G-Cloud 13 Pricing and Service Definition

An official partner of

UNIT4

Crown
Commercial
Service
Supplier

Contact details

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Release Control

Dist. No.	Release Date	Version	Release Notes
1	18th May 2022	1-0 final	Authorised for G-Cloud publication

Contents

Integra Associates Limited

Integra Associates Limited is an official partner of Unit4, and is the longest-established independent Unit4 ERP Consulting practice within the UK. Unit4 ERP is the new name for Unit4 Business World (Agresso) or U4BW.

Established in 1995, Integra has worked with clients across a wide range of industry sectors including professional services, universities, financial services, local government, central government, non-profit and emergency services. As well as providing services within the UK, we have also supported our clients in Europe, the Middle-East, Asia and the Americas.

Integra provides strategic and operational services including:

o   business process analysis and re-engineering
o   product selection and implementation
o   upgrade and improvement projects
o   programme and project management
o   system integration
o   software design and development
o   installation and technical services
o   data cleansing and migration
o   training programme management and execution
o   outsourced and hosted services
o   software development

Our approach is to understand the issues faced by different functional areas of your business, and the role played by these areas within the wider organisation information provision. We also recognise the importance of recognising the organisational culture and available resources.

Adopting this holistic view allows us to maximise your return on systems investment.

ROI is achieved by developing practical solutions that combine optimum fit to both the environment and that enable your users to meet the challenge of efficient processing.

We have a 'hands on' approach and we aim to provide a highly-tailored customer-specific focus to every project we undertake.

Integra is Cyber Essentials and BS7858 accredited, and ISO9001 quality standard accredited.

Cloud Software - Definition

Making Tax Digital solution

Our Making Tax Digital solution has been specifically designed for Unit4 ERP and helps you ensure compliancy with the HMRC's full regulations, including those that came into effect in 2020/21. Our solution is HMRC-approved and works with a number of complex VAT set-ups. The Service comprises of Software and Services; the level and type of services are dependent on customer preference.

Features

o   Send VAT returns via the HMRC's dedicated API
o   Specifically designed for Unit4 ERP
o   Works on desktop and web
o   Works on various milestone versions of Unit4 ERP
o   Compatible with multi-client, multi legal entities in a single client and multiple VAT groups
o   Ability to make manual adjustments should it be required

Benefits

o   Comes complete with an annual maintenance and support package
o   Help ensure compliancy with Making Tax Digital
o   Fully compliant with HMRC's regulations, including up to 2020/21
o   Available at a standard price

Our MTD solution comes complete with an annual maintenance and support package, which gives you access to our Unit4 ERP Support Desk

Exchange Rate solution

Our Exchange Rate solution has been specifically designed for Unit4 ERP and enables you to automatically update your system with the latest exchange rates from a range of sources.

Features

o   Import exchange rates from various 3rd party FX sites
o   Fully integrated with Unit ERP
o   Retrieve the latest or historical rates
o   Comes complete with annual maintenance package
o   Choose from seven providers – some free and others require a subscription
o   Can be adapted to work with other providers at an extra cost

Benefits

o   Reduce manual input errors
o   Can be run manually or automatically on a pre-defined basis
o   Ensure the correct conversion rate is used
o   Save valuable internal time
o   Available at a standard price
o   On-going support and updates
o   Choose your preferred source

Role Loader solution

Our Role Loader solution has been specifically designed for Unit4 ERP and enables you to bulk update roles for users/positions, and update existing roles linked to uses so you can perform a number of updates efficiently.

Features

o   Bulk upload or update roles related to users
o   Bulk upload or update roles related to positions
o   Can be used to add new roles or remove/close roles
o   Data created in CSV and saved into the data import
o   Fully integrated with Unit ERP
o   Complete with annual maintenance package

Benefits

o   Save valuable internal time
o   On-going support and updates
o   Available at a standard price
o   Works out of the box as standard
o   Manage user and position roles easily

Invoice Auto Amortisation

Our solution delivers an add-in to the Invoice Entry Screens providing an enhanced version of the "Recurring Journal" function. When coding invoices, the user can specify the Prepayment code to release the invoice to and the release frequency.

Users run the release process at month end and the release journal is created.

Features

- Compatible with both Supplier and PO invoices withing Incoming Invoices
- Logic can be entered at invoice entry or as part of the workflow process
- Prepayment account selected as part of the invoice entry process
- Number of periods/months the invoice is to be amortised/prepaid over is selected
- Initial period or date range for amortisation/prepayment is selected
- Proposed amortisation scheduled saved in custom table.
- Proposed data can be enquired on
- All prepayment journals for the month, created each month by running a batch server process
- Proposed amortisations/prepayments can be cancelled if no longer required.

Benefits

- Save valuable internal time
- No need to keep manual prepayment workings in excel
- Journals automatically created each month.
- Future periods not required to be at an open status
- Improvement on core recurring journal feature as can be configured to use dates as well as periods
- Ongoing Support and updates
- Simple installation and configuration to set up.

ExLibris Integration Kit

ExLibris and their product Alma is the world leading Library software used by the University sector, all Library goods and services are brought and managed via this software solution.

We have developed an integration kit, using the Unit4ERP API's and standard Alma file formats that enables you to:

o Push the Purchase Order raised in Alma to a requisition in Unit4 so they can be workflowed for approval.Or Alma PO can be pushed straight to Unit4 PO if no workflow is required.
o Create the output file back to Alma with the failure / success of the requisition along with the Unit4 ERP PO number if applicable
o Import invoices from Alma either directly to AP (GL07) or via the Invoice Matching Server (EI02)
o Create the output file back to Alma when invoices are paid or rejected

In addition, there are mapping tables with our solution to handle the key looks up on Suppliers, Account Code, Project codes

Features

o Uses standard Alma file formats out of the box
o Fully integrated with Unit ERP
o Complete with annual maintenance package

Benefits

o Save valuable internal time
o Enables full visibility of Library supplier spending in Unit4 ERP without the need for manually entering data in both systems
o On-going support and updates
o Available at a standard price
o Quick installation and configuration to get set up

Web Data Fill

Our product provides an easy interface via a flexi field that enables a consultant to build various rules/logic to assist with the code competition on not only forms and flexifields but also some standard web screens. It allows you to do things like calculations from both fields on the page and SQL, populate data from a template into a flexi field, Make fields/rows Read Only, generate error messages when saving if certain criteria are not met and create links to other screens or browsers drilldowns.

Features

o Customise your web screens from simple configuration flexifields
o Add more control to your forms
o Import data into forms / flexifields / screens to save your users re-keying
o Create dynamic links within screens to improve user flow
o Fully integrated with Unit ERP
o Complete with annual maintenance package

Benefits

o   enhances user experience
o   simplifies data entry
o Save valuable internal time
o On-going support and updates
o Available at a standard price
o Quick installation and configuration to get set up

Workflow Approval Task Customisation

Our tool allows for customisation of your workflow approval screens by adding additional fields, totals and even links to other areas of the system.

Currently built for the GL Approval screen it can be expanded to other screens on request.

Features

o Customise your approval screens from simple configuration flexifields
o Show additional standard or custom fields
o Add totals to columns
o Create dynamic links within screens to improve user flow
o Fully integrated with Unit ERP
o Complete with annual maintenance package

Benefits

o Save valuable internal time
o On-going support and updates
o Available at a standard price
o Quick installation and configuration to get set up

TopGen Configurator

The Arribatec TopGen Configurator is a tool that makes it possible to do advanced configuration of all TopGen screens in Unit4 ERP.

The Configurator enables faster deployment of functionality that traditionally has had to be developed using customized ACT solutions.

By using the tool, simple measures can be done to improve usability and data quality in registration and approval screens throughout Unit 4 ERP.

The Configurator supports TopGen screens only. Both Desktop and Web are supported. Experience pack screens are not supported.

Partial Credit Note Tool

As of today, the standard Unit4 ERP product does not allow you to request partial credit notes on a comfortable manner. To do so, you must completely credit your invoice (running a TS25 process) and then re-invoice the lines that you wanted to remain invoiced.

This method also has other problems: taxes are not calculated correctly, and you cannot select the exact amount to credit from each invoice line.

To address this issue, this product includes a new screen that properly lets the user request partial credit notes, not only allowing the user selecting which invoice lines to credit, but also specifying the exact amount/percentage/units to credit from each line

Cloud Software - Pricing

In respect of all Cloud Software prices, the following applies:

o All rates exclude VAT which will be charged as incurred at the prevailing rate;
o Expenses will be charged in addition where services are to be delivered on-site
o The Consultant(s) will be provided with full and appropriate accesses to Unit4 ERP and the Unit4 ERP test and live environments to allow the work to be done
o The increase in Maintenance Charges and Annual SaaS Subscription in any one year will be:
    o **Either** 3%;
    o **O**r the annual rate of increase in CPI plus 1% (Consumer Prices Index) as published two months prior to the annual renewal date
    o **Whichever** is the higher
o Contractual terms apply

Making Tax Digital

	Cost	Cost Basis
Application Licence	£6,560	One Off
Maintenance Charge *Maintenance year runs from January to December. First year's charge will be pro-rata based on month of purchase*	£1,350	Annual Recurring

Exchange Rate

	Cost	Cost Basis
Application Licence	£1,995	One Off
Integration with new FX rate provider	£500	One Off
Maintenance Charge *Maintenance year runs from January to December. First year's charge will be pro-rata based on month of purchase*	£399	Annual Recurring

Role Loader

	Cost	Cost Basis
Application Licence	£1,995	One Off
Maintenance Charge *Maintenance year runs from January to December. First year's charge will be pro-rata based on month of purchase*	£399	Annual Recurring

Invoice Auto Amortisation

	Cost	Cost Basis
Application Licence (SaaS)	£2,995	Annual SaaS subscription

ExLibris Integration Kit

	Cost	Cost Basis
Application Licence	£4,995	Annual SaaS subscription

Web Data Fill

	Cost	Cost Basis
Application Licence	£4,995	Annual SaaS subscription

Workflow Approval Task Fill

	Cost	Cost Basis
Application Licence	£1,995	Annual SaaS subscription

Topgen Configurator

	Cost	Cost Basis
Application Licence	£3,600 to £8,400	Annual SaaS subscription

Partial Credit Note Tool

	Cost	Cost Basis
Application Licence	£3,600 to £8,400	Annual SaaS subscription

Cloud Support - Definition

The following describes our full range of professional services which can be procured under the G-Cloud 13 framework.

Project Management

The keystone to a successful project is effective project management. The role of the project manager is primarily to ensure a project delivers the objectives set out within the business case, in the required timescales and to the agreed cost. Integra has considerable experience of managing both new implementations and upgrades of Unit4 ERP, including migration to the latest versions.

Integra's project managers can work either in an advisory capacity or by adopting the full role and responsibilities of project manager for the project. In either case our project manager will work closely with the customer's Project Board and Project Sponsor to ensure that the project control framework, communications, and risk and issue management are in place to support successful project delivery. Integra offers two levels of Project Management service:

o   Client-side full life-cycle project management, whereby the Integra project manager assumes full responsibility for the customer's and Integra's resources and for the overall day-to-day management of the project on behalf of the customer
o   Project management consultancy, whereby the customer provides the main project manager and the Integra project manager takes responsibility for the management of Integra resource, and provides support to the customer project manager.

Where the customer does not have the necessary capacity or skills to provide their own Project Manager, Integra can provide a full time (or as otherwise required) Project Manager to take responsibility for the day-to-day management of the project.

Reporting to the Project Sponsor, Project Board or other nominated member of the customers' management team (according to the project governance structure adopted), our skilled and experienced Project Manager will lead your project to a successful conclusion delivering the required solution on time and to budget.

o   Project Governance   Project Initiation Document, Risk Register; project reporting;
o   Communication   Communication Strategy, Communication Plan
o   Planning / Control   Project Plan; Issues Register, RAID reporting
o   Design and Build   Solution Design Document; Customisation Specification
o   User Acceptance   UAT Strategy; UAT Approach; Test monitoring
o   User Training   Training Needs Analysis; Training Strategy; training materials
o   Implementation   Cut over Go Live plan; Project Close

Working to recognised standards and methodologies our project managers are skilled in all aspects of project delivery and are supported by a wealth of Integra resource including a library of template documents

Some of the benefits and skills that will be delivered through the deployment of an Integra Project Manager will include:

o   The ability to plan and manage the entire project throughout its various phases
o   Excellent leadership: decisive, influential and motivational
o   The ability to manage change throughout the organisation
o   knowledge and experience of working with Unit4 and the Unit4 ERP software & technical environment helping to pre-empt many issues and problems, avoiding common pitfalls and ensuring best practice
o   Getting things right first time saving on costs
o   An honest, straight forward and transparent approach to communications

Project Management Consultancy

Where the customer is likely to appoint its own project manager to take overall responsibility for the project, Integra can provide Project Management Consultancy services, which will encompass:

o   Management and scheduling of Integra resources
o   Responsibility for delivery of Integra's contractual commitment
o   Primary point of contact for the Customer project manager
o   Supporting the production of project initiation documentation: PID, project plan, risk register and other project governance documentation
o   Support monitoring and maintenance of the project plan
o   Support review and mitigation of project risks
o   Support management of issues
o   Support management of stakeholders and suppliers (Unit4)
o   Attend project team, board or review meetings, as appropriate
o   Support to the customer project manager throughout the project
o   Provide injection of Unit4 ERP knowledge and experience

Our library of template documents is also available to our customers who use our Project Management Consultancy service

Application Consultant

Our Application Consultants and Senior Application Consultants operate and deliver services at SFIA level 4 and above. The key skills and services delivered by our consultancy team include but are not limited to:

o   Review and analysis of current process and procedures
o   Recommendations for improvement to process and procedure
o   Identifying and supporting the definition of requirements
o   Business case development
o   Providing advice and guidance in respect of the implementation of Unit4 ERP
o   Delivering workshops to support design and configuration decisions
o   identifying operational change required to enable new solutions to be implemented
o   configuration and implementation of new systems and functionality
o   support project team testing;
o   provide support to User Acceptance Testing;
o   resolve application queries or issues that arise out of testing;
o   provide support at the time of go live;
o   provide post go live support;
o   provide Unit4 ERP implementation and upgrade experience;

Junior Consultant

o   Our Junior Consultants operate and deliver services at SFIA levels 1 to 4.
o   Primarily deployed to support our Application Consultants, key responsibilities can include:
   o   Acting as scribe at workshops or other meetings and support the development of project documentation
   o   System set up and configuration
   o   Data cleansing and data load
   o   Report building
   o   Undertake testing on behalf of the customer

Technical Consultant

The technical services delivered in support of your Hosted or Managed implementation of Unit4 ERP are set out in detail within the Service Definition documents for these two Cloud Services – please refer to our related G-Cloud 11 services. In addition to these services, our Technical Consultancy team can also provide:

o guidance and advice in respect of the servers and environments that will be required to support Unit4 ERP;
o provide technical advice in respect of Unit4 ERP to your project team;
o undertake customisation using Unit4's ARC and ACT toolset (see below)
o support for the interfacing/integration of Unit4 ERP with external systems using:
    o Webservices;
    o ITK – Interface ToolKit
    o ETL – Unit4's proprietary Extract, Transform and Load tool;
    o standard data import tools such as GL07 or LG04;
    o uploading via Excelerator and BIF;
    o custom built bespoke solutions
o support the migration and loading of data extracted from legacy systems using the above tools
o provide technical support where required during testing;
o provide go live and post go live support
o provide Unit4 ERP implementation and upgrade technical experience

Unit4 ERP Customisation (ACT)

ACT offers a powerful toolset which can be used to create bespoke customisations for the Unit4 ERP software. Very few organisations have the skillset to develop and support ACT development. Integra is in the unique position of having a track record of delivering successful customisations in both VBA and ACT for over ten years. Our development team has been fully trained by Unit4 in the development of ACT customisations.

Training Needs Analysis / Training Strategy

Based on the functionality to be implemented, our experienced consultants will undertake a review of current and required skill levels within the end user community from which a Training Needs Analysis, defining all required training needs, will be established.

Based on the Needs Analysis, our training team will define and agree with you the recommended Training Strategy to be adopted setting out the required courses, presentations and materials to be created and delivered and the timescale and methods for delivery of training.

Integra is able to offer a full range of training services to our clients, including:

o   Training Strategy and Planning
o   Creating a full suite of bespoke training documentation
o   Delivery of classroom style hands-on and hands-off training
o   Report Writer Training – Excelerator, Browser, ARC, ARW
o   Web based on-line video-based Training
o   Train the Trainer Courses
o   Floor walking
o   Coaching and one-to-one mentoring
o   Technical Training on SQL Server/Oracle
o   Training Environment preparation – build training system.

Preparation of training materials

Typical estimates for the preparation of training materials are:

Activity	Estimate
Development of materials for a presentation	2 days per presentation
Development of materials for classroom training (by subject)	3 days per course
Development of quick cards (by subject)	½ day per card
Development of e-learning videos (by subject)	to 2 days per video

All training courses are tailored to the client's configuration and bespoke training materials become the property of the customer on full payment.

Delivery of training materials

Typical estimates for the delivery of formal training are:

Activity	Estimate
Delivery of lecture theatre style presentation	1 to 2 hours per delivery
Delivery of classroom training course (up to 6 attendees)	½ to 1 day per delivery

Services such as one-to-one training, floor-walking, and so on, are charged on a 'per day' basis.

Delivery of standard courses

With over 24 years' experience of working with Unit4 ERP, Integra has amassed a wealth of knowledge about the various Unit4 ERP reporting and customisation tools.

Browser and Excelerator – reporting tools

All of our Application Consultants have good knowledge of UNIT4 ERP Browser and Excelerator and we have developed training courses (standard and advanced) for each of these tools.

Each course is one day long and can be delivered on site to a maximum of 6 users, assuming suitable training facilities can.be provided.

Cloud Support - Pricing

The following prices cover any professional services required to assist with the implementation of Cloud Software, delivery of Cloud Support or for any other purpose.

Standard Integra Rate Card

Service Description	Fee Rate per Day	Cost Basis
Project Management	£875 to £1250	Time and Materials
Consultancy		
Application Consultant	£875 to £1250	Time and Materials
Junior Consultant	£500 to £1000	Time and Materials
Technical Consultant	£875 to £1250	Time and Materials
Skills Development		
Needs Analysis / Training Strategy	£875 to £1250	Time and Materials
Preparation of Training Materials	£800 to £1175	Time and Materials
Delivery of Training Materials	£800 to £1175	Time and Materials

- o Our services are costed on a Time and Materials basis.
- o All rates exclude VAT which will be charged as incurred at the prevailing rate
- o Expenses will be charged in addition where services are to be delivered on-site
- o Discounts can be applicable for large programmes of work
- o We will consider engaging in fixed price contracts on a case by case basis