Support Services for Microsoft Dynamics and Power Platform

Service Definition

Cloud Support – Services and Solutions



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1 Overview of the G-Cloud Service

1.1 Introduction

Active Informatics provides professional consultancy and implementation services for Microsoft Dynamics 365, Power Platform and Microsoft 365 environments.

Our services help organisations design, configure, implement, integrate, migrate and support business applications built using Microsoft technologies. Pre purchased services are provided on a day rate basis and can be used for things like discovery, requirements analysis, solution design, implementation, configuration, development/customisation, data migration, systems integration, testing, training and ongoing technical support.

We work with public and private sector organisations to maximise the value of existing Microsoft investments through the delivery of secure, scalable and maintainable business solutions.

1.2 Support and services

Active Informatics provides flexible professional services for organisations using Microsoft Dynamics 365, Dataverse, Power Apps, Power Automate, Power BI and the wider Microsoft ecosystem.

Services include:

- Discovery workshops
- Business analysis
- Requirements gathering
- Solution architecture
- Environment setup and configuration
- Application development
- Customisation and configuration
- Systems integration
- Data migration
- Reporting and dashboards
- User acceptance testing
- Deployment and go-live support
- Training and knowledge transfer
- Technical support and system optimisation

Services may be purchased individually or combined into a wider project engagement.

2 Service Management

2.1 Project Management

Active Informatics uses Agile and iterative delivery methodologies to manage professional services engagements. Project management services include project planning, stakeholder engagement, sprint management, risk management, reporting and governance.

Depending on project size, an Engagement Manager, Project Manager or Functional Consultant may be assigned. An allocated Project Manager and Product Specialist will lead every project.

2.2 Onboarding (new solutions only)

Project onboarding establishes project governance, delivery approach, environment access requirements and stakeholder responsibilities before consultancy services commence.

2.2.1 Microsoft 365 On-boarding:

Active Informatics will assist customers with establishing access to relevant Microsoft environments including Dynamics 365, Power Platform, Dataverse and Microsoft 365 services.

Activities may include:

- Tenant and environment review
- Security and permissions assessment
- Environment provisioning
- Solution deployment preparation
- Access configuration
- Technical readiness reviews

2.2.2 Bespoke solution Onboarding:

Stage 1 – Discovery

- Requirements gathering
- Stakeholder workshops
- Current-state review
- High-level recommendations

Stage 2 – Solution Design

- Functional specifications
- Data model design
- Security model design
- Integration planning

Stage 3 – Configuration and Development

- Application configuration
- Customisation
- Workflow development
- Automation development

Stage 4 – Integration and Data Migration

- Data mapping
- Data cleansing support
- Migration testing
- Integration implementation

Stage 5 – Testing

- System testing
- UAT support
- Defect resolution

Stage 6 – Training and Knowledge Transfer

- Administrator training
- End-user training
- Documentation handover

Stage 7 – Go-Live Support

- Deployment assistance
- Hypercare support
- Operational transition

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 services are available as part of any professional services engagement and may include:

- System administration training
- End-user training
- Train-the-trainer programmes
- Process training
- Solution-specific workshops
- Knowledge transfer sessions

2.5 Solution Service Schedule

Professional services are provided on a day rate basis (minimum of 20 days) and can cover anything Microsoft cloud services related:

- Enhancements
- Change requests
- New functionality
- Integrations
- Reporting requirements
- Data migration activities
- Technical consultancy

3 Backup, restore and disaster recovery

Active Informatics does not host customer solutions. Backup, restore and disaster recovery capabilities are provided through Microsoft services and customer-owned Microsoft subscriptions.

Active Informatics can provide guidance relating to backup/restore and environment management.

4 Ongoing Support

Following project delivery, customers may purchase ongoing professional support services delivered on a time-and-materials or pre-purchased day allocation basis.

5 Buying the Service

5.1 Discovery and engagement

Prospective customers may commission a short discovery engagement to assess requirements, review existing systems and produce recommendations prior to a larger implementation project.

5.2 Ordering

Services are purchased using Active Informatics current standard day rate.

Prior to work commencing Active Informatics will agree:

- Scope
- Deliverables
- Assumptions
- Timescales
- Resource requirements
- Estimated consultancy days

5.3 Invoicing

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

5.4 Contract Management

The minimum contract period is 20 days at our standard day rate, with the option to extend 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 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 project 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 Informatics does not retain ownership of customer Microsoft environments or business applications developed on behalf of customers.

Upon completion of services, all agreed project documentation, configuration information and deliverables will be handed over to the customer. Any access provided to Active Informatics consultants will be removed in accordance with customer security policies.

8 Technical requirements

Any Microsoft licensing requirements remain the responsibility of the customer unless otherwise agreed. Active Informatics can provide licensing guidance but does not include Microsoft licences as part of this professional services offering.