



VerseOne Research & Innovation Portal

Service Description

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1. Introduction to VerseOne

VerseOne delivers transformative experiences that change the way the public sector interacts with their customers and engages with their employees.

Founded in 2004, we have over two decades of innovation heritage, working in the social housing, NHS and local government sectors.

The team at VerseOne is passionate about solving problems that help our customers to meet the needs of their service users, and we take great pride in the work we do to help in mission-critical environments with vulnerable people.

We have an in-house product development team that leverages our key pillars of Integration, Automation and Personalisation to create digital solutions that people love to use. By integrating to back-office systems and a familiar Microsoft environment, along with automating processes and enabling self-service, we enable 24/7 working practices, drive efficiencies, and improve outcomes.

2. R&I Overview

Many NHS Trusts undertake a great deal of R&I, often working closely with other academic organisations such as local universities, as well as relevant Patient Engagement Networks (PEN).

However, the current methods used to organise and facilitate these partnerships is time-consuming and inefficient, consuming valuable time that could otherwise be spent on research.

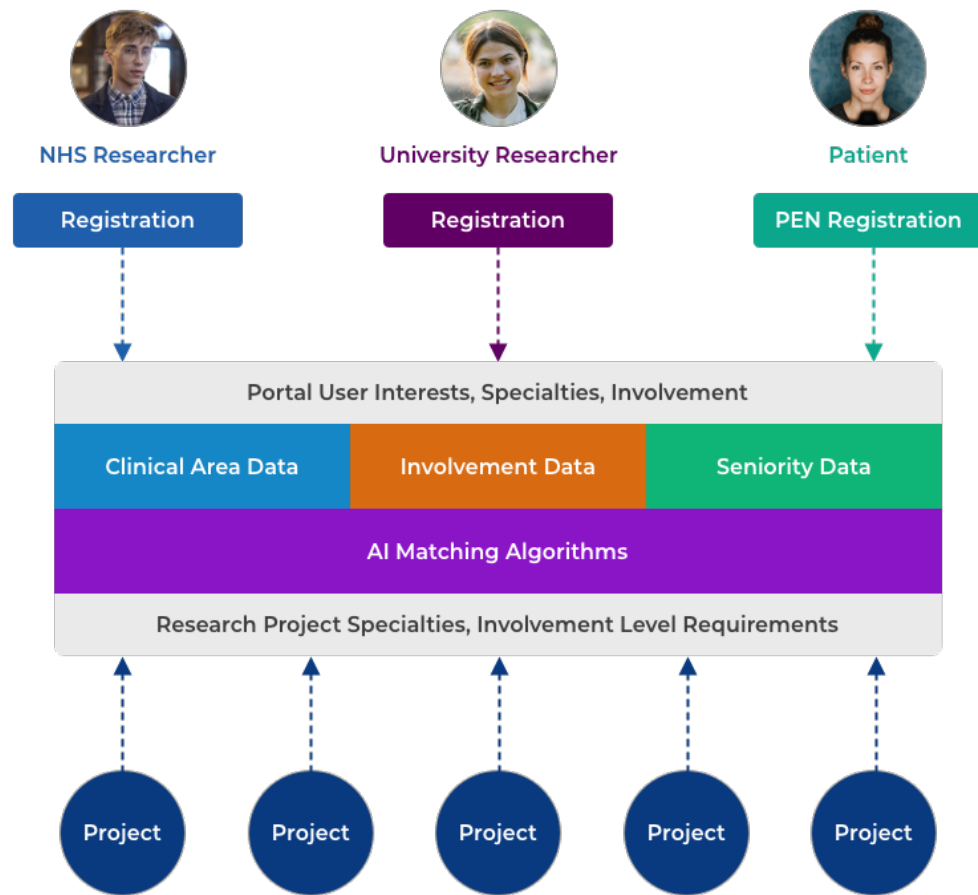
VerseOne was founded to make a difference to those working in the NHS, and dedication to security is one of the company core values — evidenced by its ISO 9001, ISO 27001, CyberEssentials, Data Security and Protection Toolkit (DSPT), and Information Commissioner's Office (ICO) Data Processor accreditations and registrations.

2.1. Scope

At the simplest level, the R&I Portal enables core actors to create accounts, login, publish studies and study ideas, and to receive feedback.

However, the innovation comes in using algorithms to match the various actors with studies and roles that are of mutual interest. This hugely reduces the time required to match academic and healthcare collaborators; with the subsequent addition of PENs, finding study subjects and engaging with the public is much more intuitive.

The R&I Portal thus becomes a vital network for increasing the effectiveness of R&I across the local area, reducing costs and placing Trust and university R&I departments at the forefront of NHS R&I.



2.2. Aims

The core aims and objectives are:

- to provide a secure platform for R&I scientists, clinicians, administrators and engaged members of the public to participate in R&I projects;
- to provide intuitive matching and collaboration across the platform that streamlines the R&I process;
- to provide a future-proofed solution that itself can continue to grow and innovate alongside the R&I teams' ambitions;
- to provide a platform that empowers researchers and scientists to focus on their core aim of driving medical and social care research, rather than on tedious and ineffective administration;
- to enrich the research and innovation ecosystem across local areas;
- to enhance the NHS and Clinical Research brands through enabling faster and more effective research outcomes.

3. R&I Portal Functionality

The research projects are at the heart of the portal functionality, and their staging and progression follows the default core stages outlined within the existing processes.

The portal is not merely a website: it is a functional tool for streamlining and enhancing researchers' ability to engage and collaborate across these projects — whilst maintaining the outlined structures and ways of working.

In order to outline the functionality available, we start with the various actors (“personas”) involved.

3.1. Personas

There are two primary personas:

- NHS Trust research & innovation staff;
- academic research & innovation staff.

Partnering with an NHS Trust is essential for academic staff, especially as regards funding, but identifying suitable collaborators is often one of the more time-consuming parts of the project.

There are two secondary personas:

- members of Patient Engagement Networks;
- members of the public who may be interested by not part of a network.

The key differences are:

- NHS Trust and academic R&I staff submit projects, comment on all projects, etc.
- PEN and members of the public view Projects that they are explicitly invited to view.

So, a method of inviting people — both portal members or otherwise — to join a project is included within the project scope.

3.1.1. Registration of Account

There are at least three Registration Pathways, based on the relevant Personas. This enables the system to determine and record the

Personas, and thus to provide some validation, as well as differing options or content when desired.

3.1.2. Terms & Non-Disclosure Agreement

It is important that users accept the portal Terms and Conditions, which must also include a Non-Disclosure Agreement (NDA). The team has discussed this being accepted at an organisational level, but a summary or link to the organisationally agreed NDA should still be provided — otherwise legal acceptance would be difficult to prove on an individual level.

3.1.3. Registration of Areas of Interest

This element is crucial since it provides the data used to drive the matching algorithms. It is envisioned that after successful Account Registration, users are asked to enter a number of data elements relating to their interests and status.

These are collated into three areas:

- **research / clinical specialty:** initially populated from NHS Trust Services list, at two levels depth, i.e. a list of parents, with each parent having just one child list. If we get any more specific than this, the chances of making matches decrease exponentially;
- **level of desired research project involvement:** this is informed by previous experience or current level of interest, e.g. supervisor, collaborator, etc.;
- **qualifications / seniority / experience:** this might encompass doctorate level, consultant / registrar, etc.

These should be selected as simple checkboxes, and stored against the user's Contact Record.

These fields need to be displayed to the user, and editable by them, in their Personal Settings Placement, as they may wish to amend settings over time.

3.1.1. Login

Users should login with username and password, in the first instance.

However, as an option, VerseOne's platform allows for SSO (which can be easily applied for NHS Trust staff) and for biometric logins (fingerprint, face) if supported by the user's device.

3.2. Research Project

Research Projects is a Module within the Portal: it has distinct similarities to an existing Project Module, but has additional fields and functionalities.

3.2.1. Research Project DB Schema

The anticipated fields are outlined below: the most crucial area at this point in time is that it shares the same Areas of Interest Fields as those completed by the active Personas.

Area	Field	Type	Notes
Basic Details	Project Name	TXT	
	Description	TEXTAREA	
	Type	SELECT	
	Comments	On / off	
Project Overview	Project Leads	LOOKUP	A Contact(s) Multi-lookup field
	Display Project Leads details	SELECT	Yes / No
	Project Overview	WYSIWYG	A short summary of the project
Project Details	Project Details	WYSIWYG	A more detailed overview of the project
Project Attributes	Project Stage	SELECT	A dropdown showing the default stages as outlined in the existing process. Needs to output a class on the front-end for styling hooks.

Area	Field	Type	Notes
	Clinical Area	CHECKBOXES	This displays the clinical / specialty fields as completed previously by users at the Registration Stage
Project Collaborators	Collaborator Involvement	CHECKBOXES	This displays the level of desired research involvement fields as completed previously by users at the Registration stage
	Collaborator Seniority	CHECKBOXES	This displays the level of qualifications / seniority fields as completed previously by users at the Registration stage
Comments	Comments on	SELECT	Yes / No
	Comments public	SELECT	Yes / No (if no, the comments are only displayed to the Project Lead(s)).

3.2.2. Research Projects Relationships

Research Projects have a number of many-to-many Relationships which are driven from the front-end:

Area	Field	Type	Notes
Resources	Documents	$\infty - \infty$	Resources tab already exists: there are an unknown (∞) number of uploads in the front-end to support the Projects.
	Images	$\infty - \infty$	
Collaborators	Collaborators	$\infty - \infty$	Already exist. Needs front-end control and display.
	Collaborator Role	$\infty - \infty$	Already exists. Needs front-end control and display, e.g. Project Lead, Project Collaborator.
Comments	Comments	$\infty - \infty$	As per Blogs — but Comments should also allow uploads. Could use the Message Stream functionality instead.

Area	Field	Type	Notes
Likes	Likes	$\infty - \infty$	Likes could include Comments; need to record the Contact ID.

3.2.3. Research Projects Front-end Display

The projects are displayed as a Content List and Single Item as per the standard framework.

In addition to the fields above, the display includes:

- number of comments;
- number of views (Hits).

As well as the standard alphabetical options, the Content List options include the option to Order by Hits.

Front-end Filters

Users should be able to order Projects by:

- number of Likes (default);
- number of Views ("Hits");
- number of Comments;
- Research Stage;
- A–Z of Project name.

3.2.4. Research Projects Search Placement

It is important that users can search for projects, with the key filters being:

- **keywords** — search name and description;
- **Project Stage** — checkboxes displaying stages 1 to 8, which will be **OR**, e.g. selecting 6, 7 and 8 will return projects that are in any one of those stages;
- **Clinical Area** — initial display of the parents: selected parents will then display their children for increased refinement (simple JavaScript display switches, not dynamic load). This will search as **OR**, as above;
- **Collaborator Involvement** — checkboxes as above.

Items within a filter will be **OR**, but filters combined will be **AND**, e.g.

- keyword: "autism" **AND** stage: 3 **OR** 4 **OR** 5 **AND** clinical area: psychology **AND** involvement: Supervisor.

Results should be ordered by relevance then by date, as appropriate..

3.2.5. Front-end Editing

Projects are available via Front-end Editing, as this is the default method of creating and editing Research Projects.

3.3. Matching Personas and Projects

The crux of the portal is the matching of users with projects, and gaining feedback and collaboration. As such, the project includes a report that matches portal users to research projects based on matching data, and a method for users to message each other through the portal.

This is done through an AI-assisted algorithm delivered through Prodigy AI Content Matching Module.

3.3.1. Project => User Matching Placement

Once a Project has been Published, it will be visible to the Project Leads in the the Project Matching Placement.

- They select their project, and press Find Collaborators;
- this returns a list of portal users who meet the matching threshold;
- the user can select one or more of the recommended users, and group them as potential Collaborators;
- the user can send all Potential Collaborators a message, inviting them to participate;
- or they can message the Potential Collaborators individually;
- if the Collaborators accept the invitation, they are moved to a status of Accepted Collaborators;
- the Project Lead can manually appoint Accepted Collaborators as Full Collaborators or Project Leads.

We need to establish what needs to happen beyond this: can they use a subsequent private messaging service, or should they then take their communications out to email, etc.

3.3.2. User => Project Matching Placement

A user can view and amend their key data attributes at any time.

- Within this Placement, the user will be able to press a “Find Projects” button;
- this will return any research projects that match their user criteria;
- the user can then message the Project Leads, expressing interests and requesting a Collaboration invitation.

We need to establish what needs to happen beyond this: can they use a subsequent private messaging service, or should they then take their communications out to email, etc.

4. Summary

VerseOne believes that this portal provides significant benefits to NHS Trust and the university, and that the organisations can not only derive real value for money from this development, but also highlight the innovation that is the portal network itself.

Using algorithms (and AI) to match actors with studies and roles that are of mutual interest which hugely reduces the time required to match academic and healthcare collaborators. The subsequent addition of PENs make finding study subjects and engaging with the public much more effective.

5. VerseOne Digital Experience Platform

VerseOne believes that transformative experiences hinge on our ability to deliver the right information to the right people at the right time, via the channel or device of their preference. To allow us to do this, our product portfolio is built on the key pillars of Integration, Automation and Personalisation.

5.1. Integration

The creation of rich experiences, with accurate data, requires integration with back office systems. These include line of business type applications (like Housing Management Systems in Social Housing or Clinical Service Databases in the NHS), operational applications (like HR Systems, Workforce Schedulers, Candidate Management Tools, etc), or mainstream IT environments (like Microsoft Active Directory, SharePoint, OneDrive, M365, Teams, etc).

Regardless of the system in question, Autevo from VerseOne uses API connection to push and pull information to/from these systems, including the ability to "write back" if the user updates any records, for example. This kind of integration allows customers to serve themselves, employees to access the information they need to do their jobs, and delivers great experiences 24/7/365.

5.2. Automation

VerseOne builds on the foundation of integration by using our in-house Business Process Automator (BPA) to speed up your operations via automation. We have many prebuilt processes in our digital solutions, designed-for-purpose for social housing and healthcare use, as well as giving you the toolkit needed to automate your own unique processes.

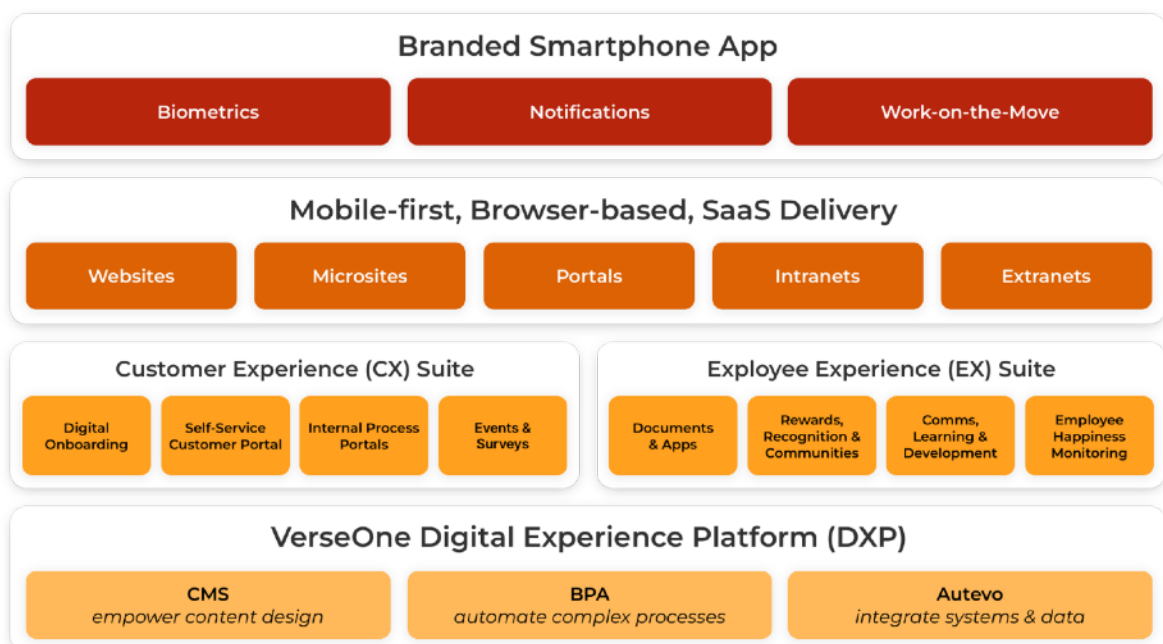
Automation is a significant value driver as it saves time and cost whilst ensuring greater accuracy and quality. Using BPA alongside Autevo allows us to transform the way you work whilst making life easier for the customers you serve.

5.3. Personalisation

VerseOne infuses all our solutions with personalisation so that your users (be they customers or colleagues) can tailor the experience you deliver to their personal preferences and working practices. This starts the minute they logon (using biometrics, perhaps) via secure authentications methods and see the page in front of them transform to their own unique version of the solution.

Our Content Management System (CMS) allows users to subscribe to information sources that they like whilst our AI-powered preference management tools deliver curated content based upon the user's historical behaviour.

Soft-key configurable placements allow content creators to change how your solution works, natively in the CMS, without needing to write code. This allows you to customise and personalise your digital world, without the delay or cost usually associated with such advanced functionality.



The combined power of Integration via Autevo, Automation via BPA and Personalisation via CMS come together to form VerseOne Digital Experience Platform (DXP). We leverage this capability to change you interact with customers and engage with employees.

5.4. Customer Experience (CX) Suite

Our CX Suite puts the power of our DXP in the hands of your customers. We have out-of-the-box capabilities to bring your customers online, enable self-service, automate internal customer-facing processes, run events, carry out surveys, and much more besides.

5.5. Employee Experience (EX) Suite

Our EX Suite does the same but this time, it's your workforce that we're empowering. We give them access to the people, policies, knowledge and tools they need to do their jobs, including the ability to collaborate in real-time with their colleagues. We also help with Rewards & Recognition, Learning & Development, real-time happiness monitoring, and more.

5.6. The Digital Solution

Our CX and EX Suites are delivered in a mobile-first, accessibility compliant manner, via either a browser or an app. Historically, we've called these websites or intranets or portals, but that doesn't do justice to the transformative power of these digital solutions.

In a mobile-first world, push notifications and instant logon via biometrics means we can work and interact from anywhere, and access the VerseOne CX and EX Suites to achieve great things in the modern working world.

6. Role of AI in Automation and Content Management

Data-driven insights and AI hold huge potential in streamlining business operations — from surfacing trends to summarising documents. With “generative” AI so prominent in the headlines, it is inevitable that public sector organisations will want to incorporate these advances into their daily operations.

“Big Data”-oriented Artificial Intelligence is perfect for analysing trends in data, that can empower organisations to make data-driven decisions that enable them to operate more efficiently. Many public sector bodies have already engaged in predictive AI, e.g. in spotting patterns in arrears in order to support rent payment revenues, but this technique also has pertinent applications in many other critical areas.

On the other side, the advances in Large Language Models (LLMs), such as Chat GPT (and its art and video equivalents), have been widely reported: these can, and will, help substantially in the often time-consuming world of content creation — although they still require human supervision.

VerseOne incorporates AI into its DXP through the Prodigy AI platform, with a collection of value-add AI-drive services and functionalities that can be switched on as needed. Some examples of Prodigy AI Modules include:

- using Computer Vision to automatically generate meaningful alt tags and captions for images;
- using LLMs to write concise summaries of large text articles or documents, with a defined Reading Age score;
- using LLMs to generate articles on a user-chosen topic, but written with a focus on Accessibility (i.e. aimed at those of age 15 – 16);
- analysis of free text in order to determine Sentiment — which is particularly useful for organisations using forums or message streams to consult residents or the public on services or proposals (and so demonstrating the regulator-mandated transparency in decision-making);
- using anonymised usage data to improve search results, undertake pattern detection, and trend analysis — both for surfacing the most relevant information within the VerseOne DXP, and to provide data resources on relayed trends, e.g. seasonal repair types reporting.

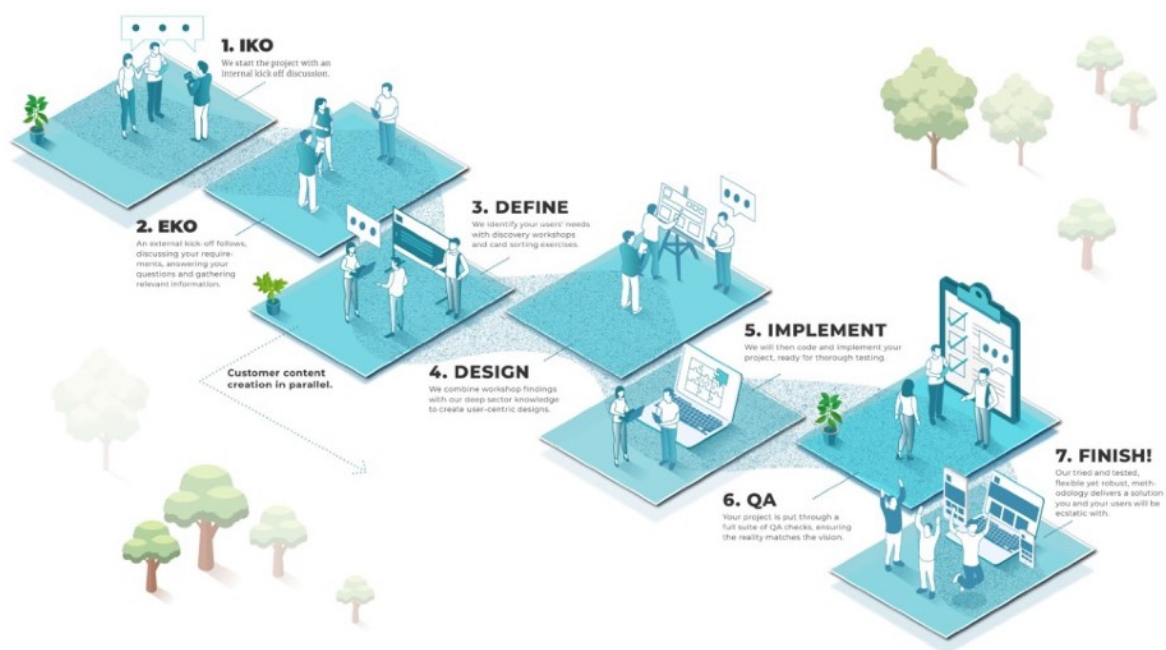
Prodigy AI is an area of active research and development, and is empowering organisations to leverage the nascent power of AI.

7. Project Implementation Process

For your digital solution to be successful, VerseOne combines both creative inspiration and practical execution skills to work with your teams on project delivery and implementation.

7.1. The Stages of the Project

The diagram below shows the key steps in the process we follow to bring a digital project to life, using ISO9001 and ISO27001 principles.



7.2. Internal Kick Off

For the IKO, we bring together the whole bid team (which includes four people who are board members and part of our senior management team). The objective of the IKO is to prepare for the rest of the process, brief any new members of the project team, and to start brainstorming ideas of how to deliver the project.

7.3. External Kick Off

The EKO is as it sounds. It's the beginning of the formal project management process (described in detail in the next section), where we outline the overall approach, answer questions, and gain key insights

from the virtual team at the customer's end. This includes "must do" and "must not do" items.

7.4. Define, Design and Implement (or Deploy)

These will be described in the Project Journey section below in more detail.

7.5. Quality Assurance

At QA, we go through both internal tests as well as user acceptance testing and/or any equivalent steps with your team to ensure that the solution meets your needs at a functional level as well as for usability, accessibility and more.

7.6. Finish

Once you have signed off on the project and the content has been uploaded, the project is finished, and the solution goes live for your users.

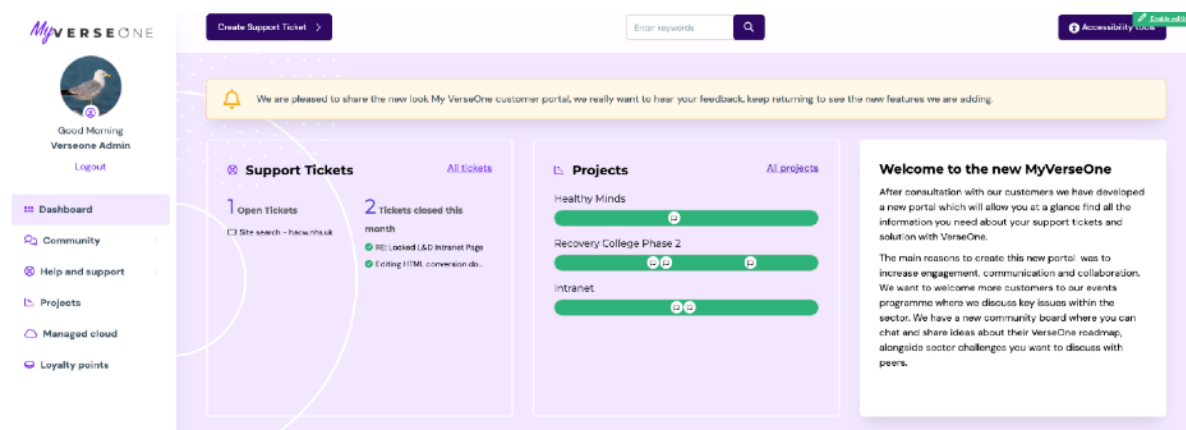
8. MyVerseOne Portal

At VerseOne, we use open standards and open-source software to build our own product suite. This includes our bespoke customer portal — MyVerseOne.

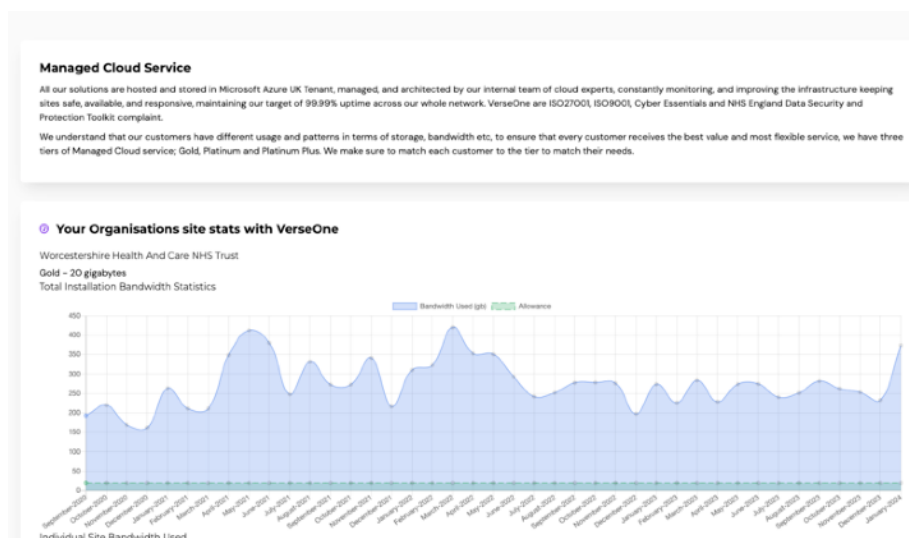
As a snapshot, it provides the following key features to users:

- Raise and manage tickets
- View project management timelines
- Reach community discussions and newsfeeds (for you to interact with your peers and fellow VerseOne customers)
- Access our knowledge hub and e-learning
- See current utilisation levels of bandwidth and storage

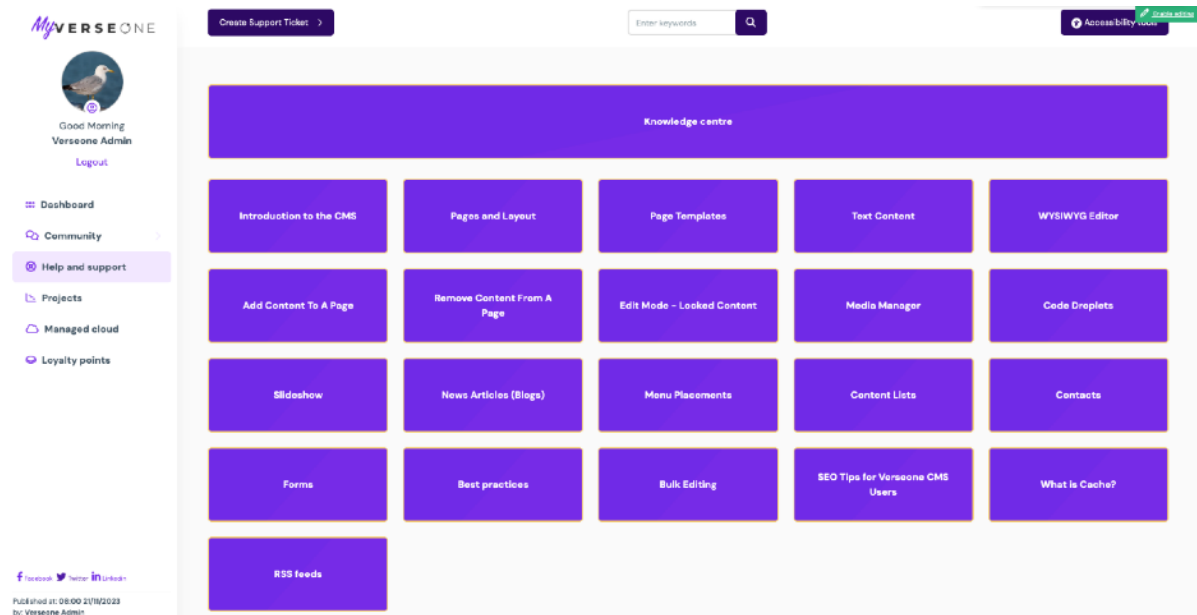
This is the portal homepage:



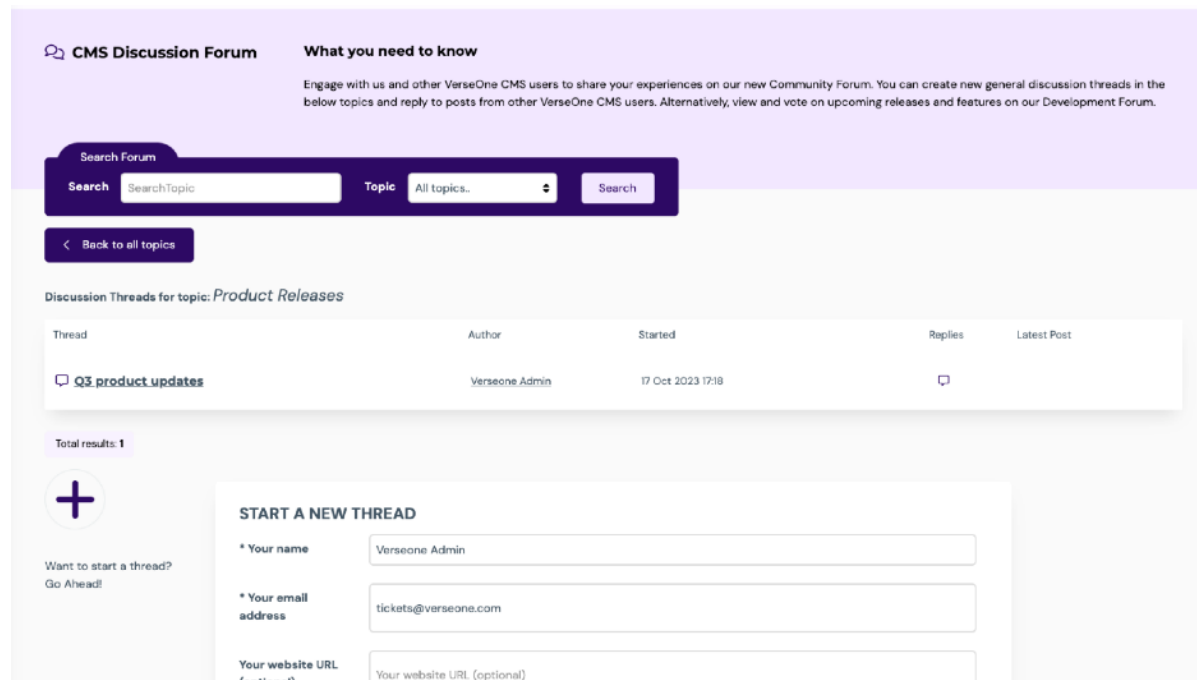
We provide utilisation graphs, such as the one below for Managed Cloud Services, so that you can see how your solutions are performing:



We have a comprehensive Knowledge Centre, where VerseOne users can go to find a wealth of information about how to make the most out of our CMS, as well as handy hints and tips:

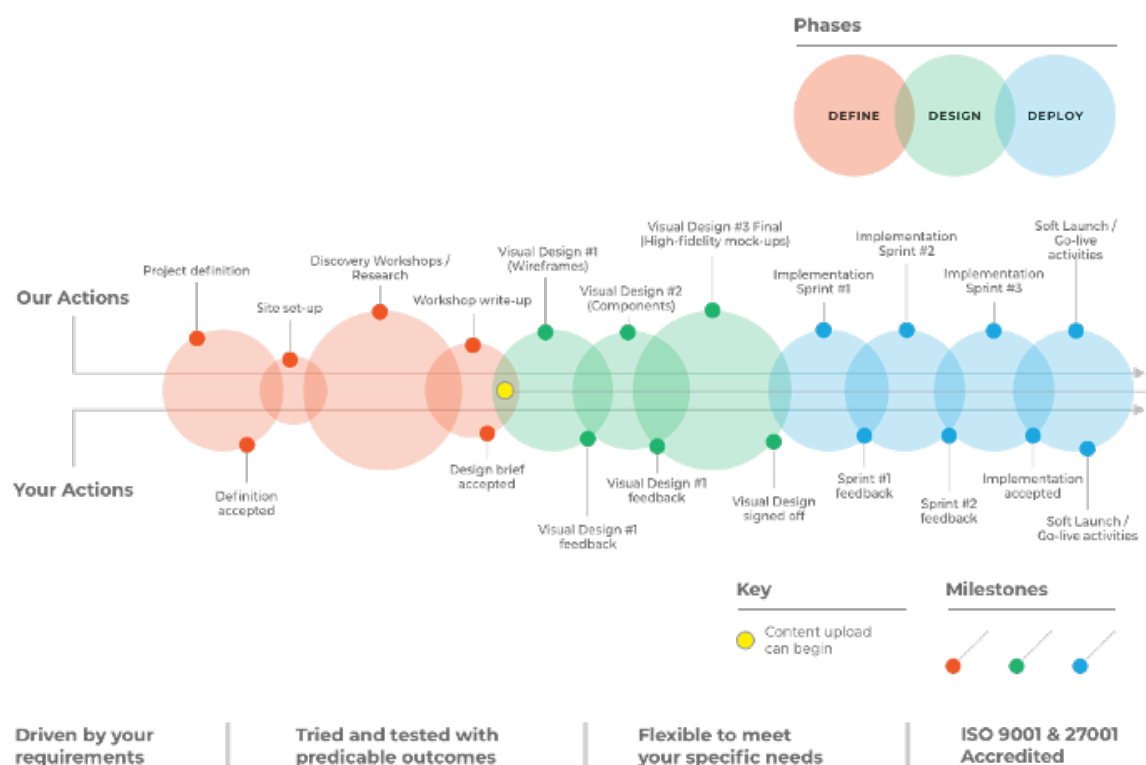


Users can also share help with their peers in the interactive forums:



9. Project Management Process in Detail

The diagram below shows the key stages in our delivery approach:



During the execution phase your project will be managed by a dedicated Project Manager from our Project Management Office (PMO). The following are the key elements of our approach:

- **Agreed Definition and Milestones:** the PMO works with your project team to define the project's scope, objective and deliverables. The teams establish key milestones or checkpoints to track progress.
- **Project Communications:** from the External Project Kick off to the Project Closure meeting, the PMO is in regular contact with your project team. These weekly updates include the project status, delivery against key milestones, and issues and risks. Communication between the two project teams is imperative to a project's success, highlighting concerns as soon as they arise, along with proposed solutions or mitigation strategies.

- **Project Documentation:** all relevant materials – the initial requirements, intranet designs, project plans and progress, weekly minutes, etc – are sent to the project team and available through MyVerseOne.
- **Stakeholder Engagement and Workshops:** we place significant importance on stakeholder engagement early in the process so that we engage with the customer's project team and the wider stakeholder group early and often. These consultations involve stakeholder workshops based on an Information Architecture Methodology. The workshops help to identify user goals, user journeys, aesthetic preferences, and more.
- **Types of Stakeholders involved:** VerseOne involves various stakeholders, including service users, staff members, and senior management, in the consultation process. Each group provides valuable input and we would work with you to define who should be in these internal and external user groups.

9.1. Define Phase and Information Architecture (IA)

Information Architecture (IA) is an essential aspect of designing intranets and other web-based solutions. We focus on organising and structuring content in a way that ensures users can find the information they need quickly and efficiently.

In essence, it's about creating a logical and user-friendly structure for information. One of the foundational steps in the IA process is defining clear aims or objectives for the project. This step involves separating "the means," "the reason," and "the ends", which helps clarify the project's goals and deeper intentions.

Information Architecture acts as a guiding framework for structuring information and content in a way that not only serves the needs of users but also aligns with the broader goals of the project and the outcomes you wish to deliver. It's a critical component in web design, user experience (UX) design, and the overall success of digital information systems.

The IA workshopping process helps us to develop the following:

- **User-Centred Design:** the IA exercise helps VerseOne to gain insights into how the solution will contribute to your project objectives, meet the needs of your stakeholders, and promote the organisation's brand and identity.

- **Navigation and Signposting:** a good sitemap, nav design, breadcrumbing, etc, help in categorising content and assigning hierarchical relationships. This ensures that important information is prominently featured and easily accessible, improving user engagement.

9.2. Design Phase

Following the stakeholder workshops, VerseOne moves into the design phase. This consists of the following elements:

- **Site Specification Document:** a comprehensive document is created to detail all the outcomes of the Define (Digital Discovery) Phase. This document serves as foundational information for the entire project, ensuring that everyone involved has a clear understanding of the project's objectives and requirements.
- **Style Tiles and Design Prototype:** our creative team creates style tiles and design prototypes based on the inputs received during the discovery workshops. These style tiles will be fresh, creative, and accessible, ensuring the intranet's visual appeal and usability.
- **Prototype-Based Design Process:** VerseOne follows a prototype-based design approach, recognising the dynamic nature of the web. This approach involves using mood boards, style tiles, concepts, and live prototyping to capture the intranet's look and feel and its various elements. It allows for direct collaboration between our designers and your team, particularly when working on page layouts and content positioning within a browser.
- **Flexibility and User-Centric Design:** the goal of VerseOne's approach is to create a flexible and engaging design that aligns with your identity. However, the primary focus is on meeting the user's needs. This means ensuring that visitors can easily find information, understand it, and interact with it in a way that supports your organisational objectives.

In summary, VerseOne's approach to web design emphasises collaboration with clients and stakeholders, user-centric design principles, and the use of prototypes to create a visually appealing and functional website that aligns with the Trust's goals and identity.

9.3. Deploy (Implementation) Phase

Our implementation process follows a sprint-based approach. Sites are built in sprints allowing customers to check progress regularly. It also allows our Front-End Development (FED) team to build iteratively and refine the build, ensuring that it meets the project objectives and the site design. The FED team uses the latest web standards, including HTML5, CSS3 and JavaScript, to ensure that the site looks and functions as intended.

Unlike templated CMS solutions (e.g. WordPress), the VerseOne CMS is designed to be highly flexible. Content areas are generated when Placements (or widgets) are added to a page. This means your team can customise the content layout of any page on the intranet by simply adding or removing these Placements.

Our CMS is built to support Responsive Web Design (RWD), which means that intranets created using the CMS will automatically adapt and respond to different screen sizes and orientations. By starting with a mobile-first mindset, our teams ensure that the most critical content and features are prioritised for smaller screen, providing a better experience for users on mobile devices.

9.4. Accessibility

VerseOne is committed to championing accessible web solutions and adheres to the W3C WCAG 2.2 AA standards as a minimum. This demonstrates a strong commitment to ensuring that sites are usable by a wide range of users, including those with disabilities.

9.5. Post go-live and transition to Business as Usual

At the beginning of the project, you are assigned a Customer Success Manager (CSM) and Account Manager (AM). The CSM acts as your voice within VerseOne; they are involved from pre-sale and stay with your account, working on your behalf and becoming an extension of your organisation.

10. Total Engagement Programme

VerseOne has developed our own Total Engagement Programme (TEP) as our full lifecycle initiative for looking after customers. TEP covers all the elements of our customer experience, from support to account management and much more.

The diagram below shows the elements of our TEP:



The initial stages of engagement are Define – Design – Deploy, and these have already been discussed above.

Analyse and Advise are crucial stages where we help customers to understand the art of the possible with the solutions we provide you, as well as keeping you up-to-date with the latest digital industry developments. This includes regular events (even weekly webinars) where you can meet useful and interesting people, learn about best practices, and network with your peers.

The final stage of TEP is Benefits Realisation. Our Customer Success team takes ownership of this by defining (with you) what good looks like for each project, allocating KPIs and measurement tools (e.g. Google Analytics). At an appropriate

time – and ongoing – your Customer Success Manager will sit down with your team and go through the expected benefits and whether they have been realised, using the metrics and tools we have agreed.

10.1. Advisory Boards and User Groups

As part of our commitment to the social housing and NHS sectors, we run half-yearly advisory boards and user groups. The former are aimed at senior management, with topics that discuss the issues of the day, featuring speakers and leading thinkers from within the housing sector and outside experts too.

The latter are for the communications, marketing, IT and HR managers who are the day-to-day users of our solutions. Here, you have the opportunity to mingle with your peers, learn about getting more from our portfolio, hear about our roadmap and strategy, as well as having input on our future developments, including bespoke feature requests.

10.2. Support and Maintenance

We aim to resolve your call to VerseOne Support as swiftly as possible. Sometimes our ability to serve you may be partly dictated to by third-party service level agreements, e.g. with our managed hosting partners. In the event that we have escalated an issue to a partner like Microsoft, we will endeavour to keep you as informed as possible on a regular basis whilst letting you know the status of the ticket(s) raised with those partners.

Each of your requests is assigned a priority level determined by the nature of the request and the number of users affected by the problem (full details are in our SLA document, available on request). The progress of each call is closely monitored to ensure it is resolved within the agreed target time. All target times relate to hours of cover only (see above).

As a snapshot view (further detail below), we offer 24/7/365 support on the infrastructure (our Managed Cloud Service) that hosts our customers' solution. Standard support on the solution is Monday to Friday, 09:00-17:30.

10.3. Escalation Process

Escalation paths are fully described in our SLA document. The summary position is that any support issues are escalated from the Support Team Leader to the Chief Solutions Officer (VerseOne board member), and from the CSO to Alan Neilson (Founder and Executive Chairman).

Very rarely, if the issue is product-related, the escalation is from the CSO to the Chief Product and Compliance Officer (also a VerseOne board member). We believe these escalation paths should be very comforting for customers as any breach of SLA or P1 issue (see table below) is very quickly in the hands of at least one Executive Board Director.

In addition, hosting and solution performance is reported on at the monthly Board Meetings, with any security incidents also reported at that forum, along with any tickets that fall outside of SLA and any P1 incidents.

10.4. Upgrades and Software Maintenance

VerseOne provides free of charge upgrades as part of its standard Support and Maintenance contract. This is not only to give our customers the best value from their investment, but also because it is advantageous for us to ensure that our customers have all the latest security fixes and new features.

VerseOne continually develops its products in partnership with its customers, adopting a “fast release cycle” — comprising of minor releases, typically on a monthly cycle. Not every customer will receive these updates as soon as they are released (especially as many of our customers prefer to put a Communications Plan in place). Whether immediately or at a delayed time, customers will always be upgraded when they want to take advantage of a new feature (whether included-but-not-used or a paid-for optional module).

We use open-source software and open standards principles to build our technology stack, meaning that customers are not at risk of having (for example) a third-party plug-in accidentally becoming a security hole, or for an open-source CMS to be discontinued, requiring a lift-and-shift upgrade. Instead, we control functionality and security so that customers are never left stranded or exposed to security threats they couldn't possibly have anticipated in an open-source environment. All VerseOne

Customers benefit from being on the latest release and will not be in position where the software is end-of-life'd.

10.4.1.Maintenance Patches

Fixes to software defects (broadly defined as a feature that is not working substantially in accordance with the specification; deliberate changes to the way in which a feature works are not classified as defects) may be applied via a Maintenance Patch, especially where the defect is causing operating, compliance, or legal issues. This may be a minor change to code but will not usually include a database modification. Where a database modification is required, it will be limited to a few tables or table metadata.

Whether a defect requires a Maintenance Patch or not is decided by VerseOne in terms of its risk level and impact; most product defects will not fall into the Maintenance Patch category and will instead be resolved in succeeding Maintenance Releases. Defects that lead to defined compliance or legal issues will normally be resolved via a Maintenance Patch as soon as a fix has been identified and tested satisfactorily. Maintenance Patches are issued to customers as part of the Product License and Maintenance Agreement. When a fix to the defect has been identified and tested, VerseOne's Technical Services Team will install the Maintenance Patch, in accordance with current industry best practice.

10.4.2.Maintenance Releases

As part of your Product Licence and Maintenance Agreement, you are entitled to receive copies of all fault corrections and minor enhancements implemented by VerseOne as part of its regular maintenance release programme. Maintenance Releases — in contrast to maintenance patches — may include changes to the way in which features work (rather than fault corrections), and major functional enhancements such as new modules.

We will provide details of improvements and fixes addressed by the Maintenance Release and will liaise with you where needed to establish a schedule for applying the Maintenance Release. Our

Technical Services Team will then install the Maintenance Release, in accordance with current industry best practice.

10.4.3.Upgrade Process

Although VerseOne releases new features and functionalities on a fast cycle — roughly once per month — primarily to ensure that Quality Assurance can be tightly controlled.

Our customers will typically be upgraded three to four times per annum, with many electing to be upgraded on a schedule of their choosing — especially if there are significant new features — so that they can put a Communications Plan in place.

VerseOne's solutions are all hosted within our Microsoft Azure secure, load-balanced, high-availability Managed Cloud Services environment — currently serving 1.2 billion hits, and defeating about 1.6 million attacks, per month — which means that upgrades can normally be performed seamlessly and without any downtime for websites and intranets.

VerseOne has built extensive in-house automation tools that make upgrading simple and reliable — whilst the database upgrades are being done, VerseOne will temporarily disable the VerseOne CMS Admin Panel and Form submissions: however, this generally lasts less than 10 minutes, and usually less than 1 minute.

11. Managed Cloud Services and Cyber Security

VerseOne's performance and support standards are tightly – and deliberately – aligned with the expectations of our public sector customers, who often deal with life and death or hazardous situations. We are acutely aware that the services you provide are essential to your customers and that any impact on your ability to deliver services can have dire consequences.

Therefore, we know that your solutions need to be fast and operational 24/77/365, and we have created a secure, high-availability environment for running our customers' solutions with maximum reliability. We have several monitoring tools in place across our Azure Managed Cloud Services estate, which are owned and managed by our Managed Cloud Services (MCS) team. The MCS team proactively monitors the health of the various elements within the environment — including the load-balanced and clustered VMs, live databases, and Web Application Firewalls – to keep your solution performing well and safely.

VerseOne also uses Uptime Robot, a ping application that continuously checks that frontends are available, and monitors solutions for responsiveness. All these monitors have alerting thresholds that proactively alert all team members to any anomalies – on both work and personal devices – so that remedial action can be taken if required, whether in hours or out of normal office hours.

We are very proud of the performance levels achieved by our MCS team, as shown in the table below:

KPI (full year 2023)	Metric
Total Hits	4.53 billion
Total Bandwidth	210.6 Terabytes
Total Storage	9.18 Terabytes
Malicious Attacks Blocked	24.1 million
Average uptime	99.99%

Security and uptime are underrated aspects of supplier selection for projects like new intranets. However, you can be assured that we will keep you safe.

11.1. Supporting Secure Authentication

VerseOne supports a wide range of secure Identity Providers in order to keep your data safe. Primarily, VerseOne enables organisations to use all of the flavours of Microsoft's Active Directory (AD), connecting via ADFS and OIDC — as well as being able to leverage NHS-specific configurations such as the National Tenant and NHS Mail.

As expected, VerseOne's secure front-ends can use Single Sign-On (SSO) to seamlessly authenticate intranet or portal users. This enables organisations to control their own roll-out of security measures — such as Multi-Factor Authentication (MFA) — in line with their compliance obligations, and in a controlled manner.

For front-end logins, VerseOne DXP features a Multi-Factor Authentication Module, which can be configured to send One-Time codes via email or SMS; or for MFA to be undertaken via Biometrics for supported devices.

However, VerseOne DXP back-end administration panel can also be secured through SSO, whilst respecting the Permissions set within the DXP, i.e. only administrators can sign in to the back-end — whether through SSO or not.

VerseOne can also support “sectioned” areas of authentication, reserving some areas of a solution for SSO, and some for standard VerseOne DXP authentication.

Examples include:

- **customer portals in social housing** — residents can login using the DXP authentication (with or without the MFA Module or Biometrics enabled), but staff can login to support resident reporting through a seamless SSO section of the portal;
- **volunteers in NHS intranets** — most staff will login via seamless SSO, but volunteers are usually not maintained within AD; these people can login via a sectioned standard Authentication method.

Above all, VerseOne DXP offers our customers choices in how users should login, as well as future-proofing against future compliance.

12. Additional VerseOne Services on G-Cloud

The service described in this document is just one of many services that can be procured from VerseOne via G-Cloud. The full portfolio, with summary, is below.

12.1. Accessible Documents Creator to Convert Inaccessible PDFs into HTML for WCAG Compliance

From board papers to policy documents, many organisations are still heavily reliant on PDFs that are inaccessible and hard-to-read on mobiles, whilst being slow and heavy to store. Our Accessible Documents Creator converts PDFs into lightweight HTML and adds accessibility tools so that your content meets WCAG 2.2 AA standards.

12.2. AI-driven Content Management System (CMS) for NHS Organisations

This is a custom, healthcare package for the VerseOne CMS, a powerful, design-led content management platform. VerseOne CMS is the foundation for accessible and responsive websites, intranets, portals. VerseOne is a market-leading online digital transformation solution for housing associations and NHS organisations.

12.3. AI-driven Content Management System (CMS) for Social Housing

This is a custom, housing association package for the VerseOne CMS, a powerful, design-led content management platform. VerseOne CMS is the foundation for accessible and responsive websites, intranets, portals and channel shift systems. VerseOne is a market-leading online digital transformation solution for housing associations and NHS organisations.

12.4. Autevo Intelligent Integration Platform to Connect to Backoffice Systems

This is a custom, digital transformation solution for VerseOne Autevo, a powerful data integration layer that gathers information from business-critical systems via APIs. Autevo's intelligent mapping configurations

normalises and personalises these data streams, enabling seamless integration for portals, mobile clients and other integrated solutions — especially in VerseOne CMS.

12.5. Business Process Automator for Intelligent Data-driven Service Delivery and Improved Efficiency

VerseOne Business Process Automator (BPA) is a highly flexible process-building platform to leverage the power of customer's existing content and user profiles. BPA enables customers to translate their processes into defined actions, and then to simply build them as process templates within BPA, streamlining and digitising previously cumbersome workflows.

12.6. Clinical Service Portal for NHS for Automated Courses, Bookings, Information and More

Our portal capabilities can be used by clinical services including maternity, mental health, pathology, drop-in clinics, and more. We enable functionality like e-learning (videos and other self-service content), training, information delivery, booking for online and face-to-face courses, payment collection, and more.

12.7. DataSure for Social Housing to Automate Data Collection, Decision-making and Regulatory Compliance

DataSure works in conjunction with your data lake software to identify missing or inaccurate data, uses crowdsourcing to allow residents to keep their own data clean, and gives your workforce the ability to update records too. DataSure allows you to make data-driven decisions and achieve regulatory and legal compliance.

12.8. Employee Experience Suite for Intranets and Collaboration Portals for Greater Efficiencies and Employee Retention

Our Employee Experience (EX) Suite turns an intranet into a true employee engagement tool. With strong Microsoft integration – including Active Directory and SharePoint – we help your workforce get

personalised access to the people, policies, information and applications they need to do their job, and to collaborate in real-time.

12.9. Life Stories Therapeutic Communication Tool for Cognitive Impairment, Memory Loss and Dementia

Communication and collaboration solution helping people connect and communicate through creating and sharing their life stories, memories, and experiences securely and confidentially. Each story is unique enabling users, families, and clinicians to explore the past, present and future creating a personalised user centric solutions within a therapeutic or non-therapeutic setting.

12.10. Managed Cloud Hosting Services, Creative Services and Digital Services

We have a suite of services to augment our software offerings, including: Managed Cloud Services, featuring 99.99% uptime and repelling 100 million cyber-attacks per annum; Creative Services including Brand Development, UI/UX Design, User Journey Mapping, etc; and Digital Services, including Heatmapping, Google Analytics, SEO, and more.

12.11. Microsoft Integration to Products like Active Directory, M365, SharePoint, etc.

We are a Microsoft preferred Independent Software Vendor (ISV) and AI Cloud Partner. We integrate with Active Directory for user permissions, Single Sign ON (SSO) logins via Open ID Connect (OIDC), staff directories and more. Our SharePoint, OneDrive, Outlook, M365, PowerBI and Teams integrations power collaboration.

12.12. Prodigy for AI-Powered Content/Image Creation and Management and More

Prodigy is a growing suite of AI tools designed to assist with: content creation, e.g. through integration with Large Language Modules (LLMs) like ChatGPT; content management, e.g. through automatic deletion of out-of-date announcements; image selection and alt-tagging, e.g. through Azure Computer Vision; governance and compliance, and more.

12.13. Research and Innovation Portal for NHS to Manage Clinical Trials, Share Outcomes and More

Our Research and Innovation Portal helps NHS Trusts and other healthcare providers to raise public sector funding (e.g. through the Clinical Research Network) or private sector investment (e.g. through pharmaceutical companies). The portal automatically matches institutions, would-be researchers, potential participants, etc, to automate the programme management process.

12.14. Self-service Portal with Integrated Repairs Diagnostics and more for Social Housing Providers

Our self-service portal for social housing providers allows residents to serve themselves, pay their bills, log repairs and manage their account via a mobile-first browser or via a mobile app. This reduces call centre traffic and allows your customer service staff to provide higher levels of care to others.

12.15. Staff Recognition Solution for Automated and Peer-to-Peer Rewards Schemes

“Everyday recognition” is one of three categories in the NHS England Staff Recognition Framework. Our Staff Recognition Solution enables a fully automated, peer-to-peer scheme where users send recognition tokens to their colleagues, and once a predefined number of tokens are received, they’re eligible for a reward.

12.16. Vocoll Communication and Collaboration Tool and Intelligent Chatbot for Customer Service

Easily collaborate through frictionless digital interactions. Vocoll drives productivity through empowering collaboration between internal teams and external customers, through Live Support/Chat, Knowledge bot. Vocoll customer experience is further enhanced through a native Android or iOS mobile application, enabling true on-the-go interactions via push notifications.

13. Our Heritage

VerseOne was founded in 2004 by Alan Neilson (who remains our Executive Chairman and Owner to this day) to bring digital transformation solutions to the Social Housing sector. Very shortly thereafter, we moved into the NHS too, and those remain our focus today, along with local authorities.

Accessibility was a key founding principle too, and remains critical to our philosophy and approach. We are proud to be leading the UK public sector digital transformation market in building accessible sites and solutions.

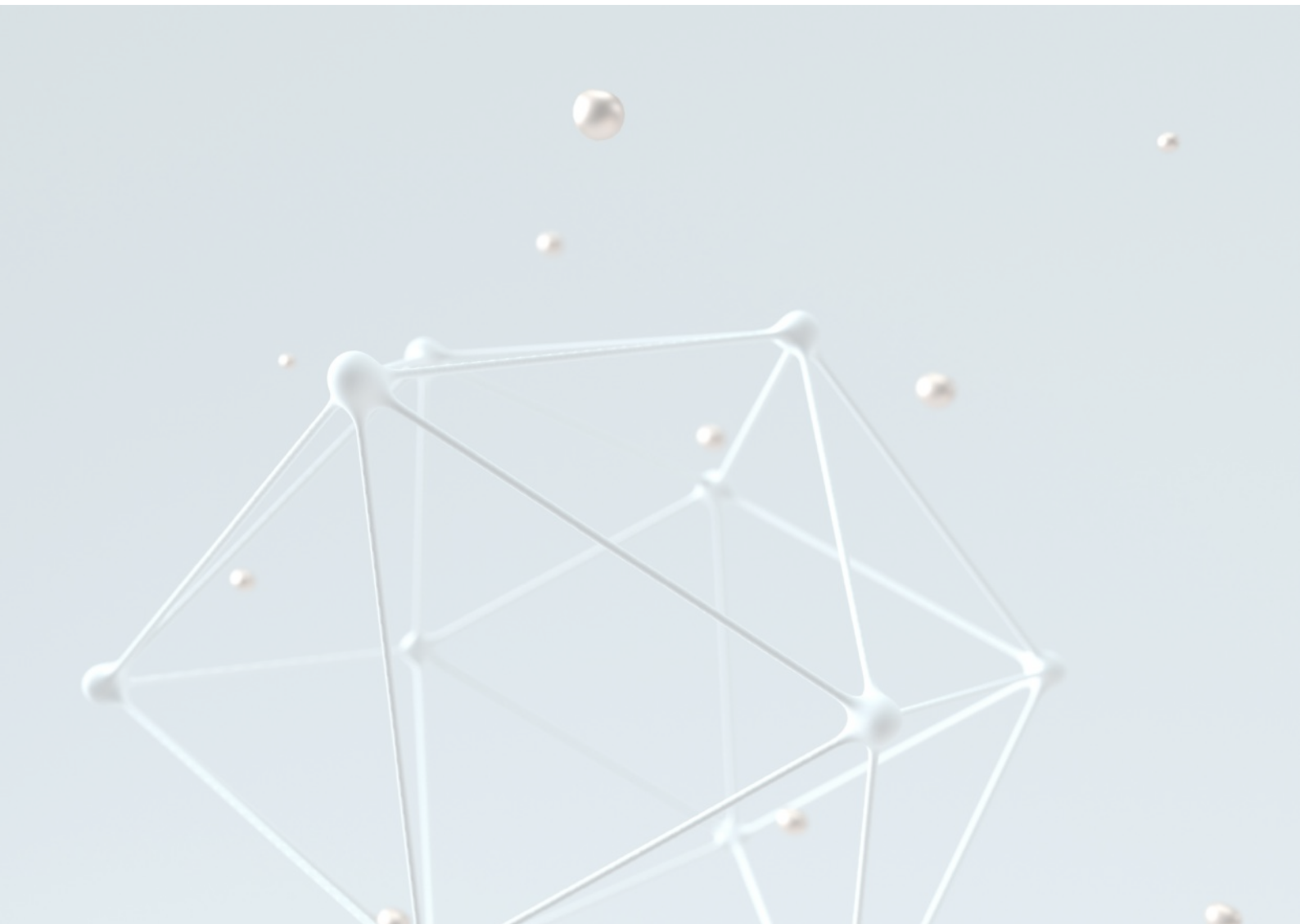
We are committed to being good citizens and we are always conscious of the need to provide quality and value to the tax-payer funded organisations that are our customers. As such, we are committed to giving a lot of value for free, particularly through our weekly webinar schedule, our six-monthly advisory boards and user groups, and our annual face-to-face conference.

The team at VerseOne is passionate about the power of technology for good and of helping our customers to achieve their purpose through the creation of transformative experiences.

14. Social Value (ESG)

VerseOne's mission to empower and improve the lives of individuals who rely on the NHS, Social Housing and other Care providers through the innovative use of technology is inherently compassionate, with social value being core to our existence. It has, for 20+ years, also defined our corporate culture, behaviours and our governance frameworks.

Environmental, Social and Governance (ESG) principles are fundamental at VerseOne and by prioritising environmental stewardship, social equity, and robust governance standards, we aim not only to mitigate risks but also to seize opportunities for innovation and growth for the benefit of our stakeholders. Our corporate culture and ESG policies underpin all our decision making and our long-term commitment to sustainable, equitable and responsible business practices. We continue our commitment to operate with integrity, respect diverse perspectives, and contribute positively to the lives of our customers, our staff and our community as well as the sustainability of our environment.



VerseOne R&I Portal

Service Description

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