

2021 Budgeting for Enterprise Content & Intelligent Automation

It's nearly the end of the year, and for most of you that means budgeting and project planning for your business applications and systems. Before you start allocating funds or reserving resources, let us help with a few recommendations on where you can get the most out of your budget.

Jim Fall

Senior Account Executive

- + 15+ years experience working with Perceptive Content (ImageNow), Hyland and Kofax products
- + President HIMSS Indiana Chapter
- + Industry focus
 - Healthcare
 - Higher Education
 - Manufacturing
- + Looking forward to pulling out my skis



Patrick Wise

Account Executive

- + 15+ years experience working with enterprise content and document management, automation and data capture solutions
- + Industry Focus:
 - Healthcare
 - Manufacturing
 - Finance
- + Love all things combat sports



- + **Product Roadmaps & End-of-Life Dates**
- + **Enterprise Software & Technology Strategies**
- + **Working with a Trusted Partner**
- + **Questions & Summary**

Product Roadmaps & Important End-of-Support Dates

All the great upcoming features and enhancements, and all the not-so-great end-of-support dates that should be considered before planning and budgeting your next year of enterprise technology projects.

+ Hyland – Perceptive Content & OnBase

- Normal support escalation is no longer offered for versions of products that are at end of support and the software is not released for customers to download. **No updates or upgrades are made to the release.** Hyland offers Extended Support for versions of products that have reached end of support, which provides only limited technical support.

+ Kofax

- Normal support escalation is no longer offered for versions of products that are EOS and the software will no longer be available for download. No updates or upgrades are made to the release. Please see the Legacy Version Support Program section for options for customers continuing to use these versions.

+ Operating Systems/Database Compatibility

- For each Kofax release, the supported operating systems and database platforms are evaluated to determine if there are either new versions to support or older versions for which to drop support. We will not support versions that are not supported by the manufacturer.
- For each Hyland release, the supported operating system and database platforms are evaluated to determine if there are either new versions to support or older versions for which to drop support. The general guidance for each release is that Hyland will support no more than two versions of any operating system or database version.

Perceptive Content EOS

+ **Foundation EP2 Current Version**

- EP3 scheduled for December 2020

+ **Version 7.1.5 – 7/1/2020**

+ **Version 7.2.2 – 5/1/2021**

+ **Version 7.2.3 – 8/1/2022**

+ **Version 7.3 – 7/1/2023**

Brainware EOS

+ **Brainware (Intelligent Capture)**

- Foundation EP1 – Current Version
- Version 5.7 – 7/1/2020
- Version 5.8 – 10/1/2021
- Version 5.9 – 7/1/2022

+ **Brainware for Invoices**

- Version 2.7 – 11/1/2020
- Version 2.8 – 9/2/2021
- Version 3.0 – 6/1/2022
- Version 3.2 – 1/1/2023
- Version 3.3 – Current Version 9/1/2023

+ **Extended Support Schedule**

- OnBase 15 – December 31, 2020
- OnBase 16 – December 31, 2021
- OnBase 17 – December 31, 2022
- OnBase 18 – December 31, 2023
- OnBase Foundation EP4 – Current Version
 - EP3 is Current Long Term Release version

+ Kofax Capture

- Version 10.0 – 8/19/2020
- Version 10.1 – 8/19/2020
- Version 10.2 – 8/19/2020
- Version 11.0 – Current Version

+ Kofax Transformation

- Version 6.2 – 5/18/2021
- Version 6.3.1 – Current Version

+ Kofax RPA (Kapow)

- Version 10.0 – 9/29/2020
- Version 10.1 – 3/19/2021
- Version 10.2 – 9/18/2021
- Version 10.3 – 3/29/2022
- Version 10.4 – 3/18/2023
- Version 10.5 – 4/12/2023
- Version 11.1 - Current Version

+ TotalAgility

- Version 7.3 – 2/22/2021
- Version 7.4 – 7/21/2021
- Version 7.5 – 7/6/2022
- Version 7.6 – 7/17/2023
- Version 7.7 – 7/7/2023
- Version 7.8 - Current Version

+ AP Agility

- Version 2.0 – 2/20/2022
- Version 2.1 – 10/29/2022
- Version 2.3 – Current Version

+ IP Agility

- Version 1.0 – 6/23/2021
- Version 1.1 – 10/29/2021 Current Version

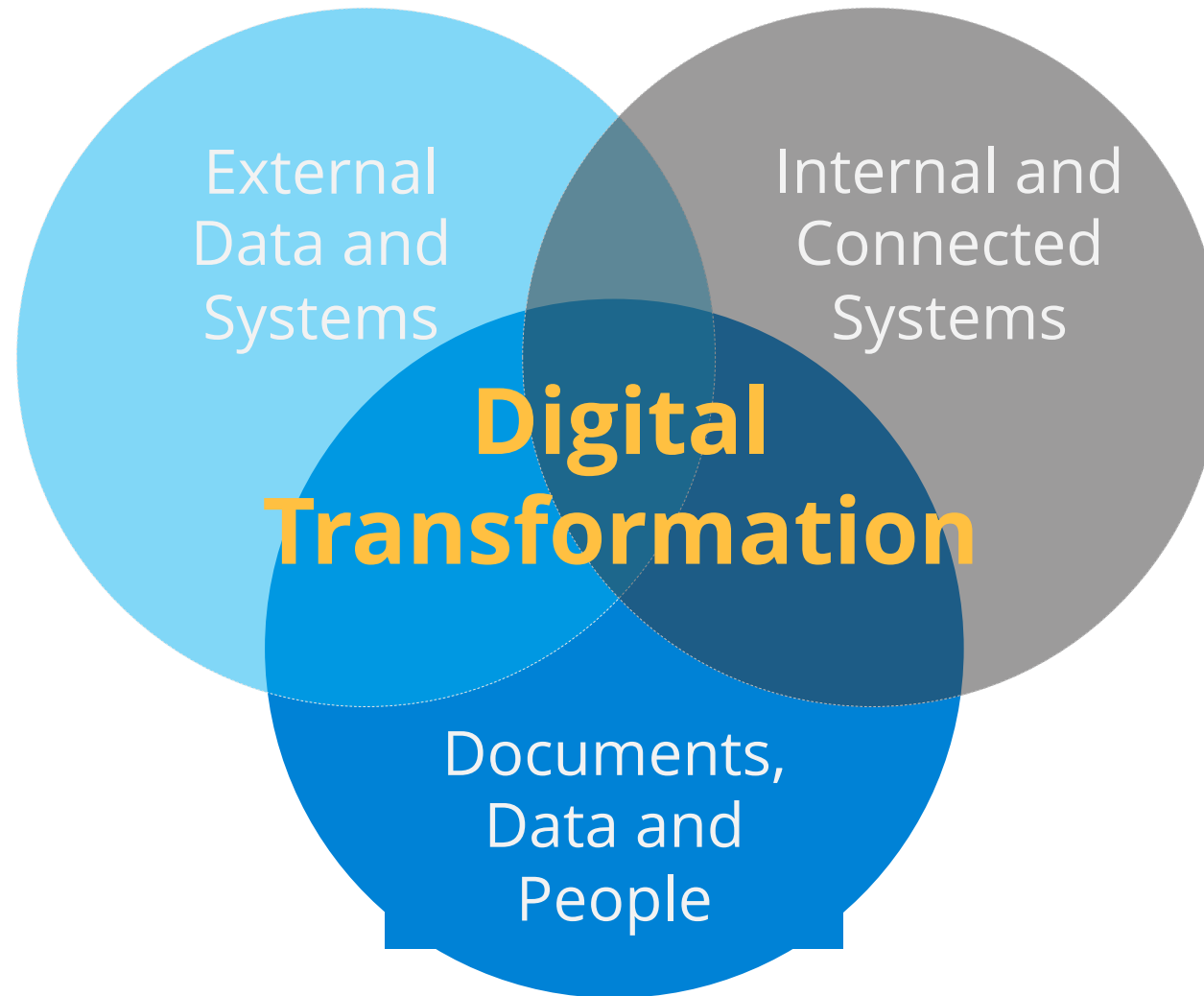
Enterprise Software & Technology Strategies

Let us share some tips and tricks on how to simultaneously manage roadmaps across your competing and equally important enterprise software and technology strategies.

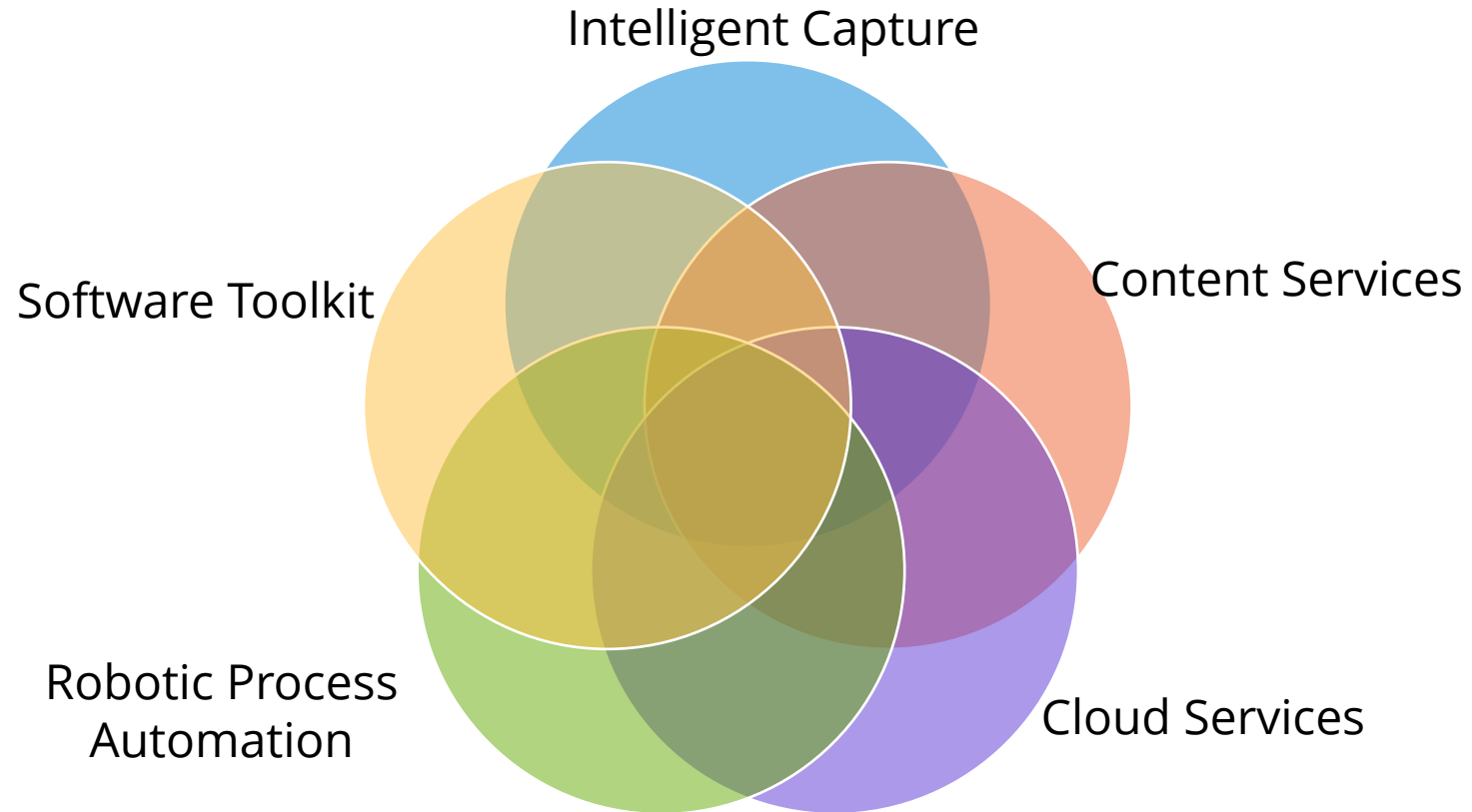
Challenges

- + **Overwhelming amount of content**
- + **Need to support remote work environments**
- + **Sharing information and documents across systems**
- + **Locating scattered information for business processes**





Enterprise Technology Focus Areas



- + Document Ingestion
- + Image Cleanup & Processing
- + Data Extraction w/Advanced OCR
- + Data Validation



Definition/Description

- + **Gartner defines a content services platform (CSP) as the foundational component in an organization for the management and utilization of content**
- + **A set of services and microservices, embodied as an integrated product suite and applications that share common APIs and repositories, to exploit diverse content types and to server multiple constituencies and numerous use cases across an organization.**

WHAT IS A CONTENT SERVICES PLATFORM?



60%
OF END USERS
PREFER
CLOUD
OVER ON-PREMISES*

* IDC: Industrial Customers Are Ready For The Cloud – Now

Gartner forecasts that by 2022, 90% of companies in the market will be using cloud services



+ Robotic Process Automation

- Automation of manual, routine and repetitive data entry tasks
- Programmable Software Robots
- Open / Login for Local Apps & Web Portals
- Perform Front-end Searches in Infor and other ERP platforms
- Read/Write Data to Temp / Infor Tables
- Desktop Automation



DOCS

HTML Based + Java-free
Document Web Viewer

FORMS

Quickly Design, Deploy, & Capture
Data from Digital Forms

CAPTURE

Versatile content capture solution that
includes email capture and import from file.

CONNECT

Standardized API Integrations for Enterprise
Systems

Working with a Trusted Partner

We might be a little biased, but here's all the reasons we think RPI Consultants is a good partner to trust with your short- and long-term enterprise software roadmap and implementations.

Analysis Rating

Component		Comments
<i>Overall AP Health Check</i>	Yellow	The system is often working for its intended purpose – invoices are getting paid. However, the system is implemented far from a best practice approach, and RPI has concerns about the lack of automation and scalability of the current solution.
<i>Technical/Infrastructure</i>	Yellow	Some iScripts are inefficient or are encountering errors, but these are mostly caused by their functional usage. There are often multiple scripts that have been copied and small changes made, causing a large number of scripts that are performing the same job – these should be combined to improve maintenance.
<i>Security</i>	Green	Best practices have been implemented using security groups for AP, Vendor Maintenance, and Managers. Users are assigned to appropriate groups, and groups are maintained from Active Directory.
<i>Automation</i>	Red	The workflow is designed to be high-touch – most documents will be seen by an AP Clerk a minimum of two times prior to exception handling.
<i>User Experience</i>	Red	Users are frustrated with highly manual, repetitive tasks. Approvers are required to use WebNow which has a dated interface and lacks flexibility with browsers and devices. Managers lack visibility into errors and inefficiencies.
<i>Workflow/Document Lifecycle</i>	Red	Technical integrations force a parallel process where Lawson and Perceptive both receive data from Brainware. Document lifecycle is difficult to measure, as document workflows begin and end at different points depending on obscure criteria. There are also no retention policies and documents are retained permanently.

Process

+ Strategy

- Evaluate your current business processes and technology infrastructure
- Recommend enhancements or changes

+ Measure Server and Database Performance

- Technical Health Check

+ Identify Process Improvements and Efficiencies

- Solution Health Check of existing applications
- AP Automation Score Card

Managed Services

+ Term-Based +

+ Flexible +

+ Lower demand (less than 40 hours per week) +

+ Continuous need over longer term +

Staff Augmentation

+ 32-40 Hours per week +

+ Shorter-term (6-12 Months) +

+ Full staff operation (attend meetings, logged into systems – reports to Client management) +

- + **Broadly scoped for flexibility**
- + **Price points for pay up front vs. time and materials**
- + **Minimum \$25k**
- + **Hyland Software, Kofax and RPI's Yoga Flexible Software**

- + **Application development**
- + **Custom scripting**
- + **Web API**
- + **Application enhancement and customization**
- + **Document and data migration**

Questions & Summary

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+ **130+ 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

+ **Technology Agnostic**

+ **Experience to help Clients**

- Wide range of ECM/Document Management Systems
- Wide range of Capture solutions
- Wide range of ERP systems
- Deployment solution
 - *Cloud*
 - *On-Premise*

- + **Product Roadmaps & End-of-Life Dates**
- + **Enterprise Software & Technology Strategies**
- + **Working with a Trusted Partner**



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Learn More at www.rpic.com