

G-Cloud15

Access Procure

Wizard

Service Definition

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1 Service Overview

Access Procure Wizard provides a highly configurable end to end hospitality focused purchase to pay and kitchen management software solution. It's cloud-based software, links seamlessly with a wide range of suppliers within the Access Procure Wizard Portal. Each Supplier is responsible for maintaining, price files, product, allergens and invoices. Whilst allowing appropriate General Ledger coding and authorisation processes allow for complete automation of purchase order to payment effectively reducing time spent on data capture, create digital versions of each invoice for reduction in manual storage and movement and reduction in costs over - price file management - gross profit/cost of sale - wastage and increased credit capture.

The Software contains many key features that allows an operator to manage and control a variable array daily tasks, cost control processes and inventory and menu management.

Below is a summary of the key system features:

Accessible to users globally

Access Procure Wizard can be accessed by unlimited users, with access to the internet via a simple log in process. Users can be added quickly by an administrator and their access level is easily managed by user roles.

Purchase to Pay

The purchase to pay module allows to engage directly with any given supplier through

- Full System – Supplier is completely onboarding and responsible for Products and Invoices
- Self-Managed – The Supplier is partially engaged with the purchase order process however products & invoicing is maintained completed by the purchaser
- Adhoc – Completely manual purchase order process with invoice capture facility to allow for paperless purchase order management

This allows the purchaser to utilise

- Best price practices and alternatives for exact or similar products
- Cross reference matching between approved purchase order – delivery confirmation – invoice completion. In the result of a failure through the matching process, Access Procure Wizard will automate a credit resolution and maximise credit capture. Once complete Access Procure Wizard will complete the Invoice and move to payment export that will manually or automatically update any given accounts package for payment.

Spend and Budget Management

All spend is automated into a flash spend tracker, this allows any given purchaser with role permissions to view spend vs revenue vs budget and gauge how the business is performing, with proactive/reactive responses required to maintain a profitable business. Automation to third party EPOS/PMS systems are advised to streamline.

Menu & Dish Management

Products, prices and allergens fully automated which allows the menu management system to be streamlined and accurate with real time data. Build recipes into dishes and allocate to the menu structures to gain control over.

- Projected spend and consumption
- Projected profitability and shortfall
- Estimated sell price analysis for dish or complete menu
- Allergen breakdown and high level overviews
- Nutritional values
- Detailed spec breakdown with images and media links
- Critical Control Points and Preparation Fields
- Live links to production and depletion in stock values

Time and Attendance

Utilises one point of data entry for forecasting and revenue to create scheduled with time recording, update shifts automatically with predefined patterns whilst allowing a team member to cross over multiple rotas and cost centres. Define the rules from screening and training with compliance to restrict any persons rostered without defined permission. Ultimately giving control, visibility, projected costs, scheduled/unscheduled absence and clear time keeping facilities

Stock Management

Provides the ability to auto populate store rooms/outlets with purchasing, transfers, wastage and sales. Live links to EPOS/PMS will allow for stock depletion within PLU matching from Menu Management, creating reports of variance, deficit, consumption and allowances. The system utilises stock periods to automate delivery points and stock taking procedures

Additional Modules

Contract Management

- Store and manage a repository of contractual agreements and timelines of termination and renewal within groups and roles
- Capture all invoicing from Ad hoc and Self-Managed suppliers within a scanning/PDF process. Automating the approval points and streamline the process to payment

Laundry Management

- Gain control and visibility of laundry stock and costs within the building and supplier. Project stock elevation and replacement costs with a variable configuration of requirements from specific suppliers.

Waste Management

- Report on waste from purchase – production – complete dish. Configure reasons, locations and specific products to gain visibility of peaks and tofts with a given time frame and take proactive responses to reduce wastage within each business

Reporting

The system contains extensive reporting on all areas of the system. All reports can be exported to excel.

Feature key reports such

- Accounts export – finalised Invoices ready for payment
- Accruals Export – any cost implied in a particular period that has been approved to complete, yet not exported
- Goods Purchased – detailed breakdown purchasing for tender analysis
- Spend Analysis – real time spend per unit – department – user – supplier etc
- Material Variance – balance what was order vs what was paid without resolution of credit
- Supplier Share breakdown - best purchasing practices
- Order Audit - Statement – full breakdown of each order with current status

APPs

Included within Workspace are product specific apps, these take some of the commonly used areas of Access Procure Wizard and expose them within workspace for each access and usability.

APIs - SFTP

Integration to third party and internal Access products are configured as and when required with bespoke specifications and time frames built to the customer's requirements.

2 Onboarding

We aim to provide you with an excellent experience in getting up and running. Our Implementations packages range from small site implementations using our rapid FlightPath Implementation packages right up to larger solution projects where we would use our Access Implementation methodology. For the set-up process to be as successful as possible, we need to work together to achieve this.

Access FlightPath

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e-learning, so your users can learn our products at their own pace.

Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote customer projects.

Each FlightPath implementation programme from Access follows a well-defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

Clear roles and responsibilities

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

Your onward journey

Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team.

The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

Full details of our Flightpath implementations for Access Procure Wizard can be found [here](#).

3 Additional Service Options

On top of the services included within the standard FlightPath packages, the table below highlights the additional value added services that our consulting teams can provide. Please take some time to review these.

Additional Services and Training On top of the services included within the standard FlightPath packages, the table below highlights the additional value-added services that our consulting teams can provide. Please take some time to review these.

- **Site User Training** Basic training for end users of the system via remote web session. To include raising orders, delivery and invoice reconciliation.

- **Financial Training** Training for finance team on invoice reconciliation, credit resolution, accruals and accounts export and daily finance tasks
- **Superuser Training** Training for Administrators to include managing users, spend limits, product markets, suppliers and system settings.
- **Remote Consultancy** Additional remote consultancy as required, this may include additional assistance throughout the project, project scoping or additional check in sessions.
- **On-site Consultancy** Additional on-site consultancy as required, this may include additional assistance throughout the project, project scoping or additional onsite training sessions.
- **System Migration** Duplication of existing setup to other portal normally following change of ownership
- **Margin Controls and Stock Analysis** System audit and consultancy on stock results and guidance. Consultant will provide audit and suggested actions for margin control
- **Menu Dish and Recipe Building** Bolt-on module for direct product ordering from suppliers from a pre-agreed catalogue.
- **In House Maintenance** Complete spec sheets for menu for consultant to build remotely. Number of dishes quoted on requirements and menu built to specification
- **FlexPoints** Access FlexPoints are a cost-effective, flexible way to easily access and consume value added services including customisation, training, integration, analytics or reporting, as your business needs evolve.
Access FlexPoints provide a simple way to create an allocation of points that you can call on at any time to spend on Access services. Having a banked allocation of FlexPoints provides the reassurance that as your business needs evolve you can use them to extend and modify your use of the technology.

4 Service & Support Management Details

Providing you and your users with a high level of incident support is of prime importance to us. As well as being able to answer your queries, our support staff will also be able to inform you about the latest software releases, and provide hints and tips to ensure you are getting the most out of your product. To emphasise the importance of support to Access we have over 500 employees in the UK in our Support and Customer Success functions.

Support Commitment

We recognise that the systems, software and services we supply may be critical to the well-being of your business. Our aim is to ensure that you have continuous operational capability from our products. We will help you to achieve this by providing efficient support, resolving the majority of tickets at first-line contact.

We will help you maximise your return on investment by providing the best in technical assistance, advice and customer care. We own your support queries and will ensure that they are resolved as promptly and efficiently as possible.

We provide 3 main support plans as detailed below.

The Essential Plan

The online service The Essential Plan is available to all Access customers as part of your license fee and provides you with easy-to-access online support for all your queries, facilitated via our Customer Success portal.

The Standard Plan

Get answers faster

As a Standard Plan customer you benefit from faster response times and can access our support teams via telephone and live chat, as well as through our Customer Success portal. To help your team be more productive, you are provided with continued access to our e-learning content as well as a programme of Success webinars, designed to keep you up to date with new features and share best-practice advice and guidance.

The Premier Plan

Boost productivity with direct access to the experts and achieve a higher return on investment

Our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your CSM will get to understand how you're using the technology and will advise you on how to get more from it.

Full details of our Customer Success Plans can be found here [Customer Success Plans](#).

Get to know our knowledge base

Knowledge Base is our huge database of commonly asked questions, articles and videos. All you need to do is Register and Login and you can find the answers you need any time of the day.

The advanced search function not only searches articles from Knowledge Base, but links up with our Community hub to display the topics that you need. So you've got everything you need all in one place.

Can't find the article to answer your question? Not a problem. Each article links to our Community so you can ask a question, or to raise a case with the Access team.

Got a question? Ask our Community

Community connects our customers together to help them solve problems and share how to get the very best out of their Access products.

Our customers know more about using our products in their jobs than anyone else. Community gives you the chance to receive – and share – friendly expert advice that goes beyond normal customer support. Discover best practice hints and tips from peers in your industry to help you make the most of your experience with your Access product.

Each of our products has its own dedicated Community, so you can get straight to the discussions that matter to you. No unnecessary searching needed.

If a question can't be answered by Community a member of the Access team will reply. We'll make sure that no query goes unanswered.

5 Account Management & Customer Success

With over 160,000 customers using products supplied by the Access Group we have a large team involved with ensuring that our customers are able to build on their investment with Access.

This includes the Customer Success team who are specialists in specific products whose role is to ensure that our customers on Standard and Premier Success plans benefit from educational webinars to ensure that you are always taking advantage of new functionality and most importantly continuing to adopt best practice in the day to day use and set up of the software.

Our Account Management team work with our customers specializing in vertical sectors or specific products. Depending on the complexity of the customer these are either office based using the latest technology to provide our customers with the highest possible levels of service or will visit sites for face to face meetings.

Our Account managers work with you keeping our customers informed on the way emerging technologies can help their business. They prepare briefings on the business, technical and financial benefits of technology and collaborate with customers to ensure the customer is aware of the breadth of software and support that Access can provide.

6 Outage and Maintenance Management

Outage Reporting - Customers can subscribe to email alerts giving updates on scheduled maintenance and outages. We also provide all our customers with a live dashboard so you can also review uptime statistics.

Maintenance Management – downtime due to maintenance is very infrequent and is run outside of normal working hours with all customers being informed in advance to minimise disruption.

7 Backup and Disaster Recovery

The solution has been designed to cater for disasters ranging from a database restore through to a complete datacentre outage.

All backups are stored on disk and are retained for a period of 12 Months, financial data is kept for 7 years.

Backups are stored within a multi tenancy data vault and are encrypted at rest. The design of the architecture means that all data is simultaneously available in both the primary datacentre and the secondary datacentre meaning data is always backed up to another geographically diverse site.

All Servers are backed up on a daily basis at 10pm. These backups go directly to storage in the DR Datacentre to ensure off-site availability.

Retention for backups:-

15-min SQL	28 days
Daily	28 days
Weekly	3 months
Monthly	1 year for non-financial data /7 years for financial data

The solution has been designed to deliver Recovery Point Objective (RPO) and Recovery Time Objective (RTO) using the following definitions:

- RPO is the maximum time period in which data might be lost.
- RTO is the duration of working time within which data should be restored after a disaster. This time starts from when a support call is logged with Access.

Standard Restore Testing

We undertake a restore test automatically on a weekly basis.

DR Testing

We run a full DR test on a 6 monthly basis, this is a non-invasive test where we bring the DR site up in an isolated fashion to ensure the services recover (Zerto allows us to do this without bringing the production environments down).

SQL Server

SQL Server Full Database backups are taken overnight as well as having SQL transaction logs taken at 15 minute intervals. This allows a database to be restored to an overnight position or to be restored to a chosen point in time within the day.

Frequently a database is restored following a user accidentally changing lots of data so the RPO does not always apply as the user may have changed the data several days ago, however the solution has been designed with a maximum RPO of 12 hours and a RTO of 6 hours.

Single Virtual Machine Failure – IIS or RDS Server

In the unlikely event of a single virtual machine (VM) failing (e.g. the IIS VM ceases to respond but the other VMs are still functioning correctly) then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped

responding. The solution has been designed so that the files on an IIS and RDS server are fairly static with an RPO of 12 hours and a RTO of 6 Hours

Single Virtual Machine Failure – SQL Server

In the unlikely event of the SQL Server virtual machine (VM) failing then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed with an RPO of 12 hours and a RTO of 6 Hours

Complete Primary Datacentre Outage

In the unlikely event that the primary datacentre goes completely dark where all VMs are lost or there is no internet connectivity an investigation period will be undertaken for 2 hours to determine the cause and decide if a datacentre promotion is required to make the secondary datacentre the primary one. Once this decision has been made the solution has been designed with an RPO of 12 hours and a RTO of 12 Hours 'Optional' Customer Copies of Backups.

8 Business Continuity

The Access Group's full and most up to date business continuity plan can be requested by emailing buyer.enablement@theaccessgroup.com

9 ISO27001 Accreditation

The Access Group holds ISO27001:2022 accreditation across the entire organisation. This independently verified certification demonstrates our commitment to protecting your data. Maintaining this accreditation requires us to demonstrate effective security controls, regular staff training, and documented processes that are tested through independent annual audits.

10 Development Life Cycle

As one of our core products Access Procure Wizard has a detailed roadmap of improvements driven both by customers and by our own roadmap. Ongoing development is a combination of new product functionality and bespoke integration work as requested by our customers.

New functionality is added on a regular basis (usually every quarter) with all companies benefitting at the same time.

11 Technical Requirements

Access Procure Wizard runs on any computer or mobile device with a browser and Internet connectivity.

Web Browsers

Internet Explorer 11 and above, Firefox, Safari, Google chrome

Mobile Devices

IOS, Android

12 Service Constraints

Maintenance windows as detailed above are minimal with the service so that we use all reasonable efforts to ensure that the SaaS Services are available for 99.70% of each calendar month.

As a true SaaS solution customisation is not available although the product can be configured to meet all standard set up requirements.