Service Definition Document

Vision Response Service (VRS)

Managed Application Service

November 2024

Vision ERP

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1.0 Vision ERP Overview

Vision ERP is a leading provider of tailored solutions specifically designed to meet the unique needs of the public sector. Our team comprises industry-specific experts who possess a deep understanding of both business functionality and system functionality. This expertise enables us to empathize with the challenges faced by public sector organizations, allowing us to develop solutions that are not only industry-specific but also finely tuned to work seamlessly within your environment.

With a focus on delivering transformative partnerships rather than just solutions, Vision ERP has a proven track record of success in working with government agencies and public organizations. Our solutions have consistently delivered increased efficiency, reduced costs, and enhanced transparency.

We prioritize data security and compliance, offering stringent measures to protect sensitive information and ensure adherence to regulatory requirements. Additionally, our comprehensive support and training programs ensure that your team is well-equipped to leverage our solutions effectively, setting the stage for long-term success in the public sector landscape.



Further information can be found on our website: *https://visionerp.co.uk/*

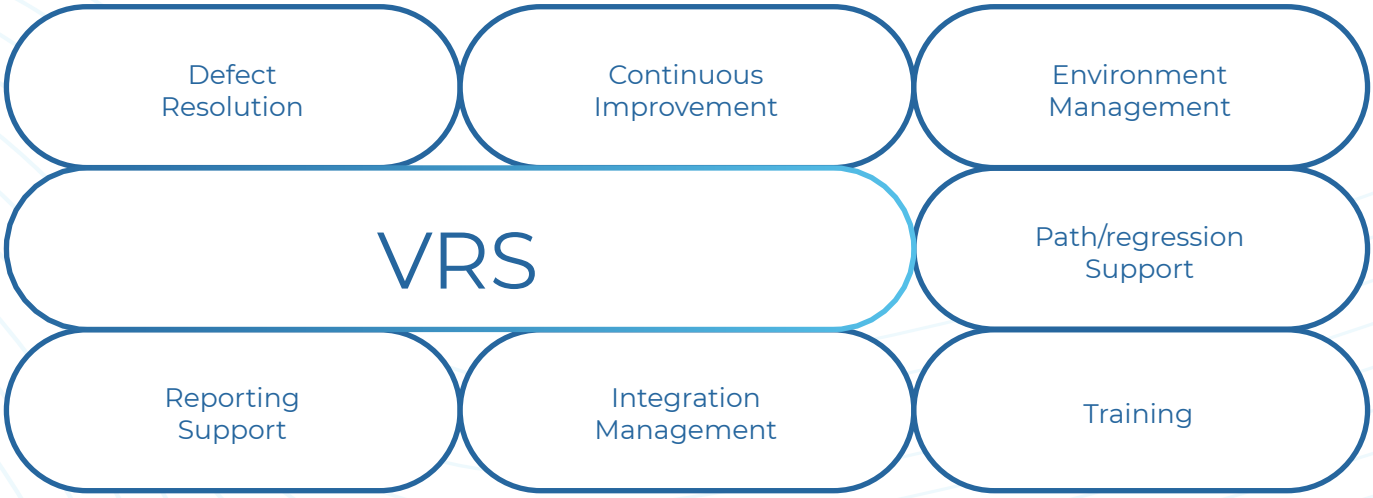
2.0 Unit4 ERP Application Managed Service/ Support (AMS)

Our VRS (Vision Response Service) is a comprehensive managed service offering designed to alleviate the burden of Unit4 ERP administration and development for our customers. With VRS, we aim to seamlessly manage the application, working closely with your organization and software/hosting provider to ensure smooth operation and continuous improvement.

2.1 Our Approach

Under VRS, we adopt a collaborative approach, working closely with your organization to understand your specific needs and requirements. We tailor our governance structure to suit your organization's preferences, acting as a trusted gatekeeper for your Unit4 ERP solution.

2.2 Key Components of VRS



2.2.1 REPORTING SUPPORT

VRS provides comprehensive support for various reporting functionalities within Unit4 ERP, including in-app browser reports, Excelerator, Worderator, and Xtra reports. This support can be accessed either through ticket-based assistance or as part of a bundled service offering.

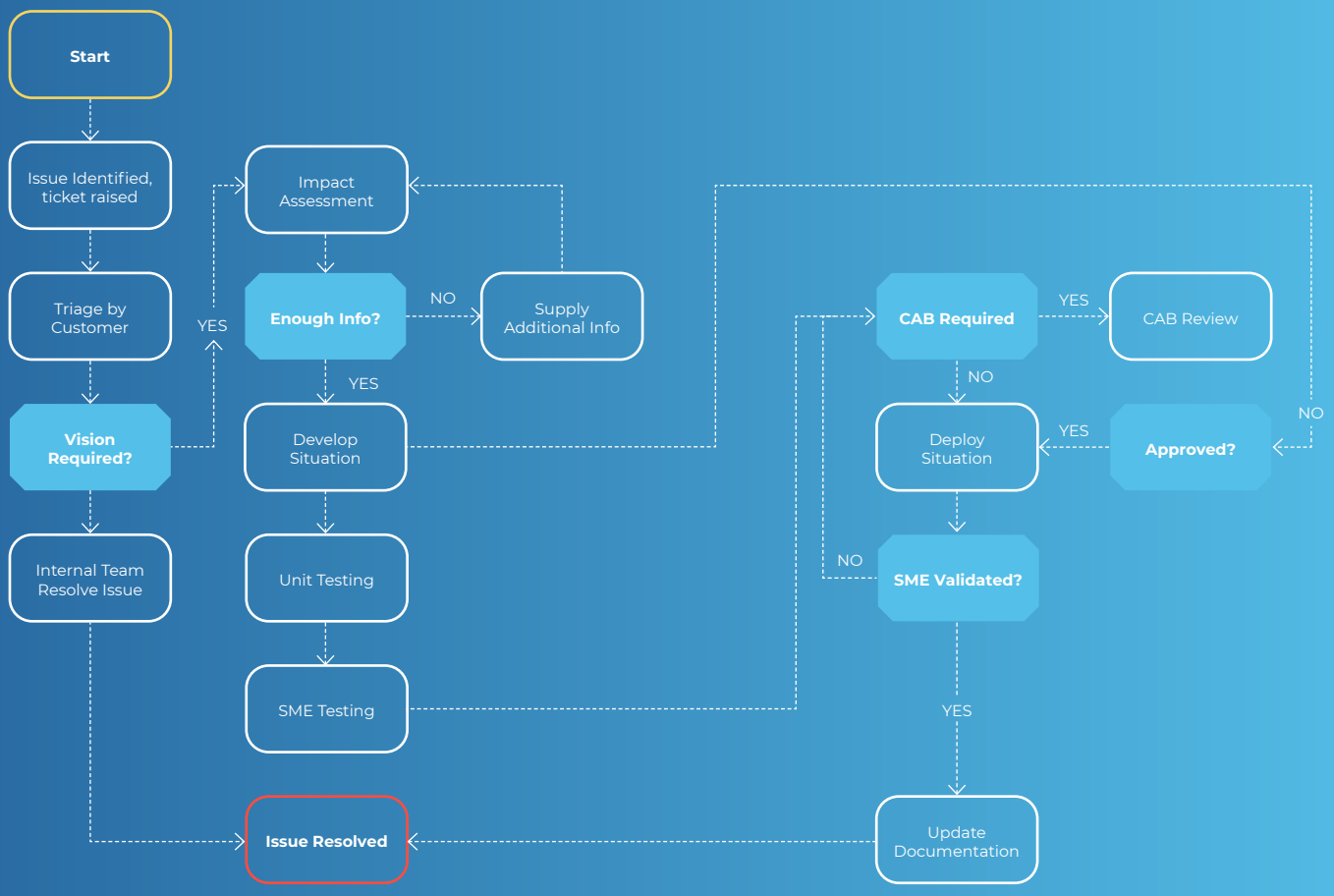
We prioritise the use of supportable tools to ensure your reporting solutions remain future-proofed and adaptable. For reports created using Report Studio-based tools like Excelerator and Xtra, we employ standard ReSQL for retrieving results from enterprise documents whenever possible, preferring it over native SQL. This approach ensures consistency and compatibility across your reporting ecosystem while maintaining flexibility to meet evolving requirements.

Database views are implemented only when necessary, minimizing complexity and ensuring the maintainability of your solution. Additionally, we understand the importance of branding and stationery design consistency. Therefore, we adhere to your organization's stationery design guidelines, incorporating elements such as letterheads and colours appropriately into the reporting outputs.

2.2.2 DEFECT RESOLUTION

Our team is dedicated to resolving any defects or issues that may arise within the Unit4 ERP application promptly and efficiently.

Any defect identified will be resolved using the following process:



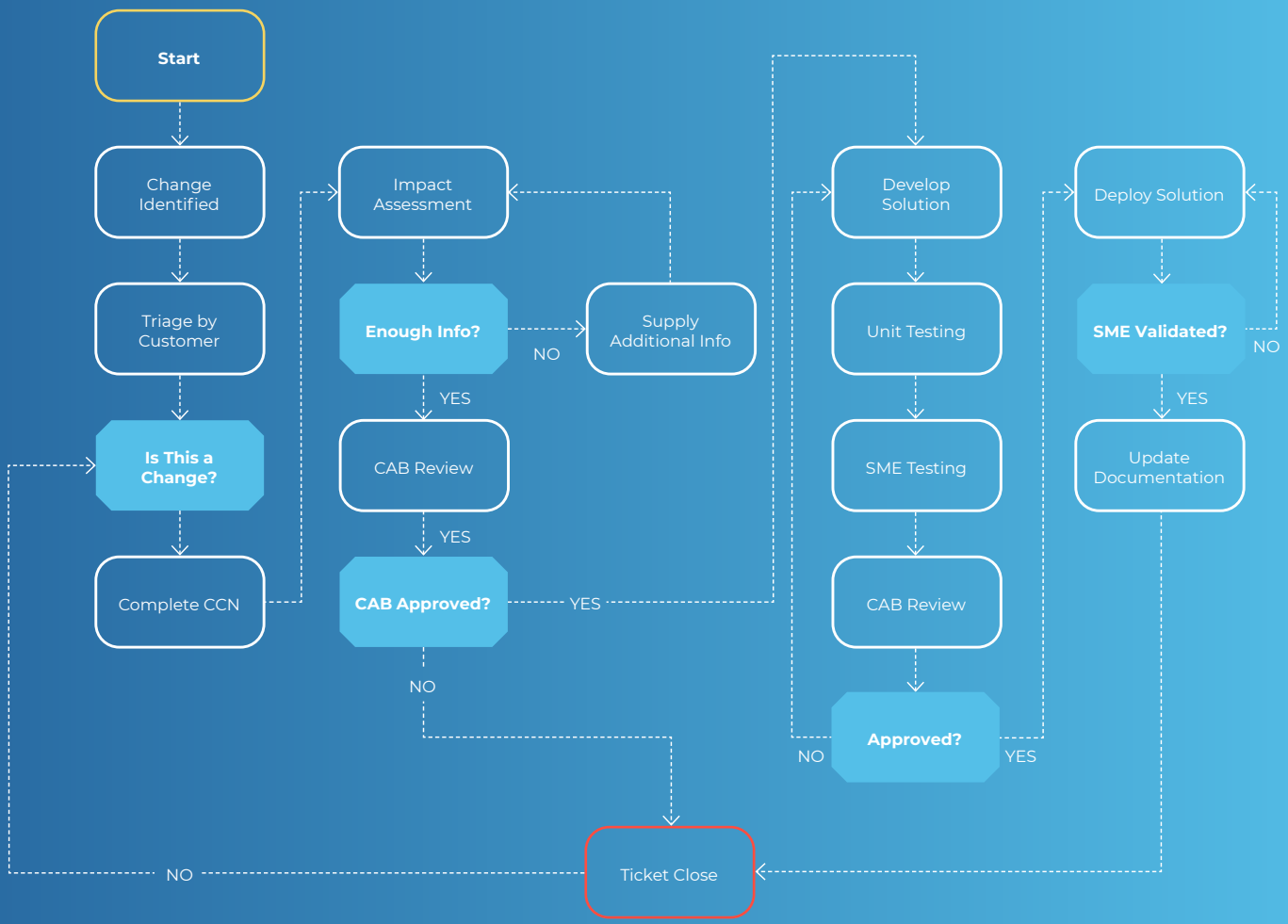
2.2.3 CONTINUOUS IMPROVEMENT

VRS is committed to driving continuous improvement within your Unit4 ERP environment, implementing enhancements and optimizations to maximize efficiency and performance over time.

We recognize the importance of continuously enhancing your application to align with evolving business needs, seize new opportunities, and leverage emerging functionalities. At Vision ERP, we're committed to supporting your objectives in maximizing the value of your solution.

Any modifications to your system will adhere to a governance framework established in collaboration with key stakeholders, ensuring alignment with your organization's strategic goals and operational requirements.

Changes will be managed carefully using the following process:



2.2.4 INTEGRATION MANAGEMENT

Our Integration Management service is dedicated to seamlessly integrating your Unit4 ERP system with your existing infrastructure and third-party applications. We take the time to learn, understand, and support your current integrations, ensuring that they continue to operate smoothly and effectively.

With Unit4's cloud platform, you gain access to the Unit4 Extension Kit, unlocking the potential to leverage APIs for smarter integration solutions.

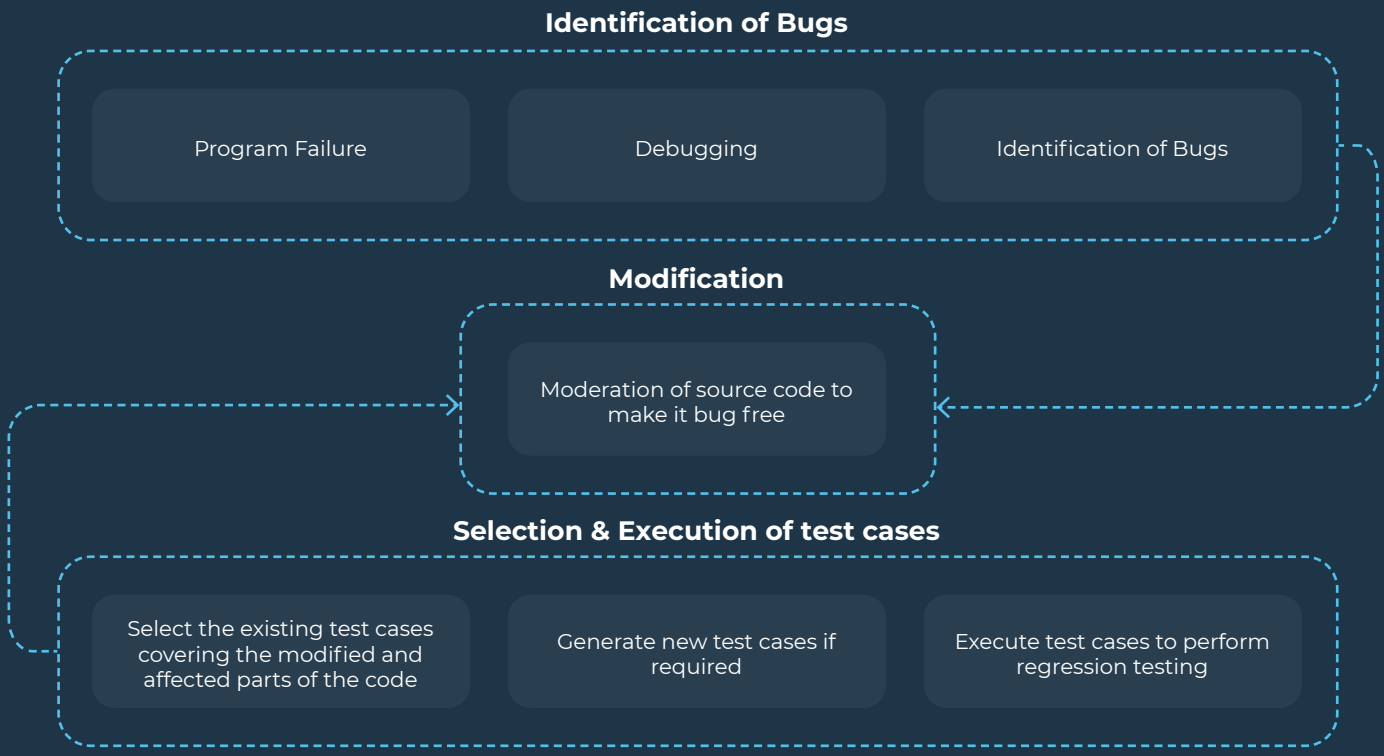
For example, we can integrate absence data directly into your MS 365 calendar, streamlining scheduling and resource management processes. Additionally, we can utilize the Wanda Digital Assistant to enable task approvals via MS Teams, enhancing collaboration and efficiency within your organization.

Our expertise extends to safely automating routine tasks, such as current period rollovers and automatic UK bank holiday updates, minimizing manual effort and ensuring compliance without the need for AG16s.

With Vision ERP's Integration Management, you can maximize the value of your Unit4 ERP system by seamlessly connecting it with your existing ecosystem and leveraging innovative integration solutions to streamline operations and enhance productivity.

2.2.5 PATCH/REGRESSION SUPPORT

Source



Vision ERP's Patch/Regression Support service ensures your Unit4 ERP system remains optimized and secure. We keep you updated on the latest Unit4 schedule, reviewing release notes and assessing their impact on your solution.

Our team arranges environment copies for regression testing on the latest build, ensuring a smooth transition to production. Whether supporting testing or providing resources, we ensure thorough testing coverage to validate system stability post-patch.

With our proactive approach, you can focus on your business while we handle system maintenance and optimization, safeguarding your ERP environment for continuous success.

2.2.6 ENVIRONMENT MANAGEMENT

Vision ERP excels in managing your Unit4 ERP environment with meticulous attention to detail, ensuring optimal performance and reliability. Our Environment Management service encompasses a comprehensive plan tailored to your organization's needs.

We meticulously plan and schedule environment clones, ensuring that they align with your operational requirements and facilitate seamless testing and development activities. Our team maintains an updated environment plan, incorporating current activities and future changes to ensure that all work is completed and tested correctly.

This integrated approach links with patch support and Database Management (DM) activities, ensuring a cohesive strategy for maintaining and optimizing your environment. Additionally, where applicable, we prioritize data anonymization to uphold confidentiality and compliance standards, further enhancing the integrity of your Unit4 ERP environment.

With Vision ERP's Environment Management, you can trust that your system infrastructure is in capable hands, allowing you to focus on driving business growth and innovation.

2.2.7 TRAINING

As part of VRS, we offer training programs tailored to your organization's needs, ensuring that your team is equipped with the necessary skills and knowledge to effectively utilize and manage the Unit4 ERP solution.

With VRS, Vision ERP aims to provide a holistic and proactive approach to managing and supporting your Unit4 ERP application, allowing you to focus on your core business activities with confidence.

Learn more about VRS:

https://visionerp.co.uk/vision-response-service



2.3 Service Level Agreement

PRIORITY	RESPONSE SLA	RESOLUTION SLA	COMMENTS
Urgent	15 minutes	4 hours	Working hours/days
High	30 minutes	8 hours	Working hours/days
Medium	4 hours	2 days	Working hours/days
Low	1 working day	1 week	Working hours/days

2.4 Service Level Agreement

PRIORITY	DEFINITION
Urgent	Affecting all users/Severely impacting pay/no workaround in place
High	Affecting a large number of users/no workaround in place
Medium	Affecting a small group of users/workaround in place
Low	Affects one or a few users/workaround in place

Support is commonly provided remotely during normal working hours from 8.30 am – 5.30 pm Monday to Friday.

An enhanced out-of-normal hours or tailored service is available on request.

3.0 Strategic Development Partner Service

At Vision ERP, we understand that achieving organisational goals requires more than just effective application management. Our Strategic Development Partner Service is designed to elevate your organisation's capabilities by aligning technology, processes, and people with your strategic objectives.

3.1 Our Approach

Acting as trusted solution architects, we work alongside your team to identify and deliver transformative opportunities. This service is built on collaboration, innovation, and a deep understanding of your unique challenges and goals.

We provide the following key components:

3.2 Solution Architecture & Innovation

Our experts analyse your current system and processes, identifying opportunities to:

- Introduce new functionalities to address gaps or inefficiencies.
- Modernise existing workflows for improved productivity and alignment.
- Leverage emerging technologies to unlock new potential.

3.3 Strategic Business Case Support

Building a compelling business case is critical to driving adoption and securing investment. We assist in:

- Defining clear objectives and measurable outcomes.
- Providing detailed cost-benefit analyses.
- Supporting stakeholder engagement and alignment.

3.4 Process Optimisation & Change Management

Effective transformation requires seamless integration of new processes and systems. We:

- Assess and refine operational workflows to support strategic objectives.
- Provide training and mentoring to ensure successful adoption.
- Monitor performance metrics to ensure sustained benefits.

3.5 Project Management Excellence

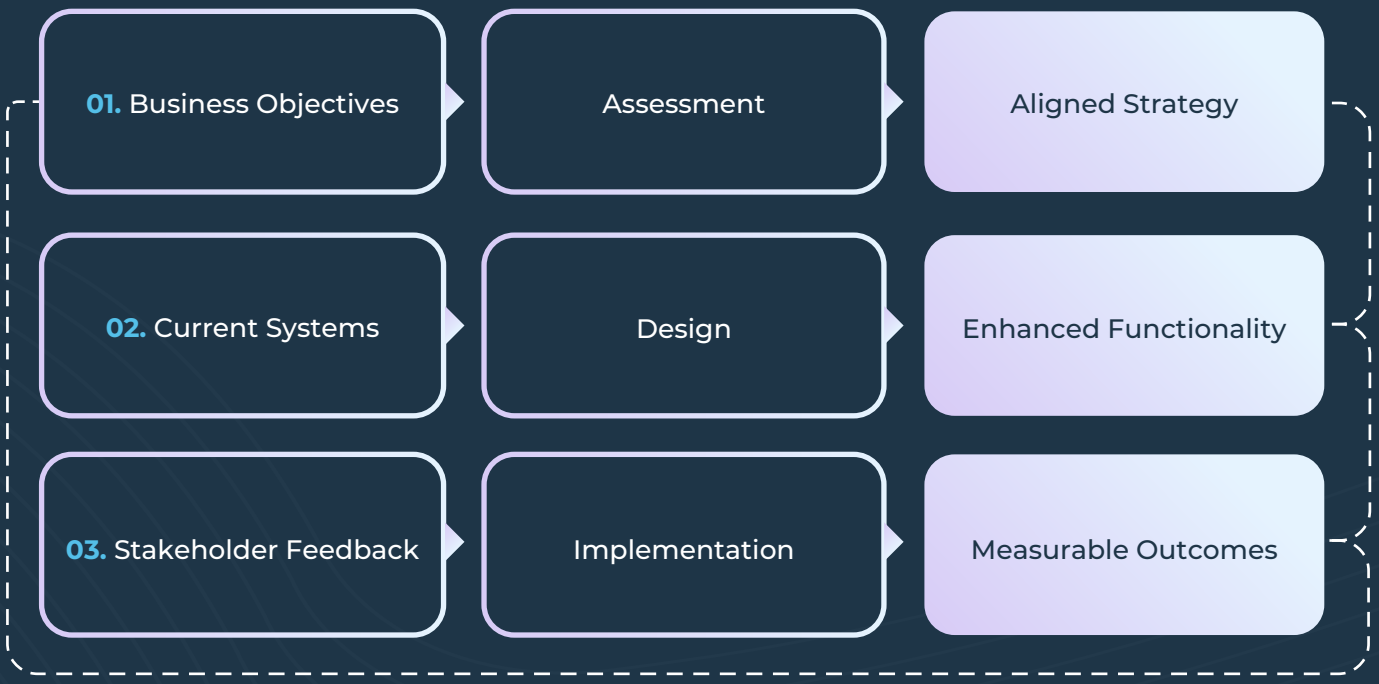
With our expertise in programme and project management, we guide initiatives from concept to completion:

- Establishing robust governance frameworks.
- Delivering on-time and within budget.
- Ensuring compliance with ISO 9001 standards for quality management.
- Monitor performance metrics to ensure sustained benefits.

3.6 Benefits of the Strategic Development Partner Service

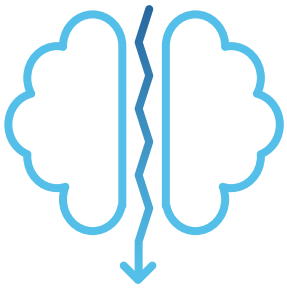
By partnering with Vision ERP, you gain:

- **Alignment:** Ensure technology and processes support long-term organisational objectives.
- **Innovation:** Leverage cutting-edge solutions tailored to your needs.
- **Efficiency:** Streamlined workflows and optimised performance.
- **Confidence:** Proven methodologies and best practices delivered by experienced professionals.



4.0 Unit4 ERP Consultancy & Training

At Vision ERP, we understand the critical role that effective consultancy and training play in maximizing the benefits of Unit4 ERP within the public sector. Our comprehensive approach to Unit4 ERP consultancy and training is designed to empower your team with the knowledge and skills needed to harness the full potential of the system.



4.1 Mentoring & Knowledge Transfer

At Vision ERP, we understand the critical role that effective consultancy and training play in maximizing the benefits of Unit4 ERP within the public sector. Our comprehensive approach to Unit4 ERP consultancy and training is designed to empower your team with the knowledge and skills needed to harness the full potential of the system.



4.2 Online Sessions

We offer a variety of online sessions to cater to different requirements:

- New Functionality: Stay updated with the latest features and enhancements through online sessions dedicated to showcasing new functionalities.
- Specific Groups of Users: Tailored sessions designed for specific user groups, ensuring that each team member receives training relevant to their role.

Deep Dives: Dive deeper into particular areas of Unit4 ERP through focused sessions that explore specific functionalities or processes in detail.



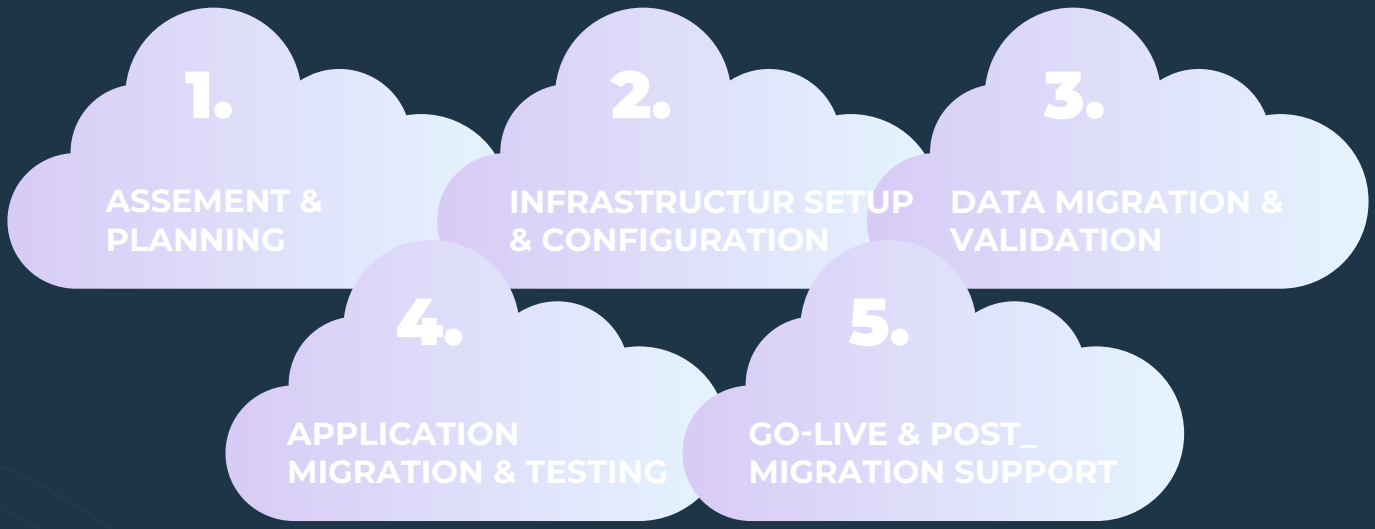
4.3 Formal Training

For organizations requiring formal training, we offer structured training programs that can be customized based on your needs. These programs include comprehensive documentation to support learning and reference needs. Formal training sessions are delivered upon request, ensuring that they align perfectly with your organization's schedule and objectives.

5.0 Unit4 ERP Cloud Migration

Vision ERP offers comprehensive Unit4 Cloud Migration services to seamlessly transition your ERP system to the cloud, unlocking a host of benefits including increased scalability, flexibility, and accessibility. Our proven methodology ensures a smooth migration process, minimizing disruption to your operations while maximizing the potential of your Unit4 solution in the cloud environment.

Our Unit4 Cloud Migration process typically includes the following steps:



5.1 Assessment and Planning

The first step in our Unit4 Cloud Migration process involves a thorough assessment of your current ERP environment and business requirements. Our team collaborates closely with your stakeholders to identify goals, assess readiness, and develop a tailored migration strategy. We conduct a comprehensive analysis of your existing infrastructure, data, applications, and workflows to determine the optimal approach for migration.

5.2 Infrastructure Setup and Configuration

Once the migration strategy is finalized, we proceed with setting up and configuring the cloud infrastructure to support your Unit4 ERP system. This involves provisioning cloud resources, configuring security settings, and establishing connectivity to ensure seamless integration with your existing IT environment. Our experts leverage best practices and industry standards to optimize the cloud infrastructure for performance, reliability, and security.

5.3 Data Migration and Validation

Data migration is a critical aspect of the Unit4 Cloud Migration process. Our team utilizes industry-leading tools and methodologies to extract, transform, and load (ETL) your data from on-premises systems to the cloud environment. We meticulously validate the integrity and accuracy of migrated data to ensure a smooth transition and minimal disruption to your business operations.

5.4 Application Migration and Testing

Next, we migrate your Unit4 ERP application to the cloud, ensuring compatibility and functionality in the new environment. Our team conducts comprehensive testing to validate application performance, functionality, and integration with other systems. We perform various testing scenarios, including load testing, stress testing, and user acceptance testing, to identify and resolve any issues before cutover.

5.5 Go-Live and Post-Migration Support

Once testing is complete and all stakeholders are satisfied, we proceed with the go-live phase of the migration process. Our team coordinates closely with your IT staff to execute the migration cutover plan, ensuring a seamless transition with minimal downtime. We provide comprehensive post-migration support to address any issues or concerns that may arise, ensuring a successful migration and ongoing optimization of your Unit4 ERP system in the cloud.

Learn more about our Unit4 Cloud Migration service:

https://visionerp.co.uk/unit4-cloud-migration

6.0 Empowering Your Organisation

With Vision ERP as your Strategic Development Partner, your organisation is well-positioned to:

- Assess and refine operational workflows to support strategic objectives.
- Provide training and mentoring to ensure successful adoption.
- Monitor performance metrics to ensure sustained benefits.

6.1 Proven Methodology and Consistent Approach



Next, we migrate your Unit4 ERP application to the cloud, ensuring compatibility and functionality in the new environment. Our team conducts comprehensive testing to validate application performance, functionality, and integration with other systems. We perform various testing scenarios, including load testing, stress testing, and user acceptance testing, to identify and resolve any issues before cutover.

6.2 Transparent Approach and Robust Governance



We prioritize transparency and accountability in our programme management approach. Our robust programme governance ensures clear communication, stakeholder engagement, and adherence to project timelines and budgets.

6.3 ISO 9001 Compliant Quality Management



Quality is at the forefront of our programme management strategy. We adhere to ISO 9001-compliant quality management processes to ensure that requirements are met, and deliverables meet the highest standards of excellence.

6.4 On-Time, On-Budget Delivery



Our dedicated team works closely with you to ensure that your digital transformation programme is delivered on time, within budget, and exceeds expectations. We are committed to achieving your strategic aims and driving tangible results for your organization.

Contact Us:

Grosvenor House
11 St Pauls Square
Birmingham
West Midlands
B3 1RB

0121 227 5052

enquiries@visionerp.co.uk

Vision ERP