



PlotBox Pro

G-Cloud 14 - Service Definition Document

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Introduction

This document outlines some of the key features and service points of the PlotBox solution and is not intended to be an exhaustive list of all features/functionality.

Should you have any queries, please contact us via the details on the Service Listing, or via info@plotbox.com.

PlotBox Functional Specification

Overview

PlotBox provides UK Local Authorities with a single operational view of all records relating to cemetery and crematorium operations, including

- Burials
- Cremations
- Plots
- Deeds
- Deceased Records
- Scheduled Events (across all facilities)
- Work Orders
- Work Permits
- Documents
- Risk Assessments
- Finance
- Contacts
- Memorials

Delivery Method

PlotBox is an entirely web-based platform, hosted in the Cloud. No plugins or additional configuration is required to access the service.

Interactive, Digital Mapping

Produced by drone flights which will be undertaken by CAA qualified commercial drone pilots who are PlotBox employees.

Existing data and maps will be overlaid onto the drone imagery, offering a visual representation of all cemetery data within PlotBox's specifically designed GIS solution.

The mapping feature offers a heatmap of the Customer's inventory for each facility, showing a visual representation of remaining capacity, and the status of each plot.

Dashboard

PlotBox also provides a User Dashboard which gives each user the ability to pre-set their own unique dashboard, meaning they have access to the information important to them.

Through a library of widgets, users can build a dashboard to show live information across a range of module areas.

Diary

PlotBox offers a single schedule view, via which you may configure multiple diaries. This offers the Customer a consolidated view of all operations, on one screen, meaning the Customer can configure diaries for events such as Burials, Cremations, Ash Internments, Services, Scatterings and other bookings/appointments.

Burials

Burial records can be added via a number of methods. Initial bookings may be added via the Diary, or requested via the Funeral Director Portal.

PlotBox allows the Customer to record:

- Booking details
- Deceased details
- Applicant details
- Associated Deed (or create a new record)
- Selected Plot
- Burial instructions
- Associated Work Orders
- Associated Fees

Authorised users can upload scanned documents and paperwork. Alternatively, these can be transferred via the Funeral Director portal.

The system allows for the generation of required documentation and certificates e.g. Burial Instructions, Deed Certificates etc.

The system allows the Customer to view the required Burial Registers, and to manage the exhumation process.

Cremations

The Cremation module allows the Customer to manage the cremation process from request through to memorial.

A new cremation record can be created from the Diary, (or via the Funeral Director Portal), and offers the user the ability to record:

- Booking details
- Deceased details
- Medical contact details
- Applicant details and preferences
- Service details (options for integration with Media Services)
- Disposal details
- Associated Work Orders
- Associated Fees

Authorised users can upload scanned documents and paperwork. Alternatively, these can be transferred via the Funeral Director portal.

The system allows for the management of cremation-specific processes including management of stored remains, remains from away, and the generation of required documentation and certificates e.g. Authority to Cremate, Floral Tributes, and Identity labels.

PlotBox allows the Customer to generate the required Cremation Registers, along with associated reporting including

- CMA Returns
- Cremation Society Returns

Memorials

PlotBox includes the ability to manage leased memorials and memorial permits. For leased memorials, this includes the option to generate memorial agreements, order forms, and installation notices.

For permits, users can record the details of the permit application, store associated documentation (e.g. drawings of proposal memorials, proof of owner consent), and easily approve/reject the permit application.

Again all information will be linked so if you search for a deceased record you will be able to see any linked memorials relating to this record.

If you use the mapping module you can also link memorials to a location and this can be linked to a plot and deceased record and owner.

Authorised users have full control over the configuration of memorial types, effectively allowing the Customer to create memorials of any nature.

Records, Deeds, Plots

The core modules of PlotBox focus on one place to keep all records related to a plot intuitively linked to each other.

Records

Authorised Users can manage deceased records in the “Records” module. Users can configure which fields are visible/required.

Records can be retrieved using an extensive search facility. Search results can be displayed to the user in either a list format or on a map. Results can be exported.

When viewing a record on the map, all associated information is directly available including any linked images.

Deeds

Authorised users can manage a list of Deeds in the system. When adding a new deed the user can record the following information:

- Associated Facility and Plot(s)
- Deed Owner(s)
- Payments
- Beneficiaries

Related documents can be uploaded, and stored against the record.

Authorised users can generate the Deed Certificate and any associated documents.

Plots

Comprehensive information about interment locations can be managed.

Plots are linked to mapping to provide spatial awareness of their location within the cemetery.

Information about ownership of interment rights, interments, and memorials can be accessed from the Plot record.

Authorised users can also access and record Risk Assessments against the Plot record - see *Memorial Risk Assessments*.

Finance

PlotBox allows for the configuration of Fee Types linked to each record area, for example, Deed Purchase, Burial, Cremation, Memorial etc.

The platform allows authorised Users to create, edit, and manage invoices.

The system also offers management of Credits, and integration with a range of commonly used Corporate Finance systems.

Document Generation

PlotBox includes an embedded tool to support document generation, offering both access to a library of existing templates which we have defined for our customer base, along with the option to create new and custom templates as required.

The list of pre-defined templates includes Burial and Cremation documents, Deed Certificates, Memorial agreements and reminder letters, identity labels and floral tribute labels.

Templates can be amended by authorised users, without support from PlotBox.

Work Orders and Permits

PlotBox uses Work Orders to assign tasks within your cemeteries or crematorium. Work Orders can be generated to accommodate common tasks, and attached to a variety of entities (e.g. burials, cremations, memorials, deeds, plots).

The status of Work Orders can be tracked and managed to ensure compliance with service level agreements and so that customers' expectations are met.

Work items can be updated in the field, using mobile devices. Users may also attach a photograph of completed works.

Similar functionality exists for Work Permits, allowing the Customer to better manage works undertaken by third parties e.g. Memorial Masons.

Memorial Safety Checks

Authorised users can carry out a risk assessment on a plot (it is recommended to perform this task on our iPad app but the facility is also available on the web app)

Users can record the required information against a Memorial Safety Check, including the resulting risk level, and any remedial actions.

Users can also add notes, and attach images of the plot/memorial.

Funeral Director Portal

PlotBox offers the ability for Funeral Directors to request bookings online, available on a 24/7 basis. Our portal presents a live feed of availability, based both on current bookings and the Customer's own rulesets.

Our Funeral Director Portal also allows Funeral Directors to upload and transfer documentation electronically to the Customer. All files received are stored immediately against the associated system record.

Memorial Mason Portal

A similar portal can also be provided to allow Memorial Masons to submit permit applications online, with the ability to complete application forms, provide details of the work to be undertaken, and attach relevant documentation e.g. drawings / proof of owner consent.

iPad App & Offline Access

Through the included iPad app, the Bereavement Services team will have mobile access to plot and deceased records, even when no connection is available.

Mobile users can view and edit records, complete risk assessments, and view maps in online or offline modes. Any changes made in offline mode can be synced back to the live system once a connection is re-established.

For Risk Assessments, this includes the ability to capture a photograph of the memorial, which will be uploaded to the system during syncing.

Reporting

PlotBox includes a detailed reporting module, which enables the Customer to meet both performance and statutory reporting functions.

Users can configure the columns which are included, and the sort order of results. Results can be filtered in the application, and exported to a range of formats including PDF and XLS.

Public Access

The PlotBox platform includes a public access facility to allow members of the public and genealogists to search for deceased records online.

This includes options for headstone photographs, descriptions for people of interest, walk-to-grave directions.

To ensure accessibility, the Public Access portal is compliant with Web Content Accessibility Guidelines 2.1.

Finance Integration

Through our experience in the UK Local Government market, PlotBox now offers a range of integrations to the most commonly used Finance packages.

This is proven to reduce the administration of invoices and payment records, for both Bereavement Services and Finance teams.

On-site Audit

Stemming from a Survey and Engineering background, PlotBox offers unique, unrivalled technology functionality to enable on-site verification of graves, identifying any discrepancies for remedial action.

This can be undertaken by PlotBox employees, or by Customer staff and includes the ability to carry out audits on a mobile device accurately without needing an internet connection.

Configuration

PlotBox is highly configurable, designed to allow Administration users to make configuration changes without support.

There is a settings area which can be permission based so that not all users have access and this allows configuration of over 35 various areas such as diary times, document templates, fees, users, funeral directors, workflows, work orders, religions, facilities, sections and much much more.

Methodology and Service Delivery

Onboarding/offboarding

The Onboarding process will vary depending on the size of customer, the modules they choose to start with and the services they want us to provide (e.g data migration, mapping etc). Each new customer will be allocated a dedicated Project Manager (PM) as well as team leads from other departments as required such as a Technical Consultant for data migration, a GIS expert for mapping, a Training Consultant and a Customer Success representative.

Each project will have a Statement of Works (SOW) detailing the agreed scope of the project and a project plan. There are a few key milestones within the project such as Discovery, Data Acceptance Testing, Training and Go-live. We tailor training plans to include online and onsite training.

The Implementation project will be formally scheduled within PlotBox based on completion of Final Contract and receipt of Initial Payment. Once both of these are achieved the Project Planning phase can proceed.

During the Project Initiation phase, the project plan will be discussed, updated and agreed based on resource availability for both Plotbox and Client, assignments to project tasks with dependencies and timeframes for both parties agreed, so our approach is very much a partnership model. As these tasks are critical factors in project success, we will work closely with you to confirm the project timeframe. The project timeline has significant dependency on delivery of client prerequisites, so it is important to provide these at the earliest convenience.

The end of the contract process is covered in the detail of the PlotBox Terms and Conditions document uploaded. At the end of the contract process we would provide you with a flat table structure of your data.

Direct User Support

Provided by a UK-based team, and offered to authorised users directly within the application, with an average 5 minute response time.

All support is provided by qualified PlotBox employees, with no support boundaries within the product.

Customer Success

At contract award, the Customer will be allocated a Customer Success Manager, who is responsible to ensure that the Customer continues to gain value from their PlotBox implementation.

Data Migration

PlotBox has a team of Technical Consultants with proven experience of data migration from the most common cemetery and crematoria management platforms.

Our team uses best practice methodologies for Data Migration, which has been independently verified.

Product Updates

Under the Software as a Service (SaaS) model, PlotBox releases new product features on average every 6 weeks.

Within the agreement, the Customer will always have access to the latest version of the product.

This means no upgrade projects are required, and therefore no cost for upgrades.

Product Roadmap

We are fully committed to on-going development of PlotBox to meet the needs of a changing industry. We will continue to improve PlotBox by using the latest in modern technology and we will continue to innovate within this industry. In addition to technological changes we will also react to legislative changes and industry best practice guidance from guidance bodies such as the ICCM.

PlotBox has a roadmap specific to UK Local Authorities, including improvements and new features, which will create new revenue streams for the Customer.

PlotBox Technical Specification

Hosting

The entire system will be hosted on PlotBox's cloud servers, provided by Microsoft Azure, our chosen Infrastructure as a Service (IaaS) provider.

For UK Customers, we will only use UK data centres - ensuring all UK Customer Data remains within the UK.

Azure Security

By selecting Azure as our infrastructure partner, we have access to the tools and techniques Microsoft has access to.

Azure provides a trusted foundation that allows us to design, build and maintain a secure Cloud-based application that respects and protects your data. Some of the security-focused services and capabilities provided by Azure include:

- **24-hour monitored physical security.** Data centres are physically constructed, managed and monitored to shelter data and services from unauthorised access as well as environmental threats.
- **Monitoring and logging.** Security is monitored with the aid of centralised monitoring, correlation and analysis systems that manage generated information and provide timely alerts.
- **Patching.** Integrated deployment systems manage the distribution and installation of security patches.
- **Intrusion detection and DDoS.** Intrusion detection and prevention systems, denial of service attack prevention, regular penetration testing and forensic tools help identify and mitigate threats from both outside and inside of Azure.
- **Zero standing privileges.** Access to customer data by Microsoft operations and support personnel is denied by default. When granted, access is carefully managed and logged.
- **Isolation.** Azure uses network isolation to prevent unwanted communications between deployments and access controls block unauthorised users. Virtual Machines do not receive inbound traffic from the Internet unless specifically configured to do so.
- **Azure Virtual Networks.** Multiple deployments can be deployed to an isolated Virtual Network and allow those deployments to communicate with each other through private IP addresses.
- **Encrypted communications.** Built-in SSL and TLS cryptography enables customers to encrypt communications within and between deployments, from Azure to on-premises data centres and from Azure to administrators and users.
- **Data encryption.** Azure offers a wide range of encryption capabilities up to AES-256.
- **Identity and access.** Azure Active Directory is available and Multi-Factor Authentication and access monitoring offer enhanced security.

Data Location and Sovereignty

PlotBox customer's data will be stored in Azure's UK Data Centres. PlotBox's Cloud Architecture may transfer Customer Data within a geo (e.g. within UK) for data redundancy. For example, we replicate images and backup data between two regions within the same geo for enhanced data

durability in case of a major data centre disaster. PlotBox will not move Customer Data outside of the Region.

The advantages of the hosting solution include:

- Maximum scalability and performance, whereby a lower grade server can be deployed (thereby at reduced costs) but upscaled as volume and performance demands.
- Load-balanced servers can be deployed if volume becomes a further issue that is not solved by raising the specification of the server (e.g. an increase in memory).
- Disaster recovery becomes almost trivial with a cloud provider such as Azure as an image of the failing server can be spun up within minutes to get the application going again.
- Server performance and monitoring tools are deployed as standard.

Eliminates the need to invest in hardware purchase and installation - as the system demands change (either to upgrade or downgrade) the required virtual hardware can simply be re-configured.

With this hosted solution there are no server or hardware specifications required to be met by the Customer, the only software specification is that internet access will be required and the following browsers will be supported:

- Chrome version 21 and above
- Safari version 5 and above
- Firefox version 14 and above

We can confirm that a test and a live environment will be configured and made available to the Client.

PlotBox in the cloud only requires a browser; eliminating any software or hardware incompatibilities. Obviously, for a cloud solution there are no installation and configuration requirements placed on the Customer.

The app has been designed using Responsive Web Design techniques and is fully compatible with modern mobile and tablet devices.

System availability

We believe one of the core benefits and strengths of the PlotBox cloud offering is the ability to react to changing business needs or service incidents quickly and reliably with minimum impact to operations.

Due to the clustered nature of our cloud service, it is possible to deploy most system changes without requiring any service downtime or client involvement. We implement rigorous automated testing techniques at unit, integration and acceptance testing levels to achieve maximum coverage and provide confidence in the quality and production-ready status of our software.

Our upgrade and deployment processes are fully automated and are taken through and proved in several environments (development, system, pre-production) repeatedly. Continuous Integration and Delivery techniques and processes are followed to ensure that only production-ready code is in our master code branch at any time.

Our cloud infrastructure is continuously monitored and reported on using Application Performance Monitoring (APM) software allowing us to proactively manage SLAs and immediately react to service reduction.

In addition to the SLA, PlotBox's architecture is such that we make use of multiple servers and availability zones to limit the impact of single-server errors. We would treat the unavailability as a Priority 1 incident and this would be managed appropriately.

Core service hours of operation and maintenance windows will be agreed upon between the client and PlotBox to ensure the stability and consistency of the service. The Customer will be allocated a dedicated service manager who will coordinate and communicate system changes or required downtime. For larger or more invasive system changes a staging environment will be provided to enable clients to perform pre-production testing before the upgrades are rolled out to the production environment.

PlotBox shall use reasonable commercial efforts to ensure that the Software is available to you at least 99.5% of the time in any calendar month during the Subscription Term, excluding Scheduled Downtime and Maintenance.

Support

Supporting our clients is a top priority for PlotBox. During the project implementation phase the Customer will be assigned a dedicated project manager to see the project through to handover and go-live. Throughout the test period and after go-live users will have high-level access to our Support team who reports directly to our CTO as well as be appointed a Customer Success



Manager. The team is backed up by the use of industry-leading software tools for the management and control of support tickets, SLA and incident resolution.

After implementation, PlotBox will provide online support logging, monitoring, tracking and escalation system. The online logging can be carried out by the user within the software by clicking on a 'Help' button. The ticket will then be created and Plotbox will monitor and track the issue until resolved. Standard support will be provided during the hours of 9am and 5pm Monday to Friday and our average response time is between 2-4 minutes. Additional Service Hours are available at cost.

Users will also have access to an external Support Portal which can still be accessed in the unlikely situation that the PlotBox application is unavailable.

Where necessary, the PlotBox Support team will offer Phone/Teams/Zoom support calls to discuss tickets. Direct Phone Support for ticket logging is reserved for as a last-resort.

Problem escalation & response times

We will provide a clear designation of support request types, priority levels and target response times within our Service Level Agreement (SLA)

Priority	Target Response time
Critical	1 hour
Severe	3 hours
Serious	6 hours
Minor/Query	24 hours

Priority	Classification
Critical	System is not usable for any purpose
Severe	Malfunction impacting critical piece of functionality
Serious	Malfunction impacting non-critical piece of functionality

Priority	Classification
Minor/Query □	Routine advice and guidance request, Documentation deficiency or usability suggestion