



Welcome Guide

Your Road Map to Naviant Resources



Naviant Welcome Guide

Contents

Welcome Letter From CEO	3
Naviant Support.....	4
Quick Links.....	4
Naviant Customer Success Advisor (CSA)	4
Naviant Managed Services.....	4
Marketing Communications.....	5
Free Information Resources	5
Naviant.....	5
Hyland Software	6
ABBYY Software	6
Invoice Cloud	6
Annual Events	7
Naviant Summit.....	7
CommunityLIVE.....	7
Hyland TechQuest.....	7
ABBYY Reimagine Conference	7
Software Training Resources	8
Hyland Certified Training Courses	8
Hyland Premium Subscription.....	8
Refresher Training Led by Naviant.....	8
Customer Engagement Opportunities.....	8
Customer Briefing	8
Cloud Readiness Workshop	8

Welcome Letter From CEO

Dear Valued Customer,

I am pleased to extend a warm welcome to you on behalf of the entire Naviant team. We are thrilled to have you join our community of OnBase and ABBYY users, and we look forward to partnering with you on your intelligent automation journey.

As Naviant's President & CEO, I take immense pride in our work and the services we offer our customers. Our mission is your success. We are driven by an obsession to help our customers succeed in their intelligent automation journey. For the last 35+ years, we have helped our customers transform the way they work using technology and provided exceptional support that exceeds expectations at every turn.

This document is designed to be a resource to guide you on your intelligent automation journey. Within its pages, you'll find resources that will help expand your knowledge, keep up with the latest technologies, and understand the ways we can help support your efforts. I invite you to use this document as a tool as you grow your solution and expand your organization's opportunities.

As a Naviant customer, you will have access to our Customer Success Team. This group of highly trained software experts will be available 24/7 to answer your questions and ensure that your software is working to its full potential. We will also assign you a Customer Success Advisor (CSA), your primary point of contact at Naviant. Your CSA will work closely with you to identify opportunities for solution improvement and other initiatives that support your evolving goals. I encourage you to engage with your CSA anytime with your ideas and questions.

Once again, welcome to Naviant. Feel free to contact me or Greg Albert, our Sr. VP of Operations, if you have any questions. We are excited to get to know you and look forward to a long and successful partnership.

Sincerely,

Michael Carr
President & CEO, Naviant



Quick Links

Phone Support

800.686.8789

Email Support

support@naviant.com

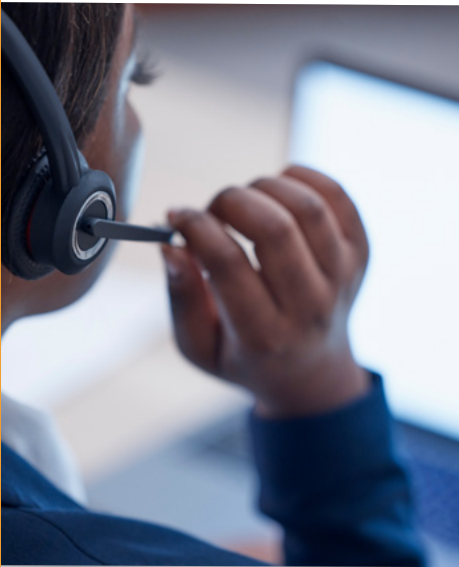
[Customer Portal](#)

[Online Chat Support](#)

(bottom right)

[Naviant Support Website](#)

[Naviant Annual Support Audit](#)



Naviant Support

To contact Naviant Support, you can submit an issue via:

- + Our [online portal](#)
- + Email: support@naviant.com
- + Online Chat: available during business hours at naviant.com/customer-support
- + Our 24/7 Emergency Phone Line: 800.686.8789

When you contact Naviant Support, be prepared to provide the following:

- + Company Name
- + Person Reporting the Issue
- + Contact Person for the Issue
- + Direct Phone Number
- + Summary of the issue with examples and environment (i.e., Users are receiving an error when completing this action in our production environment. Attached are screenshots of the error.)

As an OnBase Diamond Award Support Provider, Naviant has achieved the highest recognition from Hyland Software for providing superior technical support to customers.

[Naviant Annual Support Audit](#)

Naviant's OnBase Performance Audit provides customers a detailed system audit from a Certified OnBase Resource. The Audit analyzes and documents the current technical state of your system regarding efficiency/areas of improvement and provides recommendations to ensure the future health of your system. This audit is completed by one of our experts and takes 40-60 hours, depending on the size and scope of your solution.

Naviant Customer Success Advisor (CSA)

You will be assigned a CSA who is dedicated to your organization's success. Your CSA will keep you informed of the latest updates from Naviant, be a resource for any questions, and help with ensuring you are getting the most out of your partnership with Naviant. You can reach out to your CSA at any time if there is something Naviant can help improve.

Naviant Managed Services

Naviant's Managed Service offering is an additional service beyond our SLA support (here's the [difference between an SLA and Managed Services](#)). With Naviant Managed Services, you can offload the day-to-day maintenance of your software solution to our team of experts. We will proactively monitor your system and ensure it performs optimally. Then, you can focus on your organization's goals without having the distraction of maintenance, monitoring, and upgrades.

If you want to learn more about [Naviant's IT Managed Service](#) offering, contact your account manager or email support@naviant.com.

Marketing Communications

Ensure the right team members receive timely updates from Naviant, like technical bulletins, webinar invites, and other free educational opportunities. Contact Naviant's Marketing Team at marketing@naviant.com to confirm which team members should receive marketing email communications. Marketing will work with you to set email preferences, and you can decide how often and what type of content you want your team to receive.

You can always manage your preferences at the bottom of every marketing email. Here are your subscription options:

- ✦ **Receive All Communications from Naviant** – You're a go-getter and don't want to miss a beat!
- ✦ **Naviant Blog Update** – Receive a weekly email with a link to our latest blog post.
- ✦ **Customer Newsletter** – Monthly newsletter featuring upcoming Naviant events, industry news, and product updates.
- ✦ **Webinars, Events & Training** – Invitations to webinars, events, and product training or certifications available.
- ✦ **Product & Service Updates** – Periodic announcements, updates, and news about products you use.
- ✦ **Naviant Summit** – Receive information about our free annual two-day event, where we explore ways to improve your business processes further.
- ✦ **One to One** – Receive personalized emails from the marketing team that are not part of mass communication.

Free Information Resources

Naviant

[Naviant Blog](#)

Our blog is filled with articles on departmental solutions, advice on process improvement, OnBase tips and common fixes, and updates on OnBase and other solutions. You can subscribe to the weekly blog update email [here](#).

[Naviant Resource Library](#)

Did you miss a recent webinar? You can watch the recording posted in our online Resource Library. Also, explore other valuable resources such as solution summaries, whitepapers, case studies, and videos.

[Naviant Webinars & Events](#)

Our team hosts monthly webinars on a variety of topics and best practices. We'll email you about upcoming events, but you can also see what topics are coming up on our Naviant Events Calendar on our website.



Connect with us

If you prefer updates bit-by-bit, we recommend you follow us on your preferred social media platform.

Naviant Social

- + [Facebook](#)
- + [LinkedIn](#)
- + [Twitter](#)
- + [YouTube](#)

Hyland Social

- + [Blog](#)
- + [Facebook](#)
- + [Instagram](#)
- + [LinkedIn](#)
- + [Twitter](#)
- + [YouTube](#)

ABBYY Social

- + [Blog](#)
- + [Facebook](#)
- + [Instagram](#)
- + [LinkedIn](#)
- + [Twitter](#)
- + [YouTube](#)

InvoiceCloud Social

- + [Facebook](#)
- + [LinkedIn](#)
- + [Twitter](#)

[Naviant Question Corners](#)

In our original video series, the Question Corner (QC) answers frequently asked questions about OnBase with short demos led by our support team. We publish new videos on the second and fourth Friday of the month. You can also [submit a question](#) you have to be featured on a future episode of the QC.

Hyland Software

[Hyland Community Website](#)

Hyland has an online user community where you can find information and answers to most questions, including current basis licensing information, all modules, versions, and maintenance coverage periods. You can create a login by visiting the Community website and clicking "Register Now."

[Try Hyland](#)

Try.Hyland.com provides an opportunity to try out more than 50 preconfigured solutions accessible via the Web or Unity Client in a risk-free environment. Become familiar with OnBase and all it can offer through the new Hyland Exchange.

[Hyland University](#)

Hyland offers self-paced and instructor-led courses online. You can access these by visiting [university.hyland.com](#) and exploring eLearning modules. You will use the same login as your Hyland Community account.

ABBYY Software

[ABBYY University](#)

ABBYY offers self-paced and instructor-led courses online. You can take individual courses or focus on a specific certification track.

[ABBYY Marketplace](#)

The ABBYY Marketplace provides a rich collection of document skills, connectors and assets, which enhance and extend the ABBYY Vantage platform and accelerate the digital transformation and automation initiatives of enterprises of any size, industry and geography.

[ABBYY Help Center](#)

ABBYY has an online user community where you can find information and answers to questions and learn more about the product offerings.

InvoiceCloud

[InvoiceCloud Resources](#)

InvoiceCloud has an online community where you can find information and answers to questions and learn more about product offerings.



Annual Events

[Naviant Summit](#)

This free event each May is for customers and invited prospects, from the newest users to the seasoned executive. We focus on customer case studies, breakout sessions, industry roundtable discussions, hands-on training opportunities, an executive forum, and plenty of networking. The Naviant Summit is all about coming together to share ideas and find inspiration to improve the effectiveness and efficiency of your organization.

[CommunityLIVE](#)

Hyland's OnBase CommunityLIVE is a 3–5-day educational event designed to stretch your imagination to the limits. This annual event in early fall brings together 2,000+ OnBase end users, developers, executives, and experts from industries all around the world. More than just a user conference, CommunityLIVE is the one place to go to learn how every department in your organization can work better, smarter, and faster.

- ✦ Network with peers in similar industries and departments
- ✦ Learn how other customers optimize their business processes
- ✦ Get hands-on experience with the latest innovations
- ✦ Connect with Hyland executives, experts, and developers
- ✦ Attend targeted sessions and training classes for all levels of OnBase

[Hyland TechQuest](#)

TechQuest helps Hyland professionals take their solutions to the next level with hands-on focused training from Hyland experts. Hyland's TechQuest is a week-long technical training conference. This event provides OnBase professionals with an in-depth experience of the latest OnBase features and functionality. Learn and be inspired by the more than 70 sessions led by OnBase engineers and trainers. Get help from OnBase experts through an extensive set of hands-on labs, and connect with OnBase users from around the world, allowing you to understand and grow the best solutions possible.

[ABBYY Reimagine Conference](#)

The Reimagine conference challenges your conventional understanding of intelligent automation and offers new strategies to take your business to the next level. The event is typically held virtually in the spring. The two-day event features industry experts, customer stories, and a reveal of the company's latest innovations designed to revolutionize how artificial intelligence (AI) skills can be quickly democratized throughout the enterprise and in the hands of every knowledge worker to achieve greater business success.

Attendees ranging from executives leading enterprise centers of excellence, managers leading departmental transformation, consultancy groups, VARs and solution integrators, and citizen developers can choose from over 30 sessions designed to help them understand the impact of documents and processes on their overall operational excellence and increase knowledge workers' productivity by leveraging the latest AI technologies.

Software Training Resources

[Hyland Certified Training Courses](#)

Once you officially purchase Hyland software, you can access Hyland's Training Site, university.hyland.com, which will show you the full availability and location of all courses Hyland offers and complete course descriptions. To log in to Hyland's Training Site, use your Hyland Community username and password.

[Hyland Premium Subscription](#)

Premium Subscription is a fee-based subscription resource with over 200 hours of OnBase professional development tools and training on-demand. These videos offer both introductory and high-level training information. To receive special pricing for your organization, please contact support@naviant.com.

[ABBYY Product Training & Certifications](#)

You have access to a variety of ABBYY University technical courses based on the ABBYY product portfolio. Courses focus on commonly used project types and frequently occurring use cases. Courses combine detailed theoretical background information with hands-on tasks designed to give you the skills needed to successfully work with ABBYY products.

[Refresher Training Led by Naviant](#)

Naviant can work with your organization to conduct refresher training. Whether we want to run a refresher training course for power users, end users, or system admins, the Naviant team can help provide this training at your organization.

Custom Engagement Opportunities

[Customer Executive Briefing](#)

Recommended: Quarterly, Semi-Annually, or Annually

Naviant and software vendor led sync to discuss the current snapshot of your account, including – active projects, current system updates, roadmap discussion, customer inclusion of requested topics, upcoming training, events, and more. Based on the pre-confirmed agenda, additional attendees from Naviant and software vendor would attend for the best touchpoint. Not a sales pitch, but rather a client sync that illuminates what is happening at the account and how we can continue or change to best meet their needs. Contact your Account Executive or Naviant Support for more details.

[Cloud Readiness Workshop](#)

Naviant and Hyland account teams and solution engineers outline your migration to the Hyland Cloud. This includes a timeline of events on where you are in your current environment and builds an onramp timeline to move you over. We include a baseline ROI assessment with the ability for follow-up and provide a functionality review to ensure integrations and functionality are maintained or increased with the migration. Contact your Account Executive or Naviant Support for more details.



Corporate Headquarters

201 Prairie Heights Drive
Verona, WI 53593