Managed Services increase ROI and expand the impact of your **Etrieve** deployment through ongoing strategic planning, advanced consulting, and continuous system improvement.

Optimize Your Softdocs Solutions with Managed Services

Softdocs' Managed Services connect your institution with **Etrieve** system experts and technical resources, allowing you to strategically and efficiently advance your deployment of enterprise content management. Continual improvement, expansion efforts and upgrades are handled by the project professionals of Softdocs' Managed Services team–as you identify, map and scope processes that can be automated for additional productivity gains. With your Managed Services consultant leading the maintenance and expansion of **Etrieve** across your campus, in-house IT can concentrate more heavily on technology strategy, and the day-to-day, now being able to look past the details of your technology deployment.

Services in scope include advanced consulting and after-hours production system upgrades: all Managed Services customers receive an allotment of discounted professional services hours, which can be utilized to advance key projects and drive digital transformation institution–wide. The number of hours you receive correlates to both level of service (Premium, Advanced or Standard) and term length selected (3, 6 or 12 months).

Managed Services agreements are available to institutions leveraging **Etrieve** in the cloud or on premises; however, production system upgrades only apply to institutions with an on-premises deployment. While Managed Services advanced consulting hours are delivered remotely, on-site services are available to customers at a discounted rate, during the term of the agreement.

Multiple Service Levels
Premium, Advanced or Standard service levels available

Strategic Planning
Ongoing and iterative planning leads to continuous improvement of your Etrieve deployment

Advanced Consulting
Coordinate with **Etrieve** experts for strategic system growth and expansion

Production Updates
Advance your system with minimal disruption through after-hours upgrades

Use Cases for Managed Services

▶ Accelerate ongoing projects with technical resources and the expertise of the Softdocs Managed Services team.

▶ Boost ROI through the expedited design of new e-forms and workflows, or implementation of **Etrieve** in additional departments.

▶ Implement change faster and more conveniently, following best practices and with recommendations from system experts.

▶ Free up IT staff to define the business processes that deliver the maximum value to the institution.

▶ Outsource system administration to fill short or long-term vacancies and support your team through temporary leaves or turnover in key system-related positions.

▶ Promptly resolve specific efficiency issues by strategically identifying opportunities for improvement.

Advanced Consulting

Looking to develop and execute an ECM strategy that supports every objective you've set for your **Etrieve** deployment? The Softdocs Managed Services team is here to help with advanced consulting. A major component of every Managed Services agreement, advanced consulting provides you with the opportunity to complement the ongoing efforts of your team with the expertise and extensive experience of the Softdocs Managed Services team, who–each day–help institutions receive maximum value from their Softdocs solutions.

Dependent on the level of service you select, your Managed Services agreement will include a number of advanced consulting hours that can be used in any of the following ways:

- ▶ Strategic Planning–Collaborate with Softdocs in an ongoing fashion to ensure success with properly timed upgrades, expansion, training, system optimization projects and more.

- ▶ Process Discovery and Design–Softdocs will assist with process discovery and design to ensure best practice methodology and a smooth path to adoption.

- ▶ Test System Upgrades–All test system upgrades can be planned and performed by Softdocs to ensure successful rollout.

- ▶ Training–Keep system administrators and end users up to date on new processes and functionality with ongoing training from Softdocs.

- ▶ Custom Report Building–Softdocs will conduct discovery of parameters for needed reports before building custom reports to your specifications.

- ▶ Custom Form Development–Softdocs will assist in the development of custom forms, from the simplest to the most complex.

- ▶ Configuration and Testing Assistance–Supplement your staff's efforts with new feature and expansion configuration and testing assistance, provided by Softdocs' Etrieve system experts.

After-Hours Production System Upgrades

Keep your system up to date with the latest **Etrieve** releases through after-hours production system upgrades. Let Softdocs perform the production system upgrades you need to further your ability to improve your business processes and continue to utilize **Etrieve** effectively, at times convenient for you.

Managed Services Agreements

	PREMIUM	ADVANCED	STANDARD
ADVANCED CONSULTING	Up to **24** hours per quarter AND up to **50** additional hours per calendar year	Up to **18** hours per quarter AND up to **40** additional hours per calendar year	Up to **12** hours per quarter AND up to **24** additional hours per calendar year
SYSTEM UPGRADES	Up to **4** per calendar year	Up to **2** per calendar year	

NOTE Additional advanced consulting hours are available for purchase at a discounted rate.

Softdocs