FLEXiSoftware

Flexi Consulting Services & Training

Flexi offers a full line of services including consulting on accounting process improvements, best practices, data conversions, integration methodologies, implementation and training. These services are tailored to meet the requirements of each customer and to assure the service was provided as promised, on-time and on-budget. The goal is to accomplish the engagement in the most efficient manner, provide the level of service to complement an organization's resources, help organizations become self sufficient and streamline as many processes as possible.

Planning and setting the correct expectations are key to a successful implementation. This includes evaluating the availability of resources, impending events, deadlines and setting realistic time frames. Flexi has developed an implementation methodology that assures the highest degree of success for large to smaller projects. We continue to prove it again and again!

You may ask, "Why have a Methodology?"

Methodologies are guidelines or sets of procedures that provide precise deliverables at the end of a phase. By defining each phase and the expected deliverable, all parties will have the correct understanding and expectation as to what should be accomplished at each phase and what will be delivered. Additionally, methodologies provide you with proven, repeatable processes to assure the highest level of success.

Over a decade ago, Flexi developed its own implementation methodology, RAPID. This methodology has allowed Flexi to provide a greater depth of services with consistency and obtain a greater knowledge of the requirements. The focus of the effort is to deliver the desired results that simultaneously improve processes and increase efficiencies.

RAPID Methodology

The RAPID—**R**equirements, **A**nalysis, **P**rototype, **I**mplementation, **D**eployment—implementation is designed around phases in a project and within each phase we explain the goal of the phase and deliverable.

Requirements – What are we trying to accomplish?
The FlexiFinancials Implementation begins with a kick-off meeting to discuss business needs around the applications being implemented; where improvements are needed; assess the overall project requirements and define the project. Then a discovery meeting is scheduled to understand technical environment, details of required integration, and transition strategies. Based on finding during the requirements phase an implementation Statement of Work is finalized and presented to the client.

Analysis – What do we need to do to get there?
Flexi reviews the information gathered in the requirements phase and documents the implementation approach. It includes an operations review; review of integration and interfaces; determining if any enhancements or modifications are required; and assess the data conversion strategy.

Prototype – What will it look like?
The first two steps enable Flexi to configure the applications and build a custom prototype which is presented to a client. The prototype pulls together all information gathered from discussions and allows Flexi to perform a proof of concept. The goal is to ensure the model fits the client's needs.

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Implementation – Make it happen.
Once the prototype is approved, the next step is to move into operational application setup in a test environment. Historical data is imported, interfaces are implemented, integrations are built, cut-over planning is discussed; adjunct products are plugged in; reports are built; support processes are defined; training is conducted and user acceptance testing is performed.

Deployment – Put it to work.
The last step is to finalize the remaining items to complete the implementation – implement operations procedures; implement support procedures; cut over to production; and post production follow-up.

Training
Formal training sessions are conducted to ensure that your team has the skills to effectively use our applications. Flexi offers various training programs that are typically conducted onsite but can easily be scheduled off-site, if desired. Flexi gears its training classes towards the audience attending the classes whether it is technical users, end users or the internal trainer. Training is split into three basic categories: Application, Reporting, and Technical Concepts.

Application and Reporting Training
- FlexiControl™/FlexiLedger Lite
- FlexiLedger®
- FlexiPayables®
- FlexiReceivables®
- FlexiPurchasing®
- FlexiProjects®
- FlexiAssets®
- FlexiWorkFlow
- Renovofyi
- Designing Reports in Crystal Reports

Flexi Technical Concepts Training
- Application Deployment
- Application Security and Administration
- Deferred Processing
- Integration Basics
- Web Services or COM+ Integration
- Archiving Techniques
- Debug Log Basics
- Flexi Files and DB Objects Naming
- Upgrade Basics and the Migration Path
- Tables and Processes

Environment Evaluation
Flexi can assist you with the development of your backup schedules and disaster recovery programs, nightly maintenance and overall system setup.

Integration
Integrations are often the largest risk factor in a software deployment. Flexi has developed a nine step approach to systematically approach integration challenges and minimize such risk. As part of integration development Flexi provides supporting documents to guide a client through the design and development of integration that can be performed by the client's IT team or by Flexi. Flexi recommends real-time integrations using SOA components but also provides interfaces for a batch feed using a file import or export processing.

Support
Flexi Consulting will guide you through the entire implementation and jointly manage the project along with your respective project manager. Once you are in production and the system is live, the Flexi Hotline/Support will be available to support your needs. The team is made up of Flexi software experts who have strong technical and accounting skills.

About Flexi Software
Founded in 1991, Flexi develops, markets, and supports FlexiFinancials, workflow-driven enterprise accounting solutions for companies in select industries including Banking, Insurance, and Financial Services. Flexi distributes its products directly and through strategic partnership agreements. Through many successful deployments Flexi has a proven track record of low cost of ownership, ease of use and improved business processes.

www.flexi.com