

# 2019

INNOVATION • QUALITY • STABILITY

**SOUTHLAKE, TEXAS**  
**OCTOBER 13-15**



OMNI-CHANNEL  
EXPERIENCE



MACHINE  
LEARNING



BUSINESS CASE  
MANAGEMENT



INBOUND MAIL  
AUTOMATION



BUSINESS DOC  
DESIGN & DELIVERY

# Open House & User Conference

PAPYRUS SOFTWARE

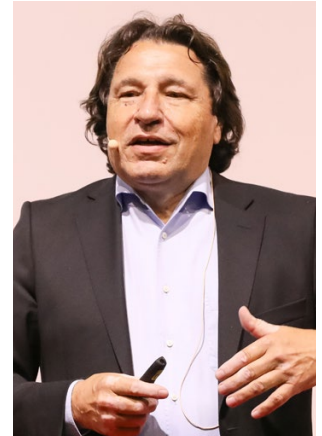
PAPYRUS  
SOFTWARE



Ladies and Gentlemen!

I would like to formally invite you to attend our annual Open House and User Conference on Oct. 13-15 in Southlake, TX.

This event gives you the opportunity to engage face-to-face with your peers, hear exciting presentations, and see breakthrough product showcases. We are also excited to present you with live demos and new product solutions. In addition to the suddenly popular machine learning functionalities, which we have had in our software since 2009, a primary discussion topic in 2018 focuses on the opportunities of Digital Transformation (DT).



Content creation and content capture are key functionalities of Digitalization in an Omni Channel world and a component of DT. Beginning with images, the need for Digital Transformation leads to voice and finally video. The final step is to embed these capabilities in an application environment that supports goal-oriented processes between a business, its partners and customers.

The business world has yet to adopt much of these capabilities, and only one third of businesses have Digital Transformation projects in plan. The immense complexity and requirements around compliance and data security make Digital Transformation a difficult task. These barriers are the primary targets for our new product Papyrus Converse, along with its simplicity in creating business-driven digital experiences while using business language and natural language rules to make compliance a natural part of the Digital Transformation.

We look forward to seeing you at the Open House and User Conference!

**Annemarie Pucher**  
CEO, ISIS Papyrus

**Max Pucher**  
CTO, ISIS Papyrus

Conference Agenda	Sunday, Oct. 13	Monday, Oct. 14	Tuesday, Oct. 15
<b>Golf Tournament</b>	13.00		
<b>Opening Event</b>	19.00		
<b>Conference Sessions</b>		9.00 - 15.30	9.00 - 13.00
<b>Management Circle Seminar</b>		16.00 - 18.00	14.00 - 16.00
<b>Workshops</b>		14.00 - 18.00	14.00 - 16.00
<b>Solution Showcase</b>		9.00 - 18.00	9.00 - 18.00
<b>Analyst Report/Case Study</b>		14.00 - 14.30	12.30 - 13.00
<b>Brainstorming Session</b>		18.00 - 19.00	

# HOT TOPICS AT THE 2019 OPEN HOUSE & USER CONFERENCE

## Digital Business Transformation

Digital business transformation is a key initiative for many organizations. With a well-defined plan, agility and a powerful digital software platform with support for RPA and AI, organizations can introduce a new business model that offers Omni-channel engagement, enhanced customer experience (CX) and streamlined operations. The Papyrus digital platform innovation is addressing true digital transformation of the entire business operations, irreversibly changing the way how companies interact with clients and employees to run the business more productively, efficiently and profitably.

## Omni-channel Business Engagement

Customers use today three or more channels when contacting companies. This requires a new communication model that will go beyond disconnected channels to offer seamless Omni-channel engagement across channels with a real-time back-office integration for quality of service and enhanced customer experience. The consistency of conversation is ensured through all communication linked to a customer case across the entire customer journey.

## Machine Learning empowered by AI

Training machines to recognize documents and messages while continuously optimizing information capture is a remarkable technology that can immensely increase efficiency. But what really improves business capability is a process solution that learns over time what your knowledge workers do when processing a case – when a certain document arrives, a particular state is recognized or when an exception is encountered.

## Multi-Channel Inbound Mail Data Capture

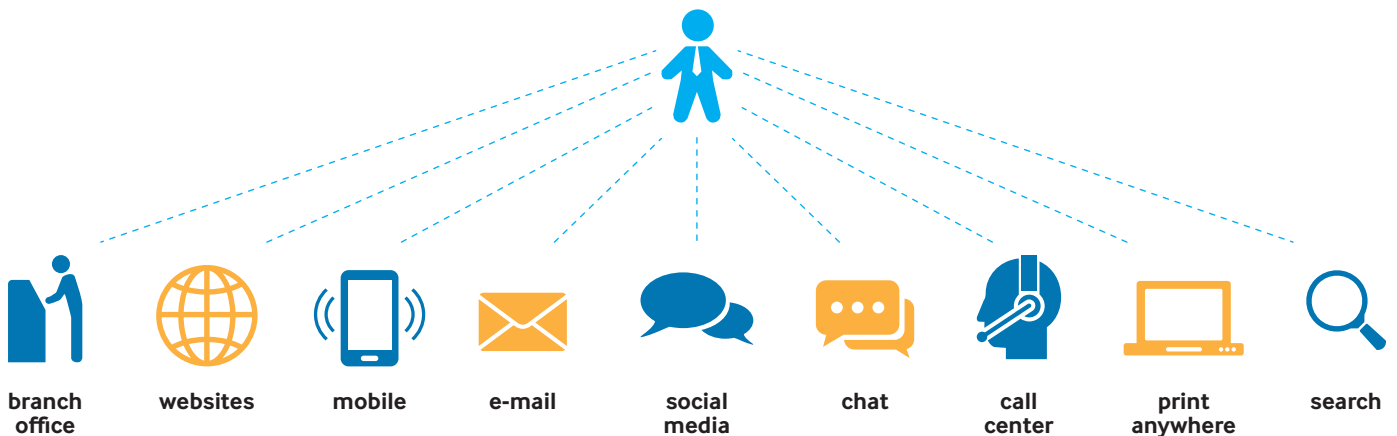
Digitizing and intelligently extracting data from incoming e-mails, PDFs, scans, fax and messages in structured and unstructured formats, including handwritten information is a key strength of Papyrus Capture. The state-of-the-art, self-learning classification process and machine learning utilize pattern recognition to increase accuracy and efficiency of data capture.

## Single-Source Document Design Across Physical & Digital

Smart document design by business teams and IT leveraging the holistic “One platform approach” allows companies to set new standards in communication with their clients and achieve significant gains in efficiency and business agility. Document layouts and building blocks are created only once and re-used across document applications and across templates for delivery via e-mail/HTML, Mobile, Web, PDF and AFP print – achieving efficiency, CI/CD, precision and quality. Integrated versioning, change and release management allow business teams to sign-off and deploy document changes at any point in time without waiting for a next general release.

## Robotic Process Automation (RPA)

Process flow diagrams for the Customer Journey are often too rigid for the modern business world. The Papyrus key innovation - ‘User Trained Agent’ (UTA) – takes a different approach and utilizes machine learning to empower business users with interactive process discovery and pattern recognition capabilities, supporting each customer individually. Papyrus can capture and classify any incoming document and message, automatically trigger the process/case, assign goals based on rules and suggest a rated ‘best next action’.



## Business Solutions for Mobile

Papyrus applications can run as native applications on all leading mobile devices in support of Enterprise Mobility. Users are able to communicate, take actions, track events, send requests and receive notifications with a direct back-office connectivity and smooth interactions with existing CRM, BPM, ERP and database systems even when out of the office.

## Preferred Channel Delivery / Output Management

Communication is delivered to each individual in their preferred language and channels of communication - Web, e-mail, Chat, SMS, Social, Mobile or paper, with a transformation to the specific channel only at delivery time for utmost channel independence. Tracking, tracing and monitoring of all jobs, starting with receiving the data and completing with archiving of documents with a feedback loop and notifications are key capabilities.

## Reporting and Monitoring Across Channels

All channels are presented in a unified view to understand which communication has taken place via which channels (inbound & outbound), even when crossing channels in parallel conversations. Monitoring and reporting tools provide evidence that communications get delivered in a timely manner and help identify problems at the earliest point in a conversation.

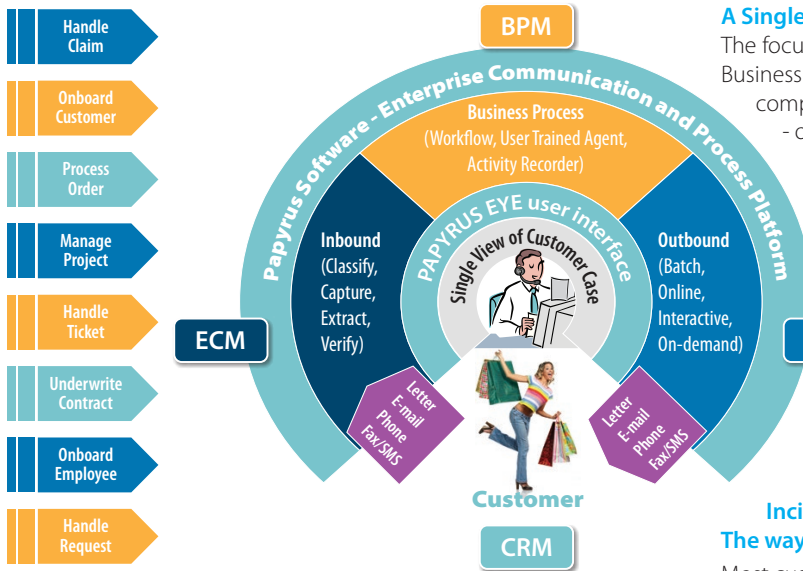
## Online Channel Business Correspondence

Doing business online is of critical importance for your organization's existence and connects you fast and conveniently to customers, prospects and partners. Online channel services can be fully managed by business teams and offered via Wizard-assisted Webforms for customer self-service through your Website or mobile app directly linked to your back office for operational support.



# A NEW WAY OF WORKING – ADAPTIVE CASE MANAGEMENT

**Adaptive Case Management** puts people at the center of a process and allows them to intervene and apply their judgment and expertise to adapt to concrete business situations and create exactly what they need, when they need it to achieve the best possible outcomes. In ACM, business users can DESIGN while they EXECUTE.



## A Single View of All Customer Activity

The focus lies on Digital Transformation, Customer Experience (CX) and Business Empowerment with a 360° view of the customer – positioning companies to interact with customers and partners as ‘one company – one voice’.

## Make Enterprise Content Available to the Fingertips of Knowledge Workers

Easy access to all documents and content plays a key role in boosting productivity of knowledge workers in sales and customer service. Organizations need to bridge the silos and provide intelligent content services with unified content and processes within a business context to employees across enterprise teams – from anywhere to anywhere – to effectively connect, collaborate, up-sell, cross-sell and work on one single version of truth.

## Incident Management / Ticketing – The way to Customer Engagement Excellence

Most customer service solutions cannot keep up with today’s customer engagement requirements, as customers want to experience fast response to their inquiries or reported issues using preferred channel of communication. Papyrus Ticketing serves as a new system of engagement across a number of departments, helping companies increase employee productivity and deliver top-notch service for enhanced customer satisfaction.

## Facilitated Integration With Existing Applications And Devices

Learn about SOA Adapters with support for a wide range of protocols:

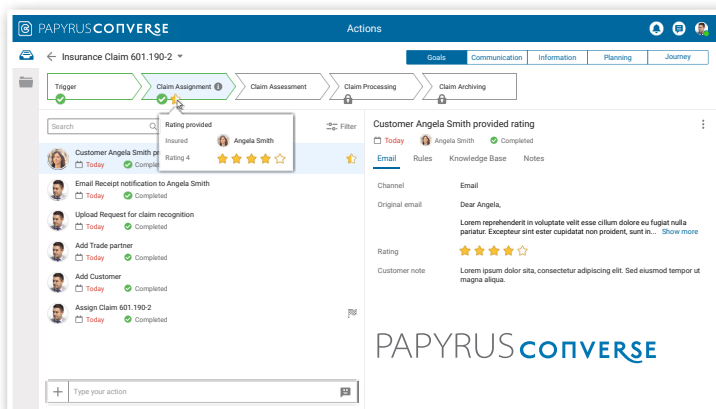
- Online channels/portals - Web Services, SOAP, HTTPS
- E-mail/Notifications – SMTP, POP3, MAPI, IMAP, SMS
- Mainframe - JES 2/3 & CICS, MQ
- Databases - Oracle, DB2, MS-SQL, ODBC
- Business Application integration - SAP, Social, Mobile-REST
- Java, .Net, MQ-Series, FILE, XML, FAX, VOIP, SNMP, LDAP, CMIS

## Building Value Streams: Get Your Ideas To Execution Faster

Organizations have a huge backlog in delivering digital business solutions – IT does not have the resources; professional services are associated with huge costs, and lengthy project implementations often lead to further shortage of IT staff and prevent modernization. Organizations thus need a new innovative approach that empowers the Business to model their ‘value streams’ with detailed processes and rules.

## Campaign Management / Targeted Messaging

The Papyrus collaboration platform for campaign management earned the highest honors for digital transformation excellence, agility and high value creation. With help of the Out-of-the-Box ACM Framework, customer’s Creative Services Teams are driving creation, modification and administration of a large number of marketing and regulated materials with more than 60 media types in nearly 30 languages, with efficient approval cycles that grant quality and compliance in a highly regulated business area.



Compliance  
Guidance  
Adaptivity  
Transparency



Validate Claim

Investigate Claim

Settle Claim

Pay Claim

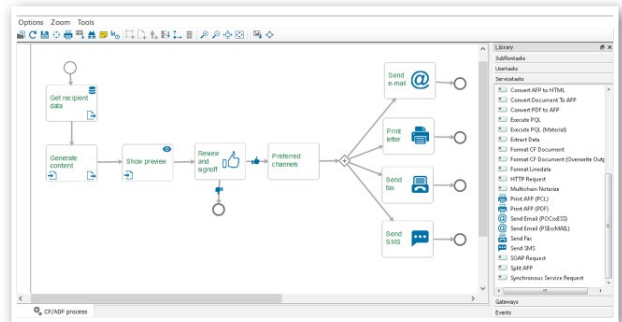
Close Claim

# SOLUTIONS CENTER - THE HEART OF THE OPEN HOUSE

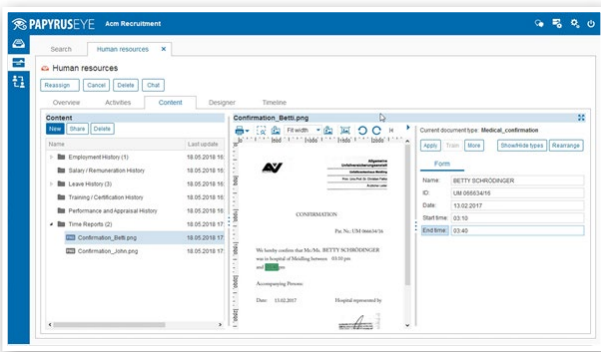
Inbound Mail Data Capture Freeform and Handwriting



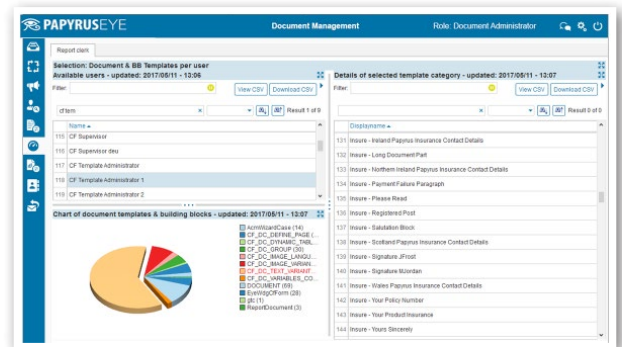
Output Management Process Definition



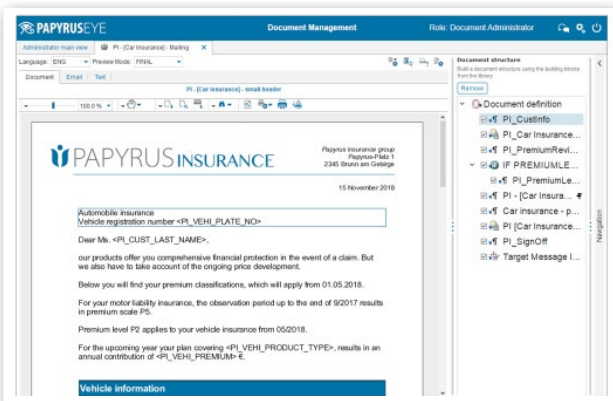
User Trains Machine



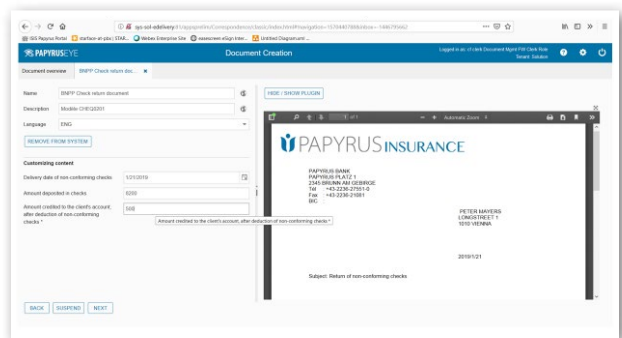
Papyrus Monitoring and Reporting



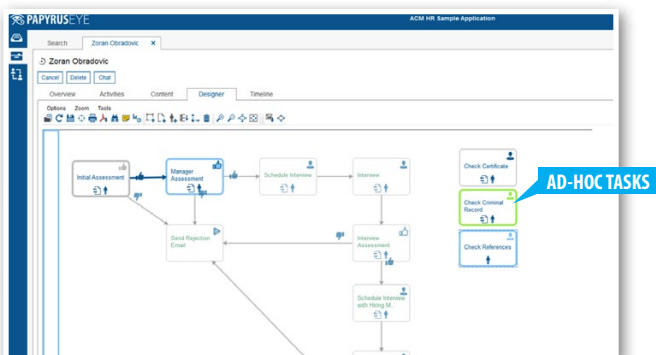
Document Design with Business Designer



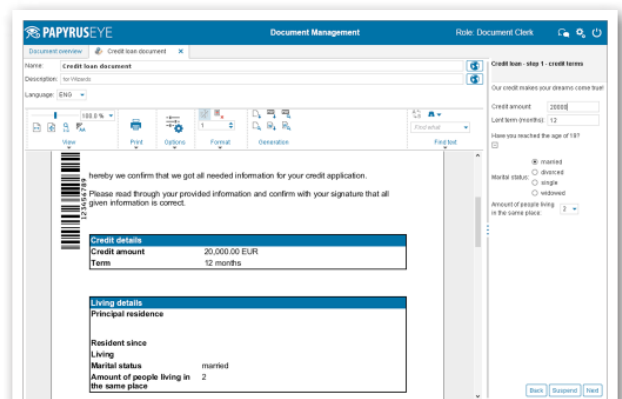
Web Business Correspondence



Unforeseen Events and Ad Hoc Tasks



Wizard-Driven Interactive Documents



# MONDAY, OCTOBER 14

## 8.30 Welcome with Coffee

### 9.00 Keynote: The Push and Shove of Digital Speaker: Max J. Pucher – CTO Papyrus Software

Continuous change shapes our information technology world. It is no longer driven from inside a business but instead pushed and shoved by consumers and governments. That push comes from the progress in technology and the shove from a change in the business environment and governments. You are faced with the fact that the demands on security and privacy, a switch to mobile technology, augmentation of human skills and continuous availability in time and space have exploded. It has become of utmost importance to employ a strategy that will give the business both the necessary stability and security in their transaction processing and record keeping while providing a substantial upgrade in flexibility and adaptability in user and customer interaction.

### 10.00 Omni-Channel Customer Experience Speaker: Annemarie Pucher – CEO Papyrus Software

Excellence in Omni-channel support is the ultimate goal in achieving an outstanding customer experience.

- Engaging with both traditional and digital clients on one digital platform
- Striving to move beyond disconnected multi-channel communications (inbound/outbound)
- Allowing for real-time messaging and integration with existing applications

## 10.30 Networking coffee break

### 11.00 Unified document design by Business teams for physical and digital channels

A strategy for designing documents for print and digital, achieving a 'One Company - One Voice' customer communication.

- Best practices for creating highly personalized and consistent cross-channel business documents
- Single unified design for print, PDF and HTML reusing content building blocks across formats
- Inclusion of videos, graphics, charts, personalized messages and promotions
- Business teams create, extend and maintain templates and rules with the Business Designer
- Integrated versioning, Change and Release Management
- Migration from MS Word and other PC document formats

### 11.30 Preferred channel delivery with feedback loop

Powerful Postprocessing capabilities and the Automated Document Factory help you to move beyond disconnected multi-channel communications and lets you control your print and e-delivery operations.

- Best practices transforming from paper to digital
- Collect output in the Pool, bundle and augment each page with channel-specific information
- HTML5/PDF/SMS/e-mail/Mobile, printing considerations and available solutions
- Monitoring and reporting across e-mail, WebPortal, printing and archiving

### 12.00 Campaign Management with Targeted Messaging

Creative business teams plan a campaign that stretch across multiple channels. They create the marketing content as text, image or video building blocks and define rules for including such content into highly personalized data-driven business correspondence per e-mail and paper.

- Creating personalized marketing messages
- Integration with data and definition of rules for the Campaign
- Delivery management (e-mail, SMS, portal, Mobile, paper)
- Tracking, monitoring and reporting with feedback loop (bounced, clicked, opened)
- Campaign performance analytics

### 12.30 Sharing experiences – guest speaker Dow Jones Best Practices using Papyrus Software at Dow Jones

Diana Caballero, Director Program Management (See page 9)



# MONDAY, OCTOBER 14

## 13.00 Lunch

### 14.00 Automate and digitize inbound mail channels

Manage all your inbound channels by one single definition and by events, routing mail through the steps of classification, recognition and data extraction to validation and distribution to users in different departments.

- Supervised learning and continuous improvement of the intelligent data capture
- User-trained, multi-channel Inbound Capture
- Integration with existing hardware, software and applications
- System monitoring and auditing

### 14.30 Incident Management / Ticketing in the Omni Channel World

A ticket can be a reported issue, a question, an inquiry, a defect or a change request processed over a period of time to achieve a solution or any other type of complex activity before being 'completed'. The out-of-the box Papyrus Ticketing framework is fast to implement, adaptable and configurable, and unlike alternatives provides your customer with the Omni-channel communication experience.

- A unified single user interface with a 360-degree view of the ticket case for higher productivity
- Adaptive processes for exception handling
- Ticket cases can have related tickets or dependent sub-tickets, all accessed directly from the displayed ticket

### 15.00 Business Applications on Mobile

The 'Mobile workplace' business initiatives reflect a growing reliance on smartphones and tablets. Learn about best practices for going mobile, plus real-world success stories and cautionary tales.

- Which business segments benefit most from a mobile application?
- Mobile backend as a service (MBaaS)
- Integration with existing legacy applications and security

## 15.30 Networking coffee break

### 17.30 Ask the expert session

Discuss with the Papyrus Software management and solution architects:

- Translating company goals into a strategy that consolidates ECM, CRM and BPM
- Optimizing your investment by building an agile communication platform for the future
- Discuss the requirements for the business graphical user interface (GUI)
- Integrating inbound and outbound communication as a business need



# TUESDAY, OCTOBER 15

## 8.30 Welcome with Coffee

### 9.00 Keynote: Digital Business in Real Time

A Website or Mobile device provides public access as an integrated part of the whole Omni-channel network and is directly linked with operational users performing Adaptive Case Management.

- Real-time, responsive communications with back-office user integration
- Live Chat/Chatbot/Social/Web/Mobile interfaces
- Documents in real time with e-Signature
- Easy Onboarding for new products and services, e-Enrollment
- Claims submission, offer request, complaints

### 9.30 Adaptive Case Management – Building your Value Streams!

See the full range from straight-through processes through dynamic processes to completely unstructured processes driven by rules and ad-hoc content arrival, such as scans, e-mails, PDFs, and mobile content.

- On-boarding, recruitment, time management, work task management, lead management
- Adaptive and goal-oriented business processes supporting exception handling
- Enhanced quality and speed of customer service case resolution
- Collaboration and knowledge work
- Desktop, Browser, Mobile, Cloud

### 10.00 Content Management for the Empowerment of the Collaborative Work

Knowledge workers need all information at their fingertips when processing a case. Customer service and call centers must find, view, send and possibly resend information. WebPortal access to documents and e-mail utilizes the short-term archive to control and monitor real-time, responsive communications with back-office user integration.

- Distributed depots, retention periods, GDPR
- Drag-and-drop or directly scan into Archive
- Automatic indexing for full-text search
- Archiving of complete case, annotations and comments
- E-delivery, Mobile and Cloud support

## 10.30 Networking coffee break

### 11.00 Sharing experiences – guest speaker RELI Group A Healthcare Performance Measurement and Review Platform for CMS

Mike Reinhold, Chief Technology Officer (See page 9)

### 11.30 Innovation: Papyrus Converse

Experience a mind-shift. Papyrus Converse brings a whole new perspective on how to externalize business knowledge and implement 'value streams' that are smart and adaptive. Papyrus Converse uses a new method to define, plan and execute 'value streams' that are governed and described within the business architecture based on business language. Business rules are critical to guide the effort of users toward objectives and reduce risk by ensuring compliance.

### 12.00 Integrating with existing applications and legacy

Simplified integration, interoperability and connectivity asks for a SOA handshake integration agreement – platform independent and loosely coupled between the enterprise business application and the Papyrus platform.

- File and Messaging Adapters
- Native integration with databases
- Integration with 3rd party archiving systems
- Integration with existing hardware and software

### 12.30 Sharing experiences – guest speaker Madison Advisors The importance of Inbound Customer Communications

Gina Ferrara, Senior Analyst (See page 9)

## 13.00 Lunch





## Management **CIRCLE** Seminar

**Moderated** by Industry Experts



**Diana Caballero**,  
Director  
Program  
Management,  
Dow Jones



**Gina Ferrara**,  
Senior Analyst,  
Madison  
Advisors



**Max Pucher**,  
CTO,  
Papyrus  
Software



**Mike Reinhold**,  
CTO,  
RELI Group

The **Management Circle Seminar** offers inspiring interdisciplinary topics and engages participants in interesting discussions in a relaxing atmosphere.

This seminar is dedicated to enterprise management and directors who like to exchange experience and ideas with their peers on strategic IT subjects. The Papyrus Software Executives will present four short presentations including different perspectives of important current and future IT topics and how to leverage more of your current Papyrus investment. This will lead into a moderated, interactive communication exchange and open discussion.

### Monday, October 14

**16.00 Discussion:** The Digital Enterprise – Leveraging Machine Learning Capabilities

**17.00 Discussion:** The implications of a lack of integration between ECM and CRM systems

### Tuesday, October 15

**14:00 Discussion:** Building Business Value Streams – A mind-shift is needed

**15.00 Discussion:** Should the Business take ownership of document applications?

## REAL-WORLD REPORTS

### Monday, October 14

#### 12.30 Dow Jones – Diana Caballero, Director Program Management

##### Best Practices using Papyrus Software at Dow Jones

How Dow Jones used an agile delivery approach to incrementally roll out Papyrus Software across our Finance Teams – harnessing the tool for our business practices while navigating compliance concerns. Among our goals for this initiative, the Dow Jones team developed content-centric processes and invoice consolidation, to present a more seamless customer experience.

### Tuesday, October 15

#### 11.00 RELI Group – Mike Reinhold, Chief Technology Officer

##### The Importance of Inbound Customer Communications

Mike dives into how the Papyrus Omni-Channel and Adaptive Case Management capabilities help CMS and Federal Healthcare organizations transform clinical performance measurements and claims review. Papyrus/Reliability helps improve accuracy, speed and time of reviews, while increasing audibility.

#### 12.30 Madison Advisors – Gina Ferrara, Senior Analyst

##### The Importance of Inbound Customer Communications

This session will explore the pain points with inbound communications and how to address them, as well as why inbound communications are an important component to the end-to-end document life cycle. In addition, we will explore why customer service interactions are dependent on data from inbound communications and how technology and organizational structure can help reduce disjointed processes associated with inbound mail and ultimately lead to a better customer experience.

# WORKSHOPS & LABS

## Monday, October 14

### 13.30 Business Designer for Correspondence

- Data interface definition
- Template design, content creation, rule creation
- Change/Release management – from development to production
- Central resource management for corporate fonts and images
- Sign-off, text and content compare

### 14.30 Implementing Single-Source document templates for Print/PDF/HTML

- Get an introduction to creating responsive HTML documents
- Creating and reusing building blocks for each channel
- Creating Wizard forms and its processes
- Defining rules in natural language
- Interactive text editing and letter writing

### 15.30 Adaptive Case Management – Building your Value Streams

- Learn the fundamentals of a case setup
- Define event-driven Business Processes
- Use ACM framework solution on desktop, Mobile and Cloud
- Integrate Correspondence and Inbound Capture into process-driven business applications

### 16.30 Incoming Mail – Capture, Manage, Distribute and Archive

- Intelligent classification, content extraction and automated distribution
- Self-learning with user-trained processes
- User-supported 'Lasso' functionality
- Embedding Inbound mail into Case Management
- Archiving – short-term, long-term, search

## Tuesday, October 15

### 13.30 Output Management – Omni-channel Print & eDelivery

- Bundle and sort outbound mail in the central pool
- Learn how to further automate document delivery to e-channels
- Setup delivery rules, allow for feedback loop and reporting
- Design your print and e-delivery processes
- Experience how documents are optimized with channel-specific content at time of delivery

### 14.30 Mobile Business Apps

- Learn how to create your own dashboard
- Define the Business Process that can be performed on Mobile
- Setup a new existing Correspondence Framework Document Wizard on the Creator

# YOU ARE CORDIALLY INVITED: GOLF AND GALA DINNER

You are cordially invited to join us for the annual Papyrus Software Golf Tournament on Sunday, October 13, starting at 1:00 pm, followed by our traditional Gala Dinner. A shuttle bus to the events will be provided for guests staying at the conference hotel.



## GENERAL INFORMATION

### Conference Location

#### Papyrus Software Solutions and Competence Center

301 Bank St  
Southlake, TX 76092  
T: 817-416-2345

E-mail: [events.us@isis-papyrus.com](mailto:events.us@isis-papyrus.com)

### Registration

To register for the Papyrus Software Open House and User Conference 2019, please visit:  
[www.isis-papyrus.com/register-OHUS](http://www.isis-papyrus.com/register-OHUS)



### Meals

Papyrus Software will provide lunch on both conference days

### Fees

The Open House and User Conference is free of charge.  
Registration is required.

### Conference Hotel

We will provide round-trip transportation to registered guests for the opening events on Sunday and the main program at the Solutions and Competence Center on Monday and Tuesday from the conference hotel. Direct booking is requested, and alternative hotel recommendations are available, as needed.

#### Hilton Southlake Town Square

1400 Plaza Place  
Southlake, Texas 76092  
T: (817) 442-9900 or (800) HILTONS (800-445-8667)

#### Group Rate Code: PAS013

[www.hiltonsouthlaketownsquare.com](http://www.hiltonsouthlaketownsquare.com)

### Directions

The Papyrus Software Solutions and Competence Center in Southlake, Texas, is located near Dallas/Fort Worth Airport:



### Directions

#### Coming from DFW Airport:

Take International Pkwy to the North exit of the airport • exit TX114 West • take exit Southlake Blvd • stay in the left lane until Southlake Blvd • make a U-Turn at the Southlake Blvd bridge onto the eastbound 114 service road • after 300' turn right onto Industrial Blvd and immediately right onto Private Drive • turn left onto Bank St and immediately turn left into the Papyrus Software parking lot.

#### Coming from the Hilton Southlake Town Square hotel:

Exit the Southlake Town Square area on Federal Way to the West and turn left onto Carroll Ave • turn left on Southlake Blvd (FM1709) • follow Southlake Blvd for 1.8 miles • turn right onto Bank St • the Papyrus Software will be on your left after 0.1 miles.

### For more information please contact:

Cari Rhodes  
Papyrus Software  
301 Bank St  
Southlake, TX 76092  
T: 817-416-2345  
E-mail: [events.us@isis-papyrus.com](mailto:events.us@isis-papyrus.com)



# ISIS Papyrus Worldwide

## US Headquarters

**ISIS Papyrus America, Inc.**  
301 Bank St  
Southlake, Texas 76092  
T: +1-817-416-2345

## International Headquarters, Austria

**ISIS Papyrus Europe AG**  
Papyrus Platz 1  
A-2345 Brunn/Gebirge  
T: +43-2236-27551  
F: +43-2236-21081  
E-mail: info@isis-papyrus.com

## Asia-Pacific Headquarters

**ISIS Papyrus Asia Pacific Ltd**  
9 Temasek Blvd. #29-01  
Suntec City Tower 2  
Singapore 038989  
T: +65-6339-8719

## Italy

**ISIS Papyrus Italy Srl**  
via Monte Navale 11  
10015 Ivrea (TO)  
T: +39-0125-6455-00

## France

**ISIS Papyrus France SARL**  
21, Rue Vernet  
75008 Paris  
T: +33-1-47 20 08 99

## United Kingdom

**ISIS Papyrus UK Ltd.**  
Watership Barn  
Kingsclere Business Park  
Union Lane, Kingsclere  
Hants, RG20 4SW  
T: +44-1635-299849

## The Netherlands

**ISIS Papyrus Netherlands B.V.**  
WTC World Trade Center  
Zuidplein 36  
1077 XV Amsterdam  
T: +31-20-799-7716

## Germany

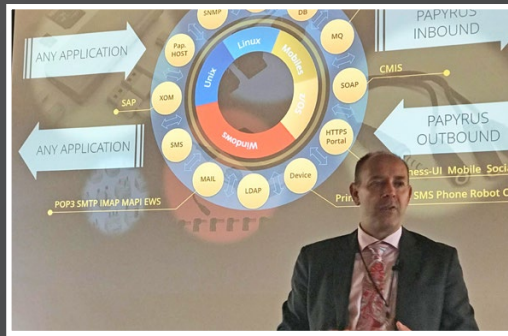
**ISIS Papyrus Deutschland GmbH**  
Heerdter Lohweg 81  
40549 Düsseldorf  
T: +43-2236-27551

## Nordics

**ISIS Papyrus Nordics ApS**  
Science Park Scion DTU  
Diplomvej 381  
2800 Lyngby, Denmark  
T: +45 8827 6170

## Spain

**ISIS Thot SL.**  
Sainz de la Calleja, 14  
28023 Madrid  
T: +34-91-307-78-41



# 2019

SOUTHLAKE, TEXAS - OCT. 13-15

# Open House & User Conference

PAPYRUS SOFTWARE