

# Nuance Document Imaging Professional Services Equitrac 5 Server Upgrade

Upgrade with confidence from Equitrac Express or Office version 4 to the gold standard Equitrac version 5.



## Moving from Equitrac Express or Office version 4 to version 5

Upgrading a working solution that has been in place for a number of years is always a complex undertaking that should be handled carefully to reduce risk and impact to your business. Nuance® Professional Services is the ideal team to carefully perform an upgrade of your existing Equitrac Express or Office version 4 system to the industry leading Equitrac Express or Office version 5 platform!

### Upgrade Benefits

Only Nuance Professional Services has the skill and experience with all versions of Equitrac to manage an upgrade with minimal risk to your business. Our years of deploying Equitrac installations as well as our direct integration with Nuance engineering and customer support makes us the right choice to understand, plan and perform your Equitrac upgrade.

### Why Partner with Nuance Professional Services?

The Nuance team of Professional Services Consultants have over 15 years of industry experience and service customers globally. Customers benefit from Nuance professional services' direct access to Nuance's world-class technical support and product engineering groups. Questions can be clarified quickly and an entire team of experts can collaborate to solve even

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### Essential Services

An upgrade engagement following best practices and a proven methodology to migrate your Equitrac 4 server solution to Equitrac 5.

### Upgrade activities covering:

- 1 CAS server
- Up to 3 servers
- Up to 3 workstations
- Basic system review
- Upgrade plan document
- Admin knowledge transfer
- Initializing up to 15 devices

### Additional services available for:

- Initializing up to 50 devices
  - Initializing up to 100 devices
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## What is an Equitrac Express/Office upgrade engagement?

Upgrading your Equitrac 4 server to version 5 requires careful planning and a deep understanding of the complexities and potential challenges with changing versions for in-place or parallel upgrade scenarios. Nuance Professional Services will analyze your existing system and develop and execute an upgrade plan designed to minimize risk and impact to your business operations no matter which option you choose.

**For customers with Equitrac Express/Office version 4.2.6 and above, upgrade programs are available as follows:**

- **Equitrac 5 Server Basic Upgrade (EQ-1) (40 hours)**
  - Basic system review
  - Upgrade plan document
  - Upgrade 1 CAS server to version 5.6
  - Configure up to 3 additional servers (non-CAS)
  - Configure up to 3 workstations
  - Administrator knowledge transfer up to 2 hours
  - Initialize up to 15 devices
- **Equitrac 5 Server Intermediate Upgrade (EQ-2) (64 hours)**
  - Basic system review
  - Upgrade plan document
  - Upgrade 1 CAS server to version 5.6
  - Configure up to 3 additional servers (non-CAS)
  - Configure up to 3 workstations
  - Administrator knowledge transfer up to 2 hours
  - Initialize up to 50 devices
- **Equitrac 5 Server Advanced Upgrade (EQ-3) (80 hours)**
  - Basic system review
  - Upgrade plan document
  - Upgrade 1 CAS server to version 5.6
  - Configure up to 3 additional servers (non-CAS)
  - Configure up to 3 workstations
  - Administrator knowledge transfer up to 2 hours
  - Initialize up to 100 devices

**Customers with Equitrac Express or Office versions 4.0.0 to 4.2.5 must include the following upgrade program in addition to one of the above program packages:**

- Equitrac 4 upgrade prep (EQ-4) (8 hours)
  - Upgrade 1 CAS server to version 4.2.6

To learn more, contact your Nuance Document Imaging representative by calling +1-800-327-0183. You can also visit [nuance.com/for-business/imaging-solutions/professional-services/index.htm](http://nuance.com/for-business/imaging-solutions/professional-services/index.htm) or email us at [ndisales@nuance.com](mailto:ndisales@nuance.com).

### Scope and Constraints

- Services hours are delivered consecutively and remotely.
- Equitrac Enterprise is not eligible for this upgrade program, however a custom services quote can be provided.
- Upgraded systems include the same configured functionality as the existing system. The inclusion of new features or configuration changes requires a custom services quote.
- Equitrac server will be upgraded to version 5.6
- Device client upgrades are out of scope

### How do I order an Equitrac Upgrade?

Contact Nuance Sales and obtain a quote for any related product licenses plus the one of the upgrade **program codes below** and the appropriate number of services hours listed for the program using SKU EQINS1HR:

- **EQ-1 Basic** for 40 hours
- **EQ-2 Intermediate** for 64 hours
- **EQ-3 Advanced** for 80 hours
- **EQ-4 Prep** for 8 hours (for version 4.0.0 to 4.2.5 customers)

**Note:** By ordering using the program code above, you are acknowledging that such Package is provided pursuant and subject to your executed agreement with Nuance.

### About Nuance Communications, Inc.

Nuance Communications, Inc., is a leading provider of voice and language solutions for businesses and consumers around the world. Its technologies, applications and services make the user experience more compelling by transforming the way people interact with devices and systems. Every day, millions of users and thousands of businesses experience Nuance's proven applications. For more information, please visit [www.nuance.com](http://www.nuance.com).