
Support Services for Microsoft Dynamics and Power Apps

Service Definition

Cloud Support – Services and Solutions



Contents

1	Overview of the G-Cloud Service	3
1.1	Introduction	3
1.2	Microsoft Dynamics 365 support and services	3
2	Service Management	3
2.1	Project Management	3
2.2	On-boarding	4
2.2.1	Microsoft 365 On-boarding:	4
2.2.2	Bespoke solution On-boarding:	4
2.3	Off-boarding	5
2.4	Training	5
2.5	Solution Service Schedule	5
2.5.1	Future Enhancements to customer solutions	5
2.5.2	Enhancements to the Microsoft Dynamics CRM Online platform	6
3	Backup, restore and disaster recovery	6
4	Support/Service Level Agreements	6
4.1	Support Desk	6
4.2	Service level agreements	6
5	Buying the Service	6
5.1	Trial System	7
5.2	Ordering	7
5.3	Invoicing	7
5.4	Contract Management	8
6	Customer Responsibilities	8

1 Overview of the G-Cloud Service

1.1 Introduction

We customise and support solutions that are uploaded to customer Microsoft Dynamics 365 and Power App environments to help organisations get a real return on investment from their investment in Microsoft Cloud Services and software.

Microsoft Dynamics and Power Apps provide an ideal means to eliminate the typical plethora of excel spreadsheets, legacy applications and isolated databases often found in organisations. By bringing these on to the Microsoft Dynamics and Power App platforms, data can be consistently stored, easily shared and integrated, made more secure and be easily managed by ICT teams.

Benefits of using Microsoft Dynamics and Power Apps are:

- Recognised accreditations for Cyber Security
- Common technology backed by Microsoft.
- Integrates with Microsoft Office and third party applications.
- Remote and mobile working on/offline
- Improve data sharing and management.
- Easy to build dashboards and views.

1.2 Support and services

Drive your digital transformation with Active Informatics and Microsoft Dynamics and Power Apps. Grow, evolve, and transform every part of your business to better meet the changing market and needs of your customers. This is a customisation, configuration, integration and migration support service that will deliver a complete Microsoft Dynamics/Power App solution to meet your needs.

Active Informatics Ltd have created Microsoft Dynamics and Power Apps for many organisations including education and training providers, emergency services, membership associations and councils.

2 Service Management

2.1 Project Management

Active's preferred development approach for this support service is to follow the respected Agile methodology to deliver services. We believe that this approach results in a faster project, a better product and a solution that customers more easily adopt and use once it goes live. The approach breaks down design and development activities into defined, manageable work streams and not only enables progress to be tracked easily but also enables the customer to be involved regularly and often in shaping the solution as it evolves within in agreed budget and timescale deadlines. It also provides the opportunity for Active to continually adopt processes and functionality to ensure the most efficient outcomes.

An allocated Project Manager and Product Specialist will lead every project.

2.2 On-boarding

There are three elements to the on boarding process. The first is setting up your Microsoft Dynamics and Power App system environment, the second is uploading an appropriate (if applicable) managed solution and the third is working with Active to configure and customise your final system.

2.2.1 Microsoft 365 On-boarding:

Active will assist you to setup and access Dynamics and Power Apps through your Microsoft 365 account in order to access the solution. Once given appropriate admin rights Active will assist you to take the next steps to customise, configure and plan for deployment.

2.2.2 Bespoke solution On-boarding:

Stage 1: Kick-Off Meeting

Following confirmation of the order, this first meeting aims to identify the core Project Team from Active and the client's side; to go through the solutions available and start the process of highlighting where there may be key differences between the processes used in the base solution and those of the customer – and where change may need to be focussed. Initial ICT and data requirements are also touched upon during this meeting. A Kick-Off Meeting preparation document and agenda are supplied by Active in advance of the meeting.

Stage 2: Workshops

This stage involves a complete review of current processes for each of the key engagement areas and the corresponding processes within the base solution. A form and field level review are undertaken, data inputs and outputs are identified, and documentation discussed.

Stage 3: Configuration

This stage involves configuring the solution based on the signed Design Specification – entity structure amendments agreed from the workshops, amending forms and fields, mapping data import/integrations, testing data migration, updating key process flows, defining agreed workflows.

Stage 4: Review Meeting

During this session a full review of the configured solution is undertaken with representatives from each of the key engagement areas, to check that the system has been configured in accordance with the Specification and to achieve 'schema lockdown'. Following lockdown of the schema, the final configuration processes can take place – reports, workflows, templates, security role configuration, mobile device configuration (if applicable) etc.

Stage 5: Business Configuration

This stage covers the design and configuration of the business units and the setting up of the security roles, as well as testing of the import/export routines

Stage 6: Training

This stage is usually split into two sections – System Administrator training and User Training (Train-the Trainer approach). Training will cover: everything around the basic use of the system; using the Outlook client; adding data; explaining where automation has been implemented; using Microsoft Word Templates; Printing; changing views; running basic reports; setting up users; assigning licenses; general administration of importing/exporting data, using the marketing module (if applicable).

Stage 7: User Acceptance Testing:

This is the final process to review the fully configured system to ensure that it meets the agreed Design Specification and needs of the users. All system integrations, document templates, reports, user accounts and roles will have been set-up and working. Formal sign-off of the UAT document will deem the solution fully delivered. Final upload of live data prior to go-live will be the only remaining action.

Stage 8: Go-Live/Post Go-Live onsite assistance

During this phase, a Product Specialist will spend time with the end users/departments to help troubleshoot any issues.

2.3 Off-boarding

The off-boarding process and timeline can differ according to each customer and will be discussed with the customer during the implementation phase.

Typically, the Active customer service team will write to a customer before the end of their contract to confirm the agreement is about to end and to confirm the next steps.

2.4 Training

Training is included as part of the delivery of the service. It is available to licensed users of the solution and is based on the following approach:

- Full System Administrator training to designated 'System Administrator' users
- Train the trainer approach to cover end-user training, to designated client trainers

2.5 Solution Service Schedule

2.5.1 Future Enhancements to customer solutions

Active may provide enhancements to the standard functionality available as part of the solution service from time to time to customers where there is a current Support Agreement in place. These enhancements will be notified to customers by their Product Specialist.

Customers may be required to take these enhancements so that their system remains compatible with the latest release of the Microsoft Dynamics and Power App applications.

2.5.2 Enhancements to the Microsoft Dynamics and Power App platform

Microsoft inform customers and Active in advance of scheduled updates to their Dynamics platform. To ensure that the functionality available within the solution service remains compatible with the latest release/update Active will work with the customer to agree a specific time for the update to be applied, if required.

3 Backup, restore and disaster recovery

With this support service Microsoft and the customer take full responsibility for the backup, restoration and disaster recovery elements for Dynamics and Power Apps application through their own software licenses and UK based data centres. Production backups are kept for 28 days (7 days for sandbox) and are available within a customer's Microsoft 365 tenant environment.

Microsoft 365 tenant provides the facility for customers to implement their own data retention policies. All data is replicated from a primary data centre to a secondary data centre. There is not a specific backup schedule as replication is continual. Customers can choose to perform their own extractions/backups if necessary.

Customer data is stored in a redundant environment with robust backup, restore, and failover capabilities to enable availability, business continuity, and rapid recovery. Multiple levels of data redundancy are implemented, ranging from redundant disks to guard against local disk failure, to continuous, full data replication to a geographically dispersed data centre. An annual validation of backup/recovery procedures is performed.

4 Support/Service Level Agreements

4.1 Support Desk

Access to support is available to designated customer users, typically System Administrators, to report issues or to seek advice/guidance. Our standard support includes unlimited access to the support helpdesk via:

- Email
- Telephone
- Microsoft Teams

The support helpdesk is available Monday to Friday, 9am to 5.00pm – excluding English Bank Holidays/Public Holidays.

4.2 Service level agreements

The following support service fault definitions will apply and only relate to solutions, customisations and integrations under the complete control of Active Informatics Ltd e.g. issues and incidents caused by third parties cannot be covered:

- Priority 1: entire Software solution or critical business function is unavailable resulting in a direct impact on the ability of the Client to use the Software;
- Priority 2: a non-critical business function is unavailable resulting in a direct impact on the ability of the Client to use the Software;

- Priority 3: a non-critical business function is unavailable but does not have an impact on the ability of the Client to use the Software.

The following SLAs will be applied:

- 1) Technical response to initial fault notification: 12 working hours; will include the raising of a formal Support Case and issue of Case ticket number;
 - Priority 1 fault: fault diagnosis and assessment within 4 working hours following formal notification of a Support Case to appropriate Contractor personnel;
 - Resolution within 8 working hours, following formal notification of a Support Case to appropriate Contractor personnel;
 - Priority 2 fault: fault diagnosis and assessment within 12 working hours following formal notification of a Support Case to appropriate Contractor personnel;
 - Resolution within 24 working hours following formal notification of a Support Case to appropriate Contractor personnel;
 - Priority 3 fault: fault diagnosis and assessment within 12 working hours following formal notification of a Support Case to appropriate Contractor personnel;
 - Resolution within 30 days following formal notification of a Support Case to appropriate Contractor personnel or as part of the next scheduled release of the Software if a change to the Software is required.
- 2) Microsoft Dynamics or Power App software fault escalation: upon confirmation that the fault resides with the underlying Microsoft Dynamics or Power App software or any other third party and not the customised Solution or services provided by Active Informatics Ltd, the Contractor will:
 - Confirm to the Client that the fault resides with the underlying third party e.g. Microsoft, and provide best endeavours to help resolve it.

5 Buying the Service

5.1 Trials

A chargeable trial is available to potential customers to see what our services can deliver but only after the users have received instruction from Active Informatics Ltd regarding requirements and to provide training. This is to ensure they get the most from the trial and have a good understanding of the example workflows in place. A trial will run for between one (1) to five (5) days and will involve all stakeholders signing a non-disclosure agreement (NDA).

5.2 Ordering

If a trial is successful, or a customer wants to order the service without undergoing a trial, the customer will discuss with Active the order requirements – including the number of users, any specific customisations required and any specific integration or migration requirements. Active will provide a confirmation of the order, including full costings. The customer will be required to supply a Purchase Order covering the cost of the entire contract will need to be raised and sent to Active. Once this has been received an invoice(s) will be raised in advance of work beginning and the customer success team will automatically begin the on boarding process described in section 2.2.3.

5.3 Invoicing

Costs are paid upfront annually and our standard terms of payment for invoices are 30 days from the invoice date.

5.4 Contract Management

The minimum contract period is one (1) year, with the option to extend for multiples of 12-month periods in line with G-Cloud terms and conditions. Customers must provide notice of termination in writing, as per agreed contract terms.

6 Customer Responsibilities

The responsibilities placed on the customer for a successful implementation are minimal. Their responsibilities are:

- The customer will need to indicate the preferred choice for data migration and integration. Any data exports will be provided in a format agreed by all parties.
- Nomination of an internal project lead and champion to act as a main point of contact for Active Informatics Ltd with authority to make final decisions.
- The creation of an internal project team
- To meet actions and obligations as set-out in the implementation and project plan
- To provide access (remote), to appropriate staff from Active, to all data and systems related to the implementation and required to complete the project.
- Facilitate regular meetings between Active Informatics Ltd and Customer senior management to review project performance.

7 Decommissioning the system and Data

Active will write to all customers 30 days before the end of their contract to confirm the date we will decommission managed solutions that have been licensed to the Customer from Active Informatics Ltd. All managed solutions will be permanently removed by Active Informatics on an agreed date. A copy of all the customer data in the system will be provided to the customer in a secure format.

8 Technical requirements

In order to access the system, users need a secure internet connection and the latest version of either Edge or Chrome web browser installed on their device. Mobile and tablet devices will require the latest version of Android or iOS and be able to download the latest Microsoft Dynamics or Power App app. The system supports multi factor authentication (MFA).