

Insource Limited

Data Academy

Data Management Development Platform

G-Cloud 15

Service Definition Document



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Value Statement

For NHS teams who need to build and adapt data solutions quickly and safely:

Data Academy is a low code platform that accelerates ETL, transformation and app creation on governed data—complete with lineage and development User Interface —reducing delivery time and cost while futureproofing solutions across on prem and in-cloud environments.

Social Value Statement

Skills & employment: A low-code platform accelerates creation of data solutions and gives NHS staff transferable digital skills.

Inclusive growth: Blueprinted architectures and governance help smaller providers and ICS partners adopt best practice without heavy cost.

Net Zero support: Orchestrated, automated data flows reduce unnecessary compute cycles and promote remote collaboration.

Ethical data management: Built-in lineage and controls support NHS standards and Data Protection Toolkit requirements.

Outcome tracking: We will work with you to co-define social value KPIs (e.g., staff trained, automation hours saved) and report them through agreed frameworks.

Service Definition

Data Academy is Insource's enterprise-wide data management development platform that enables the transformation of raw, fragmented, and inconsistent healthcare data into a unified, trusted, analytics-ready asset. The platform provides a comprehensive foundation for high-quality data engineering, governance, lineage, workflow automation, and operational intelligence. Below is an expanded description of each core capability.

Unified Data Ingestion and Consolidation

Data Academy provides a development environment that automates the ingestion of data from multiple clinical and operational systems (e.g., EPR, PAS, Pathology, Radiology, Theatres, Community, Mental Health and Workforce systems).

It supports a wide variety of structured data formats and handles large volumes of data securely and efficiently. The ingestion framework provides and ensures:



- A development environment that significantly reduces the time to value of any Data Warehouse or Management development project
- A set of standards and blue printed architectures that takes the guesswork out of the production of enterprise grade data solutions
- Reliable and repeatable daily (or more frequent) loads.
- Automated detection of new, updated, or deleted records, enabling the processing of incremental data, vastly reducing the processing time of constantly changing data sources
- Error handling, data quality checks, and reprocessing workflows.
- Integration across Trusts, ICSs, and multi organisation environments.

Standards Driven Data Validation and Transformation

Using established NHS England standards and Insources proven UDL logic, Data Academy delivers a development platform that enables the validation and transformation of data into a clean, consistent, and trusted structure. This includes:

- Validation rules for date sequences, mandatory fields, and cross table dependencies
- Deduplication and record consolidation
- Standardised derived fields such as RTT, Cancer, or Diagnostic rules
- Configurable transformation pipelines tailored to local and national reporting requirements

Data Lineage, Governance, and Auditability

Data Academy embeds comprehensive metadata management to support robust governance. Every transformation step—from ingestion to consumption—is fully traceable. This includes:

- Version controlled transformation rules
- Audit trails for data changes and user interactions
- Transparent lineage views for end-to-end traceability
- Governance models aligned to local IG policies and NHS data security standards

Analytics Ready Outputs and BI Integration

Data Academy enables the development of pipelines that prepare datasets optimised for reporting, dashboards, and advanced analytics through native extraction layers. This includes:

- Direct integration to Power BI



- Access to curated data marts for specific pathways (e.g., elective, cancer, UEC).
- Support for external analytics platforms and third party applications.
- Automated updates ensuring BI reports always reflect the latest validated data.

Operational Workflow and Performance Enablement

By providing unified, validated data, solutions developed using Data Academy enable healthcare organisations to shift from retrospective reporting to proactive operational management. Specific capabilities include:

- Daily refreshes of operational datasets for service managers.
- Automated rules surfacing bottlenecks, delays, and data quality issues.
- Enhanced performance monitoring across pathways and departments.
- Faster escalation and resolution of operational pressures.

Features

- Automated ingestion and standardisation of data from multiple disparate systems.
- Comprehensive data validation, quality checks, and audit trails.
- High-performance data transformation engine with configurable, reusable logic.
- Integrated lineage tracking and full metadata management.
- Support for national and local data standards (e.g., RTT, Cancer, Diagnostics, UEC).
- Scalable environment suitable for Trust, ICS, and national-level datasets.
- Power BI enabled offering instant access to unified datasets for dashboards and analysis.
- Secure access controls with role-based permissions.
- Automated updates to reflect changes in NHS reporting rules or data standards.
- Open data access and export interfaces for downstream integration with analytics tools and third party applications

Benefits

- A single trusted source of truth supporting consistent reporting across all teams and systems.



- Better data quality, reduced manual processing, and fewer discrepancies across operational reports.
- Accelerated analytics, enabling more timely decisions in elective recovery, cancer, UEC, and operational performance.
- Improved productivity for BI and digital teams through automated and reusable workflows.
- Consistent, repeatable data definitions across organisational boundaries.
- Proven efficiencies and cost savings through reduced duplication, manual workflows, and local bespoke data work.
- Strengthened governance through auditable lineage, validation logs, and transparent data processes.

About Insource Limited

Founded in 1999, Insource delivers operational and data management solutions to both NHS and private UK healthcare providers and addresses the data unification and data accessibility challenges facing providers globally. With over 20 years' expertise we currently work with most national NHS government bodies and over 60 NHS Trusts and Health Boards assisting with their data management, planning, and reporting challenges.

Strategically our UDL (Unified Data Layer), the result of many years' R&D, forms the foundation for trust-wide data management, Integrated Care System (ICS) insight and control, and partner applications development. Our core Health Data Enterprise (HDE) data management platform, which creates our application-independent UDL, brings data together from disparate systems to provide unified, standardised, single version of the truth for frontline intelligence and effective care delivery and reporting.

We believe that all operational healthcare data should be accessible, unified and useable at local, system and national level. With challenging targets, managers need to recover services quickly, but unfortunately, NHS teams are constantly on the back foot because of incomplete, unreliable, and out-of-date information. We aim to give NHS managers the accurate, near real-time data they need to turn things around. Our powerful data management platform unifies, standardises, and makes accessible operational data from across the service. It creates a single version of the truth, despite the disparate data formats, legacy infrastructure and changing system-wide architecture.

Our applications harness the power of this unified data to extract intelligence, and help you to make confident decisions, and streamline operational processes that improve healthcare delivery for the very best patient care.

Insource have an extensive suite of solutions that cover Data Management,



Elective/Non-Elective/Cancer pathway management, Capacity and demand planning and scheduling and RTT and Cancer e-Learning.

Onboarding and Offboarding Support

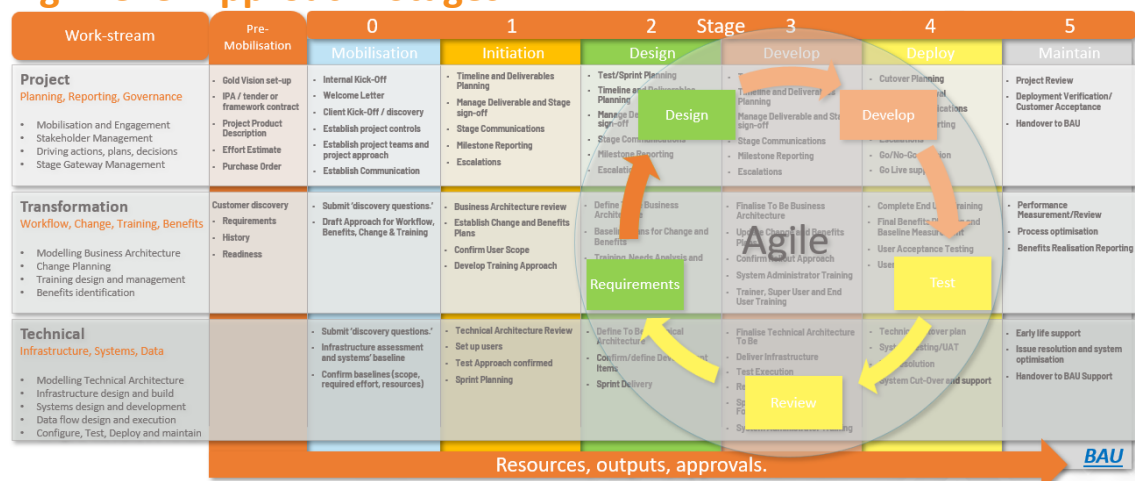
Insource has been working in the UK for over 20 years, with over 60 NHS and other healthcare providers as customers throughout the UK. We have a vastly experienced UK team with decades of combined industry experience supporting customer solutions delivering care at hundreds of healthcare organisations. We combine our experience with a standard delivery approach, our best practice ITIL aligned project delivery methodology called The ISDM Methodology (Insource System Deployment and Maintenance) which is a combination of PRINCE2 processes, controls and governance with an Agile approach to Design, Configure and Deploy.

Implementation Approach

Due to the variable nature of customer projects, we do not provide a standard fee for implementation services, and therefore implementation costs are not included within the pricing document. An initial discovery phase or Scoping Exercise will be carried out to obtain information relating to customer requirements. Information obtained during this phase will be used to agree and price all variable components.

The Insource ISDM methodology supports a standardised approach to the delivery of projects with standard process, tasks, artefacts, resource roles, dependencies, and risks across each stage of the product lifecycle defined by the complexity of the project. The approach includes defined phases, tasks and resources to undertake appropriate design and delivery either in a traditional 'waterfall' approach or through an interactive or agile approach.

High Level Approach: Stages





Training

Training is included as an optional component of the deployment services costs and will be scoped and agreed as part of the Planning and Design phase of the agreed programme or project. Insource works in partnership with its customers and can offer a range of training and materials to facilitate rapid adoption of the solution. All of Insource's solutions are designed to be easy for staff to learn and use, supporting rapid uptake with minimal training.

Training is offered through:

- **Logistix Portal** - online resources providing detailed documentation including Wiki and knowledge base, product downloads, customer forum and query help line for support.
- **Instructor-led** - face to face training with an experienced Insource trainer often at the customer site.
- **Webinar** - instructor-led training with the convenience of a virtual learning environment.

A 'Train the Trainer' approach is often recommended, whereby Insource provides the local team with the knowledge and skills necessary to establish an ongoing end user program independent of Insource resources.

Offboarding

Insource understands the importance of developing a contract exit strategy and plan, and as such, will work with the customer to develop an appropriate exit plan if one is required.

Support Service

Insource provides an industry-standard, ITIL-aligned support service that can be tailored to meet client needs. Our support services include four service levels, operating Monday to Friday, 09:00–17:00, excluding UK public and bank holidays, unless extended or out-of-hours support is specifically requested and agreed.

Standard Support

This level of support is designed for organisations with strong in-house capability to manage their Insource Data Management solution. Pre-requisites: At least two trained client users (HDE – Development & Management) or a minimum of two years live service with at least one year of internal support. Includes: Reactive support via online portal (FogBugz), advice, guidance and



troubleshooting, diagnosis of build failures, fix and workaround guidance, notifications of required upgrades and new releases, and SLAs as per Standard Support. Provided on a fixed annual price, reactive support only.

Enhanced Standard Support

Includes all Standard Support services, plus pre-purchased Time & Materials for additional support activities. Includes: All Standard Support features, flexible call-off consultancy time, scheduled work at standard day rate, and urgent unscheduled requests at a premium rate. Ideal for organisations needing occasional expert input.

Standard Support Plus

Designed for organisations confident in day-to-day operation but requiring regular expert involvement. Includes: All Standard Support services, application administration (users, groups, organisations, workflows, lists), two scheduled configuration audits per year, managed upgrades across test and production environments, and remedial fixes following upgrades. Provided on a fixed annual price, combining reactive and proactive support.

Data as a Service (DaaS)

A fully managed service providing end-to-end operational management of the Insource data platform, designed for organisations that do not wish to manage the platform internally. Includes: Proactive monitoring of data, builds and performance, proactive maintenance and version upgrades, reactive fault resolution and user support, configuration, change management and enhancements, and support for new projects and service expansion. Ensures continuous availability, performance optimisation and data integrity.

Service Levels

Insource shall prioritise all support requests based on its reasonable assessment of the severity level of the problem reported according to the following table:

		Impact		
		High	Medium	Low
Urgency	High	1. Critical	2. Urgent	3. Routine
	Medium	2. Urgent	3. Routine	3. Routine
	Low	3. Routine	3. Routine	3. Routine



And respond to all support requests in accordance with the responses and response times specified in the table set out below:

Standard, Standard Support Plus and Enhanced Support

Severity level of Fault	Definition	Support Response Time	Target Resolution Time (business day)
1	Business Critical Failure: An error in, or failure of, the Insource Software or Products that: (a) materially impacts the operations of the Client's business or marketability of its service or product; (b) prevents necessary work from being done; or (c) disables major functions of the Insource Software or Products from being performed.	1 hour	1 day
2	System Defect with Workaround: (a) a critical error in the Insource Software or Products for which a work-around exists; or (b) a non-critical error in the Insource Software or Products that affects the operations of the Client's business or marketability of its service or product.	4 hours	2 days
3	Minor Error: An isolated or minor error in the Insource Software or Products that: (a) does not significantly affect Platform's functionality; (b) may disable only certain non-essential functions; or (c) does not materially impact the Client's business performance.	1 day	5 days



Data as a Service (DaaS)

Priority Level	Description	Support Response Time	Resolution Time (business day)
Priority 1 (P1): CRITICAL	• Lack of availability of an updated UDL ¹ • Inaccessible UDL	1 hour	1 day
Priority 2 (P2): URGENT	• Severe degradation in system performance affecting all users due to the failure of the Software Products • Connectivity available, but applications not functioning as expected i.e. HDE services. • Data integrity is compromised. i.e., partial data presented, or data is not refreshed as per agreed schedule • Data loading mechanism reports a failure • Custom business rules incorrectly defined • Logical data processing error	4 hour	2 days
Priority 3 (P3): ROUTINE	• Local to national coding mapping incident • Notification of Software Products updates • Requests for updates in user, group workflow and business unit changes • Request for an estimate of Software Product configuration change • Delivery of a two-day Software Product configuration change	1 day	5 days
Priority 4 (P4): SERVICE REQUEST	• Requests for Software Product updates • Requests for additional training • Requests for additional consultancy or new project • Requests for advice on local configuration • Delivery of a Software product configuration change which will require more than a two-	3 days	Variable on reason for request 1 week to 2 months

¹ The fix time for “the lack of availability of an updated UDL” refers to the time taken to resolve the issues attributable to the Software Products and does not include issues which are attributable to the underlying Infrastructure. Also, does not guarantee an updated UDL within the fix period, the supplier will make best reasonable endeavors to make an updated UDL available within the SLA time period, otherwise the UDL will be updated within the next build cycle.



Priority Level	Description	Support Response Time	Resolution Time (business day)
	day configuration as specified in the request for an estimate Incidents/problems caused by items/reasons not supported by the Supplier under the terms of this Contract, including (but not limited to) third party software, network, infrastructure, Authority supplied hardware, etc.		
Priority 5 (P5): PLANNING	Planning Sessions	5 days	No fixed Resolution time. Arranged as available.

Commercial Approach

At Insource we recognise that all customers have different requirements, we work in partnership to ensure that we agree on a solution that meets your individual needs. Therefore, due to the variable nature of customer projects, an initial scoping exercise will be completed to obtain information relating to specific customer requirements. Information obtained during this phase will be used to agree and price all variable and optional components.

Ordering and Invoicing Process

The scope of deliverables will be agreed between the customer and Insource in accordance with specific customer requirements and detailed in the Order Form.

Insource will invoice the customer in accordance with agreed Milestones as per the contract. Payment of invoices will be subject to payment terms as detailed in the contract.

Payment terms

Insources standard payment terms are thirty (30) days from receipt of invoice or as per the terms in the contract.



Contract Termination

Contract termination is offered in accordance with standard terms and process detailed within the contract.

Technical Requirements

The technical requirements of the service will vary dependent on several variables.

- The size of the trust and hence the volume of data to be included,
- The scope of the implementation.

The service can be installed on new or existing server hardware or deployed to a cloud hosted virtual machine with the equivalent specification.

The following server specifications will provide the minimum requirements for a useful implementation of Data Academy. acute trust or Health Board using the service with sufficient storage and processing capability.

The following recommended configurations are subject to initial investigation and are provided for guidance purposes only. Greater data volumes will require a higher specification infrastructure.

Physical Server

Component	Spec	Details
CPU	4 Processor cores	
RAM	32GB RAM	
	3 x 500GB Storage Drives (SSD)	
	Partitioning Details	Drive 1 - Operating System 150 GB Drive 2 - Database Files (*.mdf) 450 GB Drive 3 - Database Logs (*.ldf) 450 GB Drive 4 - Temp DB/Master 450 GB



Software

The following software must be installed and configured on the server to support the Data Academy® components (Supporting Software) of the service :

- Microsoft Windows Server 2019 or better
- Microsoft SQL Server 2019 64-bit (latest service pack) Standard edition or better (All modules installed, full config pre-requisites on request).
- Microsoft Internet Information Services (IIS) 6 (or later)
- Database Mail (included in SQL Server setup) – Required for email notifications only
- Microsoft .NET 4

Please note that the system requirements given above are the minimum requirements for our products and for Microsoft SQL Server. Your overall requirements may be greater depending on the software installed.