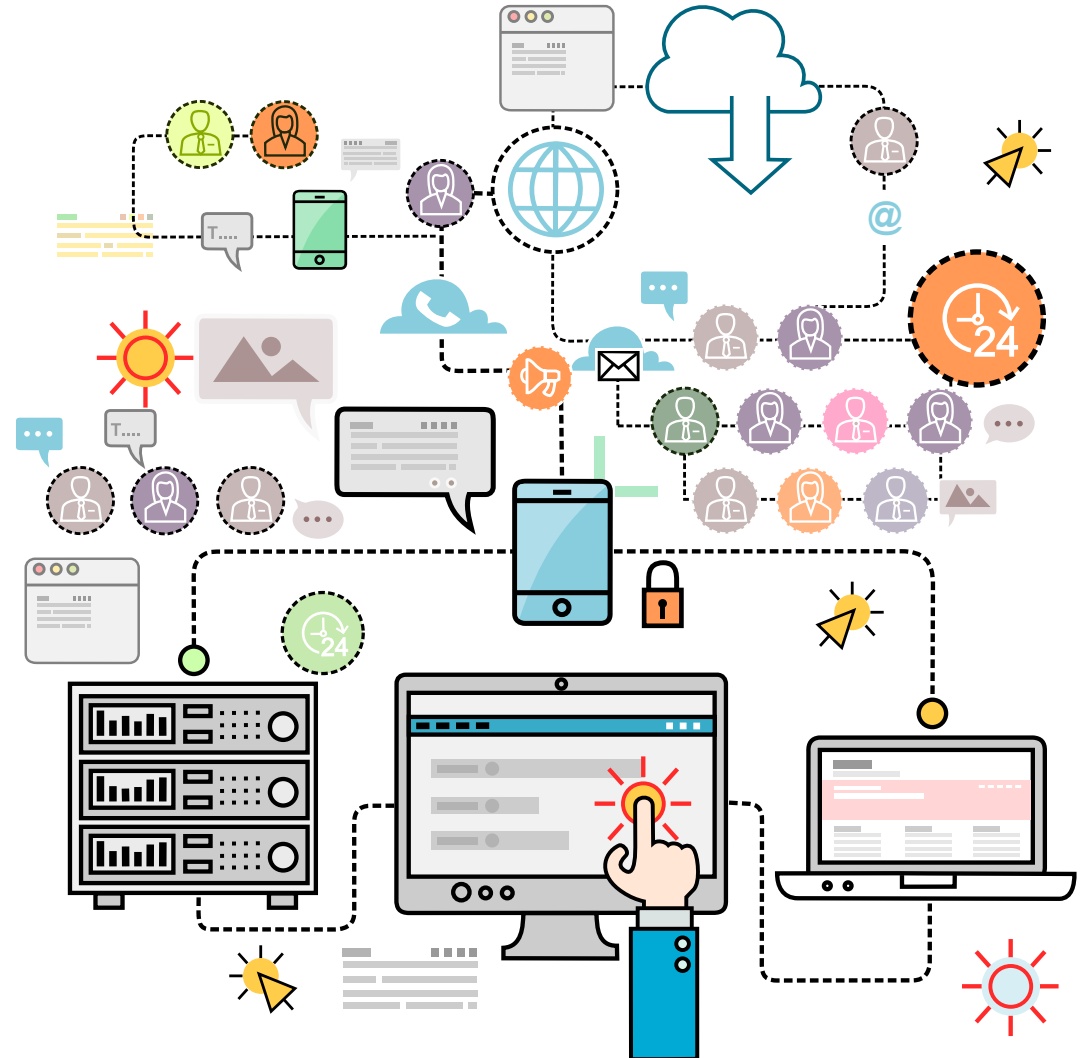
Knowledge Requirements

+ **End User Training & Support**

+ **Functional Requirements & Design**

+ **Software Configuration & Testing**

+ **Custom Development & Testing**

+ **Network & Integrations Support**

+ **Server-side Support**

Additional Impacts & Challenges
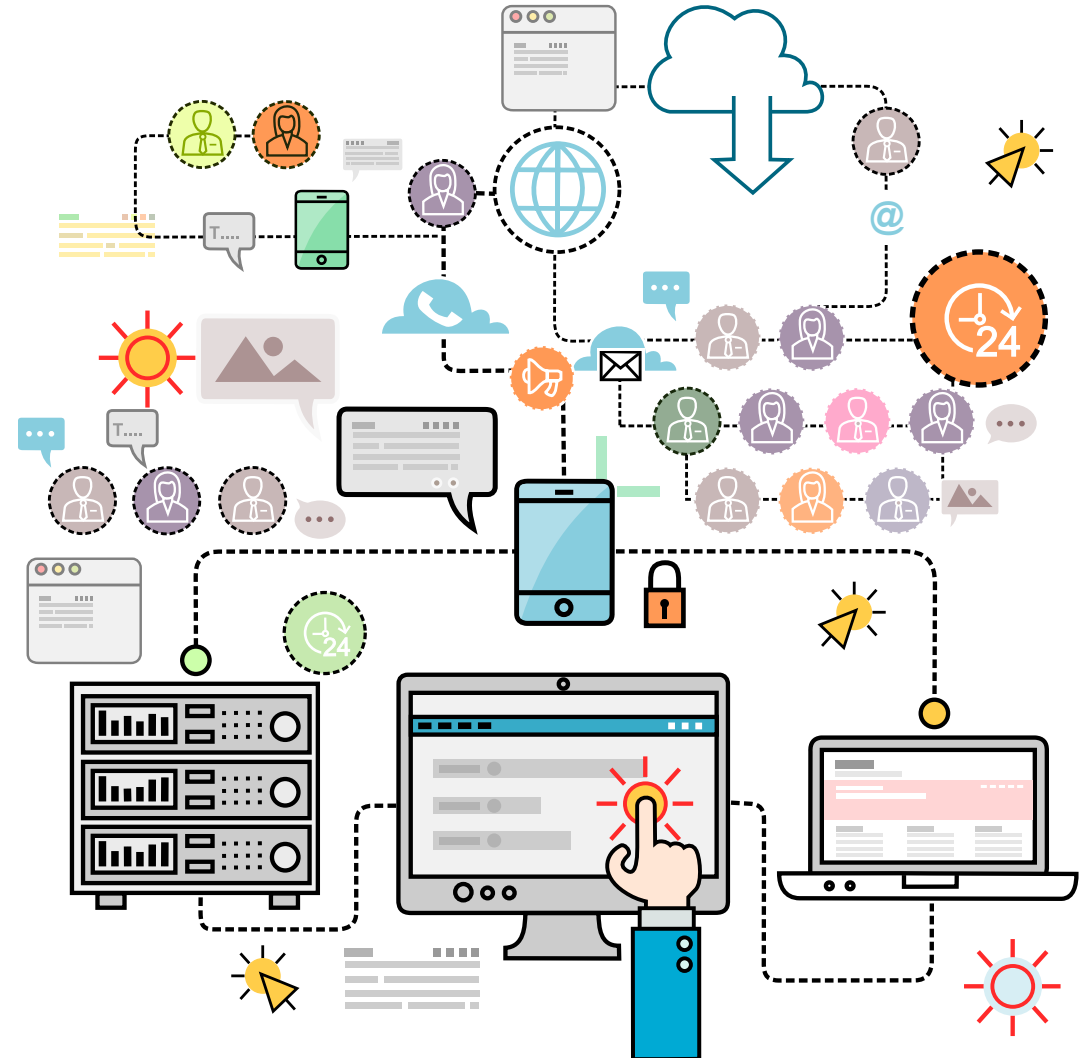
+ **Poor Change Communication from Vendors**

+ **Attrition & Backup Support**

+ **Knowledge & Expertise Silos**

Consequences

+ **Poor End-User Support & Resolution**

+ **Poor Performance & System Issues**

+ **Increasing Costs Related to Hacks & Temp Fixes**

+ **Falling Behind on Upgrades / Supportability**

What is Managed Services & What isn't Managed Services

What Managed Services is Not

+ **Support & Maintenance Service Agreement**
  - Vendor Specific Support Agreement

+ **Pay-as-you-Go Support**
  - Ad-hoc support usually in place to solve for a particular issue/set of issues

+ **Straight Outsourced IT Support**
  - RPI resources will be assisting you, not outsourced contractors

+ **New Implementation Project**
  - E.g. New Solution Design & Implementation

What Managed Services is (or could be)

+ **On-demand Support**

+ **Remote System Administration**

+ **Upgrade & Patch Management**

+ **Road-mapping & System Enhancements**

+ **Existing Solution Expansion**

+ **Integration Maintenance**

+ **Custom Development Maintenance**

Customized Managed Services, Support Tiers, & SLAs

Customized Managed Services

+ **Resources and contract appropriately aligning with Client's software**

+ **Sample Managed Services Package:**
  - Workflow automation and optimization
  - Capture optimization
  - New business unit setup
  - New hire training & support
  - Supplemental support of additional module rollout
  - Interfacing with other applications and integration points
  - Analysis of individual departmental needs and recommendations

Available Support Tiers

+ **Tier 1**

+ **Tier 2**

+ **Tier 3**

Service Level Agreements

+ **During Business Hours**
  - **High Priority**
  - **Medium Priority**
  - **Low Priority**

+ **Outside Business Hours**
  - **High Priority**
  - **Medium Priority**
  - **Low Priority**

Product Competencies

+ **Perceptive Content by Hyland**

+ **Brainware by Hyland**

+ **OnBase by Hyland**

+ **Kofax Capture**

+ **Kofax Transformation**

+ **Kofax TotalAgility**

+ **Infor & Infor APIA**

+ **Yoga:**
  - Forms
  - Capture
  - Connect
  - Docs

A Day in the Life of Managed Services

Tools & Resources with RPI Consultants

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+ **Ticketing**

  - All reported issues are tracked, managed, and documented
  - Reporting issues is as simple as e-mailing a customized e-mail address

+ **Communication**

  - Monthly / quarterly / annual meetings

+ **Etc. etc.**

Perceptive Content & Brainware

+ **About Company**

- Large vehicle manufacturing company in Midwest
- Several successful Perceptive Content and Brainware Upgrade & Enhancement Projects

+ **Needs**

- Perceptive Content & Brainware administration
- Brainware enhancements

+ **Managed Services**

- Brainware Learnset creation
- Brainware line-matching improvements
- Interface testing
- Custom development (eForm and iScript) support
- Environment refreshes
- Critical issue resolution

OnBase & Brainware

+ **About Company**

- Large health-care organization in Eastern United States
- Successful projects for Human Resources and Accounts Payable departments

+ **Needs**

- OnBase & Brainware Administration

+ **Managed Services**

- Health checks for both OnBase and Brainware environments
- Brainware enhancements (STP, PO matching, scanning & capture)
- System integrations (Duplicate checking between OnBase and Workday)
- General system monitoring & issue resolution

Infor APIA

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+ **About Company**

  - Large healthcare organization in Southern United States
  - Successful Accounts Payable Invoice Automation project

+ **Needs**

  - Lawson v10/Perceptive Content/Brainware/Yoga Administration
  - Enhancements to completed project

+ **Managed Services**

  - Infor migration support
  - Ongoing APIA enhancements (APIA custom flow for EDI ingestion through Yoga Capture)
  - Yoga Docs enhancements
  - Brainware enhancements

Summary & Questions

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Learn more at www.rpic.com.

ABOUT RPI CONSULTANTS

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+ **100+ Full-time Consultants**
  - Including Project Managers & Architects

+ **Based in Baltimore, MD**
  - Additional offices in Tampa, FL, and Kansas City, MO

+ **Technical & Professional Services**
  - Technical Strategy & Architecture
  - New Installations, Upgrades, & Migrations
  - Process Analysis, System Design, Implementation
  - Managed Services & Staff Augmentation
  - Project & Change Management

infor Alliance Partner
CloudSuite™ Specialized

KOFAX
Platinum Partner

Hyland™ | Authorised Solution Provider

Product / Vendor Partnerships

KOFAX PLATINUM PARTNER

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+ Service Provider / License Reseller

- Kofax Capture
- Kofax Transformation
- Kofax TotalAgility
- Kofax RPA
- ReadSoft Online from Kofax

+ Industry & Solution Expertise

- Accounts Payable & Financial Process Automation
  - *Invoice Processing*
  - *Vendor Document Management*
  - *Packing Slips Automation*
- Human Resources / Human Capital Management

KOFAX
Platinum Partner

"Kofax's Intelligent Automation software helps organizations transform information-intensive business processes, reduce manual work and errors, minimize costs, and improve customer engagement."

- www.kofax.com