

Intuitive for PaperCut MF Playbook

Author	Version	Date	Changes
James Bray	1.0	30 th January 2024	First Document
James Bray	1.1	10 th April 2024	Updated Implementation ordering
James Bray	1.2	30 th April 2024	Added cell shading to optional requirements

Introduction

This document provides a step-by-step guide with checklists to proposing, ordering and implementing Intuitive for PaperCut MF.

This document follows the RACI methodology of **R**esponsible, **A**ccountable, **C**onsultable and **I**nformed.

Cells highlighted in gray are optional requirements, pending formal customer scope.

Proposal Phase

1. Pre-requisite
 - a. Ensure that customer is on or will be upgraded to 20.1.0 of PaperCut MF prior to agreement.

2. Services included / rendered
 - a. The following resources are included in the Intuitive Portal. Access can be requested by sending an email to softwaresupport@acd-inc.com
 - i. Intuitive online demo
 - ii. Demo Script
 - iii. PowerPoint presentation
 - iv. Product Overview
 - v. Access to Value Proposition
 - vi. Intuitive Customer Subscription commercial terms and data processing agreement terms
 - vii. Intuitive Design document
 - b. Access to Intuitive pricing

	Task Sequence	Description	AM	PRS	PMO	DC	C	S	I
Proposal	1	Demonstration of Intuitive Dashboards to customer	A			R			
	2	Completion of "Pre - Sales" section of Design Document to determine implementation estimate and scope	A			R			C
	3	Produce cost estimate for licenses and services	R						

Abbreviation	Title
AM	Account Manager
C	Customer
DC	Design Consultant
I	Intuitive
S	Support
PRS	Print Related Solutions
PMO	Project Management

Order Phase

1. Pre-requisite

- a. Design document filled out up to and including “Pre- Sales” and “Quotation” sections.

	Task Sequence	Description	AM	PRS	PMO	DC	C	S	I
Order	1.	Submit license PO to Intuitive	R						A
	2.	Submit services PO to Intuitive, if required.	R						A
	3.	Order acknowledgement and invoice				A	I		R

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Implementation Phase

1. Pre-requisites

- a. Customer license details from PO
- b. Customer Checklist to be updated with pre-implementation information.

2. Services included / rendered

- a. Installation of Intuitive software
- b. Application of Intuitive DX dashboards
- c. Data import from PaperCut to Intuitive
- d. Configuration of customer branding
- e. End-user training, based on customer user types.
- f. Intuitive support as per standard SLA's

	Task Sequence	Description	AM	PRS	PMO	DC	C	S	I	
Implementation	1.	Customer Checklist to be updated with Implementation information.				R	A		C	
	2.	Acknowledge Customer Checklist		R		A	I		C	
	3.	Issue of Intuitive license		A					R	
	4.	Installation of Intuitive for PaperCut MF		R		C			C	
	5.	Import Intuitive DX dashboards + assets		R					C	
	6.	Export of data from PaperCut		R			A		C	
	7.	Start "Intuitive Dashboard ETL Service"		R					C	
	8.	Check logfiles for successful data import		R					C	
	9.	Application of Intuitive license		R					C	
	10.	Creation of URL to Intuitive Dashboards		R		C			C	
	11.	Apply customer branding (banner and logo), if required.		R		C			C	
	12.	Start "Intuitive Dashboard Service"		R					C	
	13.	Login to Intuitive and change default admin password		R					C	
	14.	Testing of data flow from PaperCut to Intuitive. Tested by opening the following dashboards: <ul style="list-style-type: none"> • User Profile • Executive Summary • Volume Analysis 		R					C	
	15.	Data quality testing. Ensuring that Departmental data, device Serial Numbers and Costs are present in the solution.		R						C
	16.	Creation of Partner and Intuitive Support account(s).		R						C

17.	Secure delivery and storage of Partner access credentials / access methods		R				A / I	
18.	Secure delivery and storage of Intuitive access credentials / access methods		R			I	R / A	I
19.	Creation of requested user accounts		R					C
20.	Testing of security filters, if required.		R					C
21.	Dashboard customisation, if required.		R					C
22.	Secure delivery of customer access credentials / access methods		R					C
23.	Removal of partner access, if required.		A / C			R	I	
24.	Delivery of end-user training, if required.	A				I		R
25.	Delivery of User Administration training, if required.	A				I		R
26.	Delivery of System Designer training, if required.	A				I		R
27.	Handover to reseller Support, if required.		R				A	
28.	Arrange for Intuitive Customer Success workshop (3 months wait for new installs, immediate for existing customers)	R			I			I

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Customer Success Phase

3. Pre-requisites
 - a. Intuitive dashboards to be fully configured with users
 - b. Intuitive dashboards to have at least 3 months of data
4. Services included / rendered
 - a. Intuitive support as per standard SLA's

	Task Sequence	Description	AM	PRS	PMO	DC	C	S	I
Customer Success	1.	Intuitive health check and investigation							R
	2.	Intuitive Customer Success workshop	I			I			R
	3.	Creation of list of recommendations / areas for process improvement				C			R
	4.	Handover to partner accounts team	A						R
	5.	Follow up and arrange future workshop, if required.	R			C			C

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