CogniSoft YETI

# YETI for Employability



G-Cloud 15
SaaS Service Definition

# Introduction to YETI

## Functional

YETI is a flexible and user-friendly web-based Client Management System which enables organisations to effectively track, store and manage Participant lifecycles on any kind of Employability or Skills funding stream, all from one single database.

First developed in 1987 for the Job Training Scheme (JTS) and then enhanced for the Employment Training and Youth Training programmes in 1988, YETI now helps Providers of Employment Support to manage their business, both analytically, financially and providing an efficient case management system for their Advisors. During the last four decades, we have amassed a huge amount of industry knowledge delivering YETI to support Employability programmes throughout the intervening years.

YETI now supports a broad range of Employability programmes funded by Government Departments, Housing Associations and Local Authorities. We are experienced in delivering systems to support the needs of businesses with thousands of users, right through to the smallest of providers.

By continually keeping up with changes required by the various Government funding bodies over the years, we ensure our customers remain fully compliant with programme requirements, whilst always including the flexibility to handle Local Authority programmes, private funded provision and unique or custom contracts.

YETI has been designed with the Advisor at the heart of the system making data entry as easy as possible, promoting full and accurate data recording.

**3 Million**

**individuals currently supported by our platforms**



# Key Features

- **Manages multiple programmes**, enabling Providers to deliver across different funding streams from the same database and track participants across multiple contracts. User licences include access to all contracts within the system where enabled.
- **Unique Concurrent Licensing based on trust** - we understand that at key points in the month you may need to burst through your licence limit – YETI will not lock additional users out of the system ensuring data can be recorded at the busiest times.
- **Flexible and Configurable data entry forms** to mirror programme requirements ensuring ease of use and supporting your programme delivery
- **Funding and Compliance Business Rules** written directly into the application, highlighting errors at the point of Data entry, ensuring accurate data and returns.
- Full management of **Prime and Subcontractor data** from a single database
- **Robust and Configurable Case Management** functionality to support and not drive your business including full intervention recording, Assessments and Action Planning for the Participant
- **Online Referrals** – providing a secure and efficient remote referral into the system from external partners such as Community Centres, GPs and self-referrals
- **Communications Module** – Automate communications to Participants or staff via SMS and email, such as appointment reminders and vacancy alerts
- **Dashboards** – YETI's Dashboards drive user workloads and are created around user roles, for Instance 'To Do' lists for advisors or KPI's for Managers, driving process and delivering vital information on log in.
- **Employer Engagement** and **Vacancy Matching** enabling the full CRM capability to manage Employer relationships and Vacancy details, matching to participants based on geographic and job preferences
- **'Participant Self Service' portal** to enable Employability participants to track their journey with their advisors, request and keep track of meetings, job search and resources for Participants in their particular progression pathways
- **Workflow Module** – enabling our customers to design a suite of forms and map organisational processes to system workflow; guiding users through processes and giving organisations complete control of how users engage with the system.
- **Assessment Toolkit** – create custom assessment frameworks and conduct reviews with Participants which can be compared over time to provide distance travelled
- Evidence the impact of community projects, with our Projects and Sessions module; record the aim of a project, target groups and themes, create individual sessions against the project and record the outcomes to measure project reach
- **Security Groups** to ensure users only have access to the areas of the application and data that their job role requires.
- **Single Sign on** – CogniSoft can offer users further security by offering Multi Factor authentication or Single Sign on to log in to applications with just one touch
- **Full reporting** via our report suite or custom developed reports. PowerBI reporting is supported.

Prices for the features above can be seen in the cost tables

# Updates and Roadmap

Twice monthly system updates are provided as a part of the support contract, with no extra costs, to keep the system up to date with statutory changes, funding compliance and functionality.

Our Roadmap includes functionality improvements identified by the CogniSoft team in response to technical advancements or customer driven requests; either directly submitted by the customer through their Account Manager, the Support team, or raised through the User Group.

### Architecture

YETI is a pure web-based system, requiring no additional software or hardware, users access the system via a modern chromium browser. CogniSoft have been providing systems over the web since 2001 with security at the heart of our applications, as well as maintaining Cyber Essentials Plus, we were first certified to ISO27001 in 2011, providing us with a mature and stable ISMS; we are experts at providing secure, reliable client management systems.

Working in an Agile development environment enables us to update the application every 2 weeks providing changes quickly where needed, essential when keeping up with changes to funding or compliance rules.

Our database is Microsoft SQL Server which offers high levels of performance, scalability, availability, and security for our applications, in combination with Windows Server, this enables us to deliver our applications with lower total-cost-of-ownership than any other database technology.

### API and Open Standards

The YETI service allows and supports easy integration with other systems through XML/web services (SOAP over SSL, RESTful API).

YETI has a suite of web services covering the main application functions and collectively these define the methods required for data exchange between YETI and other data sources.

Crucially, the API connects at application level, so all transactions are validated through the business logic layer to maintain data integrity.

Licences to the API are available as an addition to the main SaaS subscription.

# Security

### Information assurance

As a systems delivery organisation to Providers of Government Funded contracts, as well as many other organisations that deal with sensitive client data, information security and assurance are principal concern and CogniSoft's Information Security Management processes are accredited to ISO 27001:2022 standard (certificate number GB11/83028). and ensure robust vulnerability management within our secure software development process.

### Business Continuity

CogniSoft provide comprehensive backup facilities and routines within the costs of the service.

CogniSoft uses a mixture of backup methods to ensure that data is stored securely in the event of any form of disaster. All backup files are encrypted using customer specific keys.

Business Continuity and Disaster Recovery plans are maintained and are tested on an ongoing basis.



# Service Management

## On boarding

You will be assigned a dedicated CogniSoft Implementation consultant who will be your single point of contact for your implementation. We will develop and agree a project plan based on your requirements and our standard implementation methodology and includes a range of services designed to ensure that your users are able to maximise the benefits of the system.

## Training

We provide the following training:

- Familiarisation training to support initial requirements analysis and configuration
- Train the Trainer training to facilitate cascade training
- Administrator training to empower on-going customisation
- End User training days where required
- Custom Training days such as refresher training
- Reporting and data structure training (custom reports creation and YETI MI Suite)

A typical implementation would be delivered over an 8 to 12 week timescale, but our standard processes enable us to deliver our implementation projects within demanding timescales when required.

At the onset of the project, we advise customers of the processes involved, the deliverables that come out of each project stage and the customer representatives who should be involved ensuring that the right people are assigned at the right time.

Once the Implementation is completed you will be handed over to our support team for Business as Usual and your initial Sales consultant will become your Account Manager ensuring continuity of service for you.

## Data Transfer

Customers can migrate to the service from any other system and in a broad range of formats; from common neutral formats (XML, CSV etc.) through to native formats of all major database technologies. CogniSoft employ a tried and tested data conversion process, consisting of data mapping, data conversion and data testing prior to Go Live.

The data migration requires the customer project team to conduct data checking at each stage, for this service, 4 weeks is a typical duration.

## Off Boarding

A minimum of 3 month notice period for termination is required, to enable us to be able to arrange the preparation of your data to be returned to you, then tested by you within 30 days of the end of the contract. CogniSoft can also provide a Cold Storage option for the storage of end of contract data should this be required.

CogniSoft will produce a custom export routine in a neutral flat file format (XML or CSV etc.) to enable it to be interrogated for audit purposes or transfer to new system. The scope of this and the costs involved will vary according to requirements but should take no longer than 5 days development time. Alternatively, you can extract your data using the reporting tools.

## Pricing

Prices for the YETI Employability SaaS solution can be found in our G Cloud Pricing Document and is calculated based on your requirements.



# Infrastructure

**The YETI SaaS is provided with an uptime performance of 99.96% in a month.**

CogniSoft hosting services are provided in conjunction with a data centre partner, currently Rackspace, in one of their highly secure UK data centres.

All planned downtime is scheduled out of hours.



# Support and Maintenance

CogniSoft provide the same support and maintenance service to all customers. We endeavour to provide a friendly and efficient service and exceed our contract SLA for response times and closures. CogniSoft's customer support service adheres to the ITIL Framework for IT Service Management.

Nominated customer contacts will be able to contact the support team by one of the following methods:

**Direct login** – to CogniSoft's support system, 'Response', and log your issue which automatically notifies our Support Team.

**Email** - the support team via a published email address. Emails are addressed by the first available member of staff.

**Phone** - the Helpline number directly and log a support request over the phone. The call will be routed to the entire support team, and the first available member of staff will assist the caller and deal with their enquiry.

All issues, regardless of contact method, will be recorded in our support ticketing system, Response, any updates to the system will notify the customer contact via email and all nominated customer contacts will have access to Response to log/view and update their tickets.

CogniSoft use meeting software such as Google Meets/Teams/Zoom etc so that any issues can be seen first-hand. This gives our support staff the ability to 'see what the user sees' which is often a great advantage in providing appropriate support. This is not an essential feature of the support channel but is offered at no additional charge.

Please refer to Contract and SLA on the listing with details of response times, commitments & responsibilities.

# Contractual

Our standard Contract and SLA for the service are included in our listing, which gives more complete information, our service is billed annually in advance and will renew automatically unless we receive a termination notice. CogniSoft require 90 days' notice to terminate the service or reduce the number of licences and we will then arrange with you for the return and destruction of your data from our servers in compliance with the UK GDPR

Fees for other services will be charged on an as-quoted basis and will require a purchase order to confirm.

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cognisoft.co.uk | 0161 777 2900 | sales@cognisoft.co.uk