



# Service Description

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# 1 Basware Cloud Support

Basware offers a full range of specialist technical, functional, training, project and change management support to our customers in the deployment and embedding of our Cloud services. These specialist cloud services cover the full lifecycles of the service from inception, through setup and implementation to rollout and embedding. Services offered include business case development, implementation, training, supplier adoption and a range of consultancy services that leverage our expertise and the management information which the service collects.

Our Cloud Support services are charged in accordance with the rates shown in our pricing document and SFIA rate card.

The Cloud Support services offered by Basware are described in more detail in this document with the services structured around the following themes:

- **Preliminary Services.** In general, these would be conducted prior to set-up
- **Set-up Services.** Services typically associated with customer set-up. There is a standard set and various extended services
- **Additional Value Added Services** – These could be part of set-up or post go-live and cover a range of procurement, technology, support and supplier enablement services to ensure maximum user adoption of the solution.

## 1.1 PRELIMINARY SERVICES

### 1.1.1 SCOPE AND READINESS ASSESSMENT

The scope and readiness assessment, if chosen, provides acts as a key step in preparing the customer for implementing the Basware service. It reviews the key criteria and requirements for the successful implementation of the service and starts the planning process. The value of the assessment is in the identification of areas that may have been overlooked in preparing for the service, along with the application of lessons learnt to the successful implementation of eProcurement solutions and the linkage in planning between the technical implementation and the realisation of business benefits.

### 1.1.2 BUSINESS CASE DEVELOPMENT

Working alongside the customer supporting them in the development of a business case for implementing the service, specifically:

- Business benefits analysis: recognising and maximising the strategic benefits to organisational efficiency from implementing the service
- Options appraisal: completing a full appraisal of options for implementing the service, e.g. as a single standalone solution through to fully integrated with other business systems
- Project funding: review of the whole life charges of the project and ensuring sufficient funding is available and has been allocated



- Project resourcing: understanding resource requirements and ensuring sufficient resources (including skill sets) have been allocated throughout the project life cycle
- Risks and Issues identification: recording, undertaking impact and likelihood assessments, and putting in place contingency measures.

### 1.1.3 OUTLINE SPEND ANALYSIS

Identification and extraction of relevant spend data for a suitable, mutually agreed, period (e.g. the previous financial year) in order to understand the customer's baseline data (starting position). Specific aspects include:

- Transaction analysis: including number of transactions and value of transactions (at line item and order level if this information is available)
- Requisitioning activity: identifying the main requisitioners within the customer organisation
- Supplier lists: including the number of suppliers used in the year and a breakdown of the number of transactions per supplier
- Off-contract spending: reviewing the number of suppliers used for the provision of similar goods and services, and if a local and/or central contract is in place for the specific supply
- Priority adoption lists: for users and suppliers including allocating appropriate timescales.

### 1.1.4 BUSINESS PROCESS RE-ENGINEERING (BPR) OPPORTUNITY REVIEW

Reviewing customer proposals for the modification of the procurement process in order to maximise the potential process efficiencies as enabled by implementing the service. Specific areas would include:

- Mapping current processes: recording the current procurement process for a number of sample procurements
- Reviewing processes: identifying and prioritising the opportunities for process efficiencies
- Mapping new processes: recording the new, more efficient, based upon industry best practice and previous experience
- Measuring improvement: calculating the charge to the organisation of (i) the original process and (ii) the new process, and establishing the potential savings to the organisation of adopting the new processes
- Proposing an adoption timeline: providing a realistic, achievable, timeline for the customer to implement the new processes. (This will need to be aligned with the customer's change management plan).



## 1.1.5 TECHNICAL INTEGRATION REVIEW

Undertaking a review of the business systems in use within the customer and assessing the need to integrate each system with the service. Where a need is identified, to understand the impact of that integration including timescales, technical challenges and cost. Key areas include:

- Business system review: details of the business systems in use within the customer environment (developing the as-is, high-level architecture view)
- Options appraisal: review of the business need for each system to be integrated with the Service
- Recommendation: which systems should be integrated with the Service and the details of that integration (e.g. data transfer points) and developing the 'to-be' high-level architecture view
- Create a project plan: including required resources and timescales
- Charge the integrations: estimate the charge of the recommended integration options.

## 1.1.6 CHANGE MANAGEMENT REVIEW

A review of the proposed changes as a result of implementing the Service, and a recommended strategy for a successful change management programme. Key areas would include:

- Understand the degree of change likely to affect the customer and the likely attitude and willingness to accept such change prevalent within the customer community
- Identify the likely inhibitors to change evident within the organisation (e.g. culture, organisational structure, communication methods etc.)
- Identify key stakeholders: recognising the impact of the changes on each stakeholder or stakeholder group
- Create an outline Change Strategy for the organisation and identify the probable change agents within the effected organisational units
- Create a communication plan: taking into consideration the project timescales and priority user and supplier adoption lists.

## 1.2 SET-UP SERVICES

Setup services are offered in a variety of ways from:

- Start up fee based turn key setup
- Express delivery model
- Packaged delivery model
- Enterprise delivery model



The following provides an indication of the Set-up Services that customers receive should they purchase a packaged based service from the Service Provider as part of the Specialist Cloud Services under this Agreement. By necessity it is an indicative example and set up services are subject to scoping based on overall make-up of the services selected.

## 1.2.1 PACKAGED SET-UP SERVICES

Basware bases its packaged delivery on using standard functionality, with the set up project run in accordance with its own project methodology that is aligned with best practice project management. The approach is built around a waterfall model and has the following phases:

- Planning and Definition
  - Project kick off
  - As is process workshop
  - Functional design workshop
  - Integration workshop
  - Detailed planning
  - Production of design documentation
  - Production of scope statement
- Build
  - Provision organisation footprint
  - Configure solutions
  - Establish integration
  - Unit testing
- System Test and Training ○ End to end system testing ○ Train the Trainer training
- Customer Acceptance Test ○ Support customer acceptance testing
- Production and handover
  - Move to production
  - Early life support
  - Handover to business as usual
- Close
  - Lessons learnt
  - Closure report

These phases are supported by project management and where selected supplier activation services are provided in parallel. Where project management includes:

- Project and resource planning



- Project reporting
- Weekly checkpoints
- Risk and issues management

## 1.2.2 ADDITIONAL SET-UP SERVICES

The following is a non-exhaustive list of typical additional services that can be provided during set-up. They may be required by the customer as part of the set-up, dependent on the scope of the project and resources at their disposal.

- Additional process workshops
- Additional functional and technical design workshops
- Production of customer specific test scripts
- Development of end user training materials
- End user training
- Provision of support outside of core business hours

## 1.3 ADDITIONAL VALUE ADDED SERVICES

### 1.3.1 SERVICE ENHANCEMENTS

Scoping, designing and delivering new cloud products that either enhances the Basware Commerce Network or provides complementary apps. The service includes all elements from problem scoping to delivery and into operations.

### 1.3.2 ADVISORY SERVICES

The following provides an indication of the advisory services that customers can purchase from the Service Provider under the terms of this Agreement. It is a non-exhaustive list:

- Procurement advice and guidance: Through conducting a review of procurement operations and strategy make recommendations for improvement, efficiency savings and effectiveness
- Shared Services advice and guidance: Drawing upon experiences from working alongside shared services and through utilising resource who have been part of establishing and delivering such services Basware can provide advice and guidance around shared service centre design, implementation and optimisation
- Business process engineering. The reviews of procurement processes / practices, revision of processes / authorisation levels / budget management responsibilities to seek to ensure that customers gain better value from the Service and embed change within their organisations



- Supporting the customer to embed procurement process change in their organisations. This could include, for example, the provision of advice on optimal organisation design and policy as well as services to deliver extra training or demonstration sessions.
- Category-spend analyses (one-off or on-going): The provision of support to analyse procurement spend patterns to help identify process or procurement spend efficiencies and savings to inform the development of any strategies and policies
- Performance management and benefits realisation support. The provision of advice, guidance and support to organisations in the delivery of benefits or the acceleration of benefits delivery from the use of eProcurement systems and services

### 1.3.3 FIRST LINE SERVICE DESK

A second line helpdesk service for customers is included in the charges for certain services, for example Purchase to Pay, eMarketplace and eRFQ. This is provided on the basis that the customer will have its own 1<sup>st</sup> line helpdesk that will be the first point of contact for all users. The customer's 1<sup>st</sup> line helpdesk will be responsible for fixing simple problems such as password resets and provide the users with support for questions regarding the use of the service as well as basic fault resolution.

The Service Provider also offers a 1<sup>st</sup> line support service for customers as a specialist Cloud support service where they are unable to provide their own or they require additional support for their existing helpdesk facilities.

### 1.3.4 SYSTEM INTEGRATION

The Service Provider can provide additional bespoke integration/ interfacing to departmental systems typically using an integration hub, which can be hosted and maintained by the Service Provider. Examples of the types of integration include:

- Integration of purchasing and finance systems forming part of customer systems where they cannot use standard interfaces
- Integration of finance systems forming part of customer systems where these systems do not deliver the level of functionality or integration required by the customer
- Integration of Buying Organisation Systems direct to supplier back-office systems
- Integration of non-procurement related systems forming part of the customer's systems into the service environment (for example asset management systems).

### 1.3.5 TRAINING

Customers may require specific additional training courses that are outside of that already provided as part of the services, for example where a customer wants to run a series of training events in certain geographical location or for specific groups of users.





Additional training support is available to customers during the provision of services or as they continue to roll out the service across their organisation.

The charges for the additional training provided will be calculated on a case-by-case basis based upon:

- The number of training days required
- The facilities available to deliver the training
- The location of the training
- The preparation required for the delivery of the training courses.

Bespoke training courses and material can also be developed. The charges for this will be calculated on a case-by-case basis.

### 1.3.6 THE CATALOGUE CONTENT MANAGEMENT (CCM) SERVICE

The following Specialist Cloud Services are available to customers:

- Additional Category or Catalogue Views after initial Set-Up. Category Views or Catalogue Views control which items can be accessed by End Users. Super Users can set up Category or Catalogue Views on a self-service basis
- Development of new features in the CCM
- Customised Catalogue Approval Workflow: Customer specific catalogue approval workflow beyond the standard template
- New Export Formats. Customer specific exports for external system interfaces (ERP Item Master)
- Supplier Toolkit Customisation: Customer specific changes to the Toolkit for use with Suppliers
- Modify Email Notifications: Customer specific modifications to the email content and triggering events
- New Import Formats. Customer specific imports for non-service external system interface (ERP Item Master)
- Custom Classification System Implementation. Implementation of Non-UNSPSC in the CCM Portal
- Add additional attributes to Item Descriptions. Adding new item attributes to the CCM Portal

### 1.3.7 ANALYTICS / MANAGEMENT INFORMATION SERVICES

The following Specialist Cloud Services are available to customers:

- Custom Report Development: Software development to create customer specific reports in the analytics or management information suites



- Bespoke reporting (on an on-going or ad-hoc basis): The development of bespoke queries (that are over and above the standard service related reports) where data is extracted and provided off line

### 1.3.8 XML CONVERSION

The following Specialist Cloud Service is available to customers:

- Message Transformation: Conversion of XML Messages to standard message type (initially cXML) from external systems (example CBL to cXML Purchase Order).

### 1.3.9 THE SERVICE SECURITY INFRASTRUCTURE

The following Specialist Cloud Services are available to customers:

- Set-Up of RSA Secure ID Tokens: Set-Up of Secure ID Tokens within the Single Sign On service
- RSA Secure ID Card and License: Monthly fee, payable on a per user basis, for the use of the Secure ID Token

### 1.3.10 SUPPLIER ACTIVATION SERVICES

Indicative list of supplier activation services that customers can purchase:

- Supplier Adoption: A programme of supplier adoption events supported by the Service Provider to assist adopting Suppliers during the set-up of the service
- Bespoke Supplier Adoption: Customer specific supplier adoption services. For example, where a customer wants to run a series of bespoke supplier adoption forums for suppliers in a certain geography or for a specific industry sector

## 2 Pricing

A separate pricing schedule is attached.

## 3 Ordering and Invoicing

The system suggested in the G-Cloud Services Framework Agreement is consistent with Basware's existing Ordering and Invoice process.



Basware's services are such that they can be called off from the Government Procurement Service Vehicle in accordance with the Framework. The Example Order Form will contain details relating to the call-off including:

- Basware and client details
- Term
- Location
- Details and scope of the service including provision for testing and monitoring
- Customer and supplier responsibilities.

At point of call off the payment profile and method will be documented and as part of the process

Basware's company details would be supplied in order for them to be set up in the client system and client invoicing details (including a Purchase Order number) would be registered at Basware, along with the client contact and payment trigger details (e.g. live service demonstration).

## 4 Termination Terms

Basware understands the Term and Termination clause set out in the Framework Agreement.

