

Sunrise Software

IT Service Management Service Definition Document

Company Overview

Who are Sunrise Software?

With over 30 years of industry experience, we offer service desk software designed to adapt seamlessly to your organisation's needs.

As a proud member of the Volaris group, we bring stability and innovation. Our commitment to excellence is underscored by our rare SDI reporting accreditation, a mark of quality and reliability that only two vendors in the market possess.

What sets us apart is our unparalleled suite of over 30 configurable modules, empowering businesses to tailor their service management platform precisely. From automating routine tasks with our AI engine, Solvyr, to enabling self-service capabilities, our software streamlines IT and HR processes with unmatched efficiency.

Join the ranks of leading UK businesses who trust Sunrise Software to elevate their service management. With our proven track record and forward-thinking approach, we're your strategic partner in optimising IT and HR workflows for success.

We are service desk people! Our Sunrisers have worked on service desks, managed service desks, built service desks, and even audited and improved service desks. Now, we are building service desk and IT service management solutions and services to help those people close to our hearts.

Why choose Sunrise as your ITSM partner?

- 1** With 30 years in ITSM, our experience speaks for itself, ensuring a top-notch solution for your tech needs.
- 2** We're not just software; we're all about building long-lasting relationships, some stretching over two decades.
- 3** Based in the UK, our focus is on personal connections - expect quick, efficient support whenever you need us.

Company Overview

- 4 Part of Volaris, a buy-and-hold-for-life company, ensures our solutions stand strong for the long run.
- 5 We're not just here to deliver; we're here to listen. Your feedback helps ensure we stay ahead and evolve with the trends.
- 6 Our scalable solution comes with over 30 configurable modules, allowing easy customisation that aligns perfectly with your needs.
- 7 Quality over quantity! We offer one AI-powered ITSM product, ensuring all our efforts are channelled into making it the standout choice.
- 8 Choose our UK-hosted SaaS option for enhanced protection with Falcon Complete, Rapid 7, Automox, Invicti Netsparker and Fortigate firewalls
- 9 Former customers turned employees, our team embodies the belief that when you find something good, you stick around.
- 10 We're an ITSM partner for organisations with the SDI Service Desk Certification and one of two recognised for SDI reporting compliant best practice standards.

Platform Highlights



Hosting options: Available either on-premise or a resilient cloud-based Software-as-a-Service.



Graphical process builder: The no code graphical process builder streamlines and manages the automation of workflows within the platform.



Self-service portal: Empower your end-users to handle issues independently, reducing service desk calls. Log issues, access service announcements, and view knowledge articles.



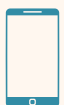
Seamless integrations: Integrate with any external compatible application including Office 365, Azure, Entra and Teams, allowing easy configuration in the integration's app, using the REST API feature. This ease of integration ensures greater visibility of critical information.



Fully Integrated AI: Solvyr AI, powered by Azure, removes friction, accelerates everyday service tasks, and supports better outcomes for Service Desks



Extend to other teams: Extend the platform across multiple departments, ensuring you maximise your service management investment.



Available on multiple device types: The platform can be viewed across a wide range of browsers and device types including mobiles, tablets, desktops and laptops. Using responsive design provides the optimum experience on whatever device you use.



ITIL 4 aligned: ITIL 4 compatible templates ensure fast implementation.



Solvyr is where Sunrise meets AI - built to help teams solve faster, serve smarter, and shine brighter.

Grounded in the belief that great service starts with people, Solvyr uses AI to amplify human expertise, not replace it. Seamlessly embedded into the Sunrise platform, it removes friction, accelerates everyday service tasks, and supports better outcomes, so service teams can focus on delivering exceptional experiences with confidence.

Auto Triage

Categorises and prioritises tickets instantly - ensuring precision, consistency, and speed from the very first touch.

Smart Resolution

Turns every fix into a clear, trustworthy record - transforming rushed notes into professional, knowledge-rich resolutions

Knowledge Creator

Automatically transforms enriched incident resolutions into publish-ready, ITIL-compliant knowledge articles.

Survey Sentiment

Reveals the true feeling behind every survey response, giving you deeper insight, clearer CSAT and smarter action.

Comms Boost

Three AI tools that turn vague, time-consuming communication into sharp, reliable, user-ready messages.

An illustration of a person with white hair, wearing a blue shirt and overalls, holding a large, light blue speech bubble. The speech bubble contains a quote. There are several smaller speech bubbles and starburst icons around the person.

“Solvyr came from running our own service desk. We had years of knowledge locked in our systems, but no good way to use it. I started exploring what AI could genuinely do, not the hype, but what actually works. When I saw what was possible, I knew this could transform how service teams work. That's exactly what Solvyr does.”

Chris Carswell,
Technical Operations Manager at Sunrise

Professional Services

Sunrise provides a number of onboarding packages with expert consultancy, training and support included. All projects are managed by our Project Office team which is included in the package prices. Please see the onboarding package details and prices.

	Quick Start	Standard	Enterprise
Sunrise ITSM Consultant	Included	Included	Included
Project Office Management	Standard Onboarding with Project Office Support	Standard Onboarding with Project Office Support	Bespoke project plan with project manager and Project Office Support
Project Services	Standard setup and configuration including Entra/ Azure Data Sync	Design and Discovery, advanced setup including Entra/ Azure Data Sync	As per bespoke project plan
Timescales	6 weeks	12 weeks	As per bespoke project plan
Delivery Method	Remote	Remote	Remote / onsite
Configuration Activities	Sunrise/ Customer	Sunrise / Customer	Sunrise
Inclusive Training	2 x 4 hour sessions	4 x 4 hour sessions	As per bespoke project plan
Customer Service Desk Support	Support available from day one	Support available from day one	Support available from day one

Professional Services

Sunrise onboarding projects are typically delivered within these timescales. However, should you wish additional weeks, these can be booked for an additional cost.

Additional Optional Services
Closed 2 Day Administrator Training Course (up to 6 delegates)
Public Administrator Training Course
Design and Discover Session - Silver
Design and Discover Session - Gold
Additional Professional Services Consultancy Days
Additional Private Training Days

Sunrise Standard Onboarding Process

Sunrise Software's purpose is to provide innovative and effective solutions to help people be more successful. We are therefore committed empowering your organisation to deliver your services and manage your process through our powerful software solutions.

Our Professional Services team will help your organisation by providing product expertise combined with business analysis skills and industry best-practice knowledge.

We want you to get the best out of your Sunrise system. However, it is not often easy to understand how to do this. Our consultants are experts in Sunrise systems and have a wealth of knowledge and experience in the Service Desk and ITSM industry, having worked on hundreds of customer projects. Therefore, they are ideally placed to lead the discussions regarding your business requirements and ensure the system changes are accurately captured before delivery.

Professional Services



1

Scoping and Planning

- Project initiation document creation & approval (PID)
- Project kick off
- Project plan documentation



2

Rapid Start System

- Installation of core system
- Licensing & security
- Core data imports



3

Training

- User & administration training



4

Requirements

- Requirements gathering & workshops
- Requirements
- Documentation including review & approval



5

Build and Test

- Configuration & QA
- Solution handover
- Requirements checking & UAT



6

Go Live Preparations

- Final changes & system testing



7

Support Handover

- Handover to Sunrise
- Customer service desk (CSD)



8

Go Live

- Go live
- Optional on-site support

Security

To ensure that our customer's data is secure, our UK based Microsoft Azure cloud data centres that host the SaaS service are covered by ISO 27001, ISO 9001, ISO 27017, ISO 27018, ISO 22301 (Business Continuity), SOC 1, SOC 2, and SOC 3, PCI DSS, CSA Star Certification and Cyber Essentials Plus.

The Sunrise security policies cover every area of IT security including vulnerability and patch management, network security, physical security, risk assessment and classification, password policies and disposal policies.

We have put in place appropriate security measures to prevent personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed and have various information security policies in place to which we adhere to. In addition, we limit access to personal data to those employees, agents, contractors and other third parties who have a business need to know. They will only process personal data on our instructions, and they are subject to a duty of confidentiality. We have put in place procedures to deal with any suspected personal data breach and will notify customers and any applicable regulator of a breach where we are legally required to do so.

Data Backup

The Sunrise SaaS service is business critical to our customers. Data is hosted in Microsoft Azure in a Type 3 data centre hosted within the UK, with redundancy and high availability built in. We operate both a primary and secondary data centre for Data Recovery and Business Continuity purpose.

Every 30 minutes, an incremental backup will be taken (disc to disc) and held locally within the primary data centre. Every 24 hours, a full online backup (disc to disc) of all databases (and attachments) is made and securely transferred by private connection to the secondary data centre.

Contract termination and access to data upon exit

At the end or termination of a customer's contract, Sunrise can provide the user with their data in SQL format as well as any related attachments. Users can also extract their own data from the product in CSV format. We will also provide the customer with a copy of their data in SQL format at no additional cost.

Service levels

Service Constraints

Updates are included in the SaaS offering, so the product always remains on the latest release. Any updates are completed outside of core customer hours and customers are notified in advance.

Emergency patches and security fixes are also completed out of core hours where possible and customers are always kept up to date with regular updates.

Service levels

Sunrise Software have split our service response into 4 separate categories:

- Priority 1: Target response of 1 hour and target resolution of 3 hours
- Priority 2: Target response of 3 hours and target resolution of 1 day
- Priority 3: Target response of 6 hours and target resolution of 3 days
- Priority 4: Target response of 1 day and target resolution of 5 days

Priority level is determined by disruption to the service rather than pricing or package subscribed to.

Outage and maintenance management

Outages are reported and visible on the customer self-service portal as well as via email alerts. We always work diligently to ensure that outages resolved quickly. Any regular maintenance is completed outside of core customer hours, with customers being notified in advance.

After-sales support

We provide a range of support for our customers after sales including email and online ticketing, phone, web chat and onsite support. Email and online tickets can be logged 24/7 and are monitored during standard support hours which are Monday - Friday, 8:30-17:30.

Customer Journey

In our ongoing commitment to providing exceptional service, fostering strong partnerships and improving your overall Sunrise journey, we have regular customer check-ins.

Here's why:

1) Shape our product and service with your feedback: Your insights matter! The check-ins will serve as a valuable platform for collating your feedback, helping us shape and enhance our products and services to better meet your evolving needs.

2) Strengthening partnerships through face-to-face meetings: We believe that regular face-to-face interactions are key to building and nurturing strong partnerships. These check-ins provide an opportunity for us to connect with you on a more personal level, understand your goals, and ensure that we're aligned in our efforts.

3) Comprehensive discussions across departments: Different check-ins will be led by various departments, including support, product, professional services, and general account management. This ensures that you have the opportunity to discuss a wide range of topics with the right person.

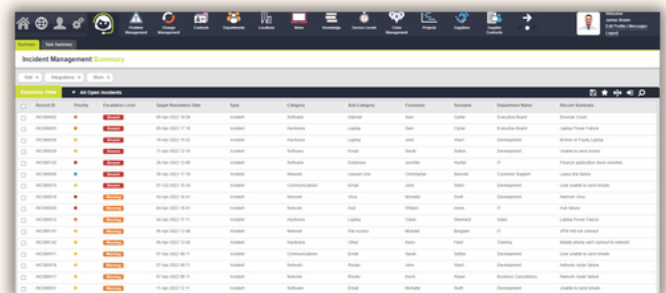


Key features - Service Desk

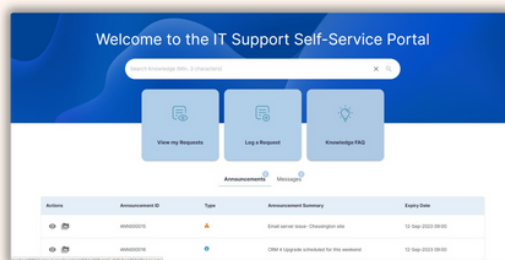
From incident management to self-service, our service desk modules are designed to keep your service desk efficient and your customer satisfaction levels high.

Incident Management

This provides our users a flexible way to log, track and resolve disruptions to their services. Users can speed up their incident classification, increasing their first call resolution. Incidents can be classified quickly, with a full audited history of all customer support interactions



Incident ID	Status	Priority	Category	Sub-category	Assigned To	Assigned On	Resolved On	Resolved By
INC000001	Open	High	Network	Internet	John Doe	2023-10-26 10:00		
INC000002	In Progress	Medium	Hardware	Laptop	Jane Smith	2023-10-26 11:30	2023-10-26 15:00	Jane Smith
INC000003	Open	Low	Software	Application	Mike Brown	2023-10-26 14:00		
INC000004	Resolved	High	Network	Local Area	John Doe	2023-10-26 09:00	2023-10-26 12:00	John Doe
INC000005	Open	Medium	Hardware	Mouse	Jane Smith	2023-10-26 16:00		
INC000006	In Progress	Low	Software	Web Browser	Mike Brown	2023-10-26 13:00	2023-10-26 17:00	Mike Brown
INC000007	Open	High	Network	VPN	John Doe	2023-10-26 17:00		
INC000008	Resolved	Medium	Hardware	Keyboard	Jane Smith	2023-10-26 10:30	2023-10-26 14:30	Jane Smith
INC000009	In Progress	Low	Software	Office	Mike Brown	2023-10-26 11:00		
INC000010	Open	High	Network	Cloud	John Doe	2023-10-26 12:00		
INC000011	Resolved	Medium	Hardware	Monitor	Jane Smith	2023-10-26 08:00	2023-10-26 11:00	Jane Smith
INC000012	In Progress	Low	Software	File Transfer	Mike Brown	2023-10-26 15:00		
INC000013	Open	High	Network	Firewall	John Doe	2023-10-26 16:00		
INC000014	Resolved	Medium	Hardware	Printer	Jane Smith	2023-10-26 09:30	2023-10-26 13:00	Jane Smith
INC000015	In Progress	Low	Software	Email	Mike Brown	2023-10-26 14:00		



Self- Service Portal

Our self-service portal empowers end customers to raise requests, search for solutions, or monitor existing known errors or outages. This reduces calls to service desk teams and increased productivity.

Request Fulfilment

Fulfil your service requests with our integrated service catalogue and request fulfilment processes. Users can create and sustain a published service catalogue from a definitive, approved library of products and services to categorise these requests which can be published via the self-service portal

Problem Management

Manage the process of digging deep for the underlying causes of customer issues by automatically searching the problem database for issues. Track the underlying root cause for all problems and reduce the impact by publishing known errors and workarounds within the knowledge base.

Key features - Service Desk

Knowledge Management

Users can compile and publish information such as symptoms, cause and resolution details across the service desk. This ensures that their customers receive a faster, more consistent response

Service Level Agreements

Track service levels for end-users, assets or departments, and set base targets against priorities for the hours you work. Keep on top with alerts to your inbox when your commitments are in danger of being breached.

Contact Management

We provide users with a centralised database of information, allowing them to build a comprehensive view of all contact interactions, the equipment they have and the demands they place upon IT. This increases the visibility of all user interactions.

Announcements

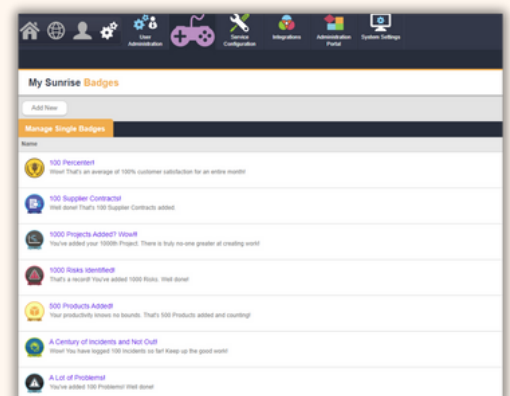
Sunrise ITSM allows users to make announcements to specific individuals, groups or full workforces, ensuring that all staff are up to date with the latest service desk activities. This reduces calls to the service desk and ensures that staff are proactive.

Service Catalogue

This allows our users to create and maintain a library of products and services. With this, customers can manage the services they need, meeting customer demands quickly.

Gamification

Gamification engages, motivates and rewards staff to improve customer service, resolve issues promptly and become more productive. This ensures that staff are motivated and focussed on delivering business goals.



Key features - IT Operations

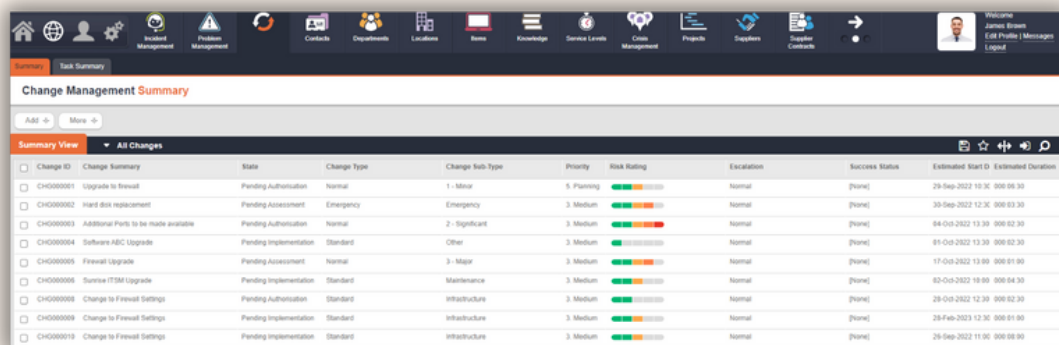
Sunrise ITSM provides the controls and processes to ensure that operational matters are effectively managed.

Configuration Management Database (CMDB)

Build a central store for all assets, whether hardware, software, IT services or anything in between. Associate assets to people, departments, locations and other services, to understand the impact of future changes and issues.

Change Management

Reduce change risk by managing, scheduling and communicating proposed future changes. Identify business impacts, and gain approval within change processes, and you'll be in control every step of the way.



The screenshot displays the 'Change Management Summary' interface. It features a top navigation bar with various icons for ITSM functions. Below the navigation bar, there's a 'Change Management Summary' section with a search bar and a 'Summary View' tab. The main content is a table listing change requests with columns for Change ID, Change Summary, State, Change Type, Change Sub-Type, Priority, Risk Rating, Escalation, Success Status, Estimated Start D, and Estimated Duration.

Change ID	Change Summary	State	Change Type	Change Sub-Type	Priority	Risk Rating	Escalation	Success Status	Estimated Start D	Estimated Duration
CHG000001	Upgrade to firewall	Pending Authorization	Normal	1 - Minor	5 - Planning	Low	Normal	[None]	29-Sep-2022 10:30	000:00:30
CHG000002	Hard disk replacement	Pending Assessment	Emergency	Emergency	3 - Medium	High	Normal	[None]	30-Sep-2022 12:30	000:03:30
CHG000003	Additional Parts to be made available	Pending Authorization	Normal	2 - Significant	3 - Medium	Medium	Normal	[None]	04-Oct-2022 13:30	000:02:30
CHG000004	Software ABC Upgrade	Pending Implementation	Standard	Other	3 - Medium	Low	Normal	[None]	01-Oct-2022 13:30	000:02:30
CHG000005	Firewall Upgrade	Pending Assessment	Normal	3 - Major	3 - Medium	High	Normal	[None]	17-Oct-2022 13:00	000:01:00
CHG000006	Service ITSM Upgrade	Pending Implementation	Standard	Maintenance	3 - Medium	Low	Normal	[None]	02-Oct-2022 18:00	000:04:30
CHG000008	Change to Firewall Settings	Pending Authorization	Standard	Infrastructure	3 - Medium	Low	Normal	[None]	29-Oct-2022 12:30	000:02:30
CHG000009	Change to Firewall Settings	Pending Implementation	Standard	Infrastructure	3 - Medium	Low	Normal	[None]	28-Feb-2023 12:30	000:01:00
CHG000010	Change to Firewall Settings	Pending Implementation	Standard	Infrastructure	3 - Medium	Low	Normal	[None]	29-Sep-2022 11:00	000:00:30

Release Management

Group multiple changes together into a single release package, simplify your rollouts, and never miss a release target again. Track problems, known errors, and further change requests associated with each of your releases.

Product & Order Management

Gain complete visibility and control of your incoming IT by publishing a list of approved products, and managing orders from quotation, to approval, confirmation, and through to delivery on-site.

Key features - IT Operations

Project Management

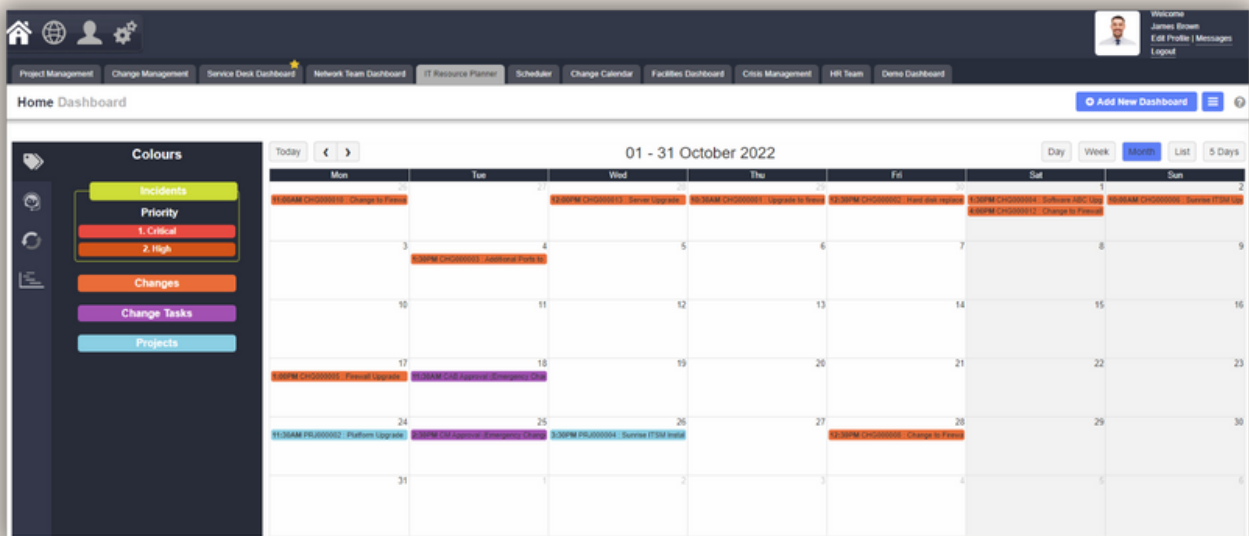
Monitor project progress against agreed milestones and keep projects, outstanding tasks, and the resolution of pending issues, visible and on-target at all times.

Event Management

See through the “noise” of constant alerts from your monitoring tools. Monitor the most critical issues with your IT equipment and generate new incidents or changes when event thresholds are exceeded.

Resource Planning

Our resource planner provides users a comprehensive toolkit to view and schedule resources, with multiple types of views available.



Key features - IT Business Management

Everything that the IT team needs to be effective and in shape to support the needs of the business – not just the IT department.

Contract Management

Managing thousands of contracts spanning hundreds of partners and suppliers can be a time-consuming process. Manage your contracts centrally and link them with suppliers and the services or equipment they provide.

Customer Contracts

Deliver the right services, to the right customers, at the right time. Build a centralised customer contract database and improve visibility of customer-specific contract terms.

Supplier Management

Maintain a complete view of all your supplier activities, what they supply and their overall performance, by tracking and tracing their contributions to the delivery of your service to your customers.

The screenshot displays a web application interface for viewing a specific contract record. The title bar reads "Supplier Contracts CTR000002 Viewing a Record". Below the title bar, there are tabs for "Add", "Actions", and "More". A banner indicates "YOU ARE VIEWING HP PRINTER SUPPORT CONTRACT". The main content area is divided into two columns. The left column, titled "View Contract Details", contains fields for Contract ID (CTR000002), State (Active), Contract Type (Hardware Support), Contract Name (HP Printer Support Contract), Description, Special Terms, Start Date (31-Oct-2019), End Date (31-Oct-2022), Review Date (31-Oct-2022), Contract Reference (12345), Minimum Term (3 Months), Minimum Notice Period (1 Month), and Purchase Order Number (234567). The right column, titled "Primary Contact", contains fields for Contact ID (CON000004), Forename (Michael), Surname (Bington), Job Title (Senior Technical Consultant), Telephone (0208 1953271), Extension, Email (m.bington@yourcompany.com), and Contract Owner Details (Contract Owner and Owner Group). Buttons for "Edit Record" and "View Record" are located at the top right of the right column.

Risk Management

Build a standardised approach to risk management across your IT estate, and other operational areas, and proactively manage known risks and their mitigation strategies.

Key features - IT Business Management

Audit Management

Reduce the complexity of your compliance processes, and ensure full traceability and visibility of your audit results. Build confidence in processes and demonstrate compliance.

Training and Skills

Streamline training requests and approval processes, and see a complete picture of all delivered training and the skills acquired by your staff.

The screenshot shows a web application interface for viewing a training record. The title bar reads "Training TRA000001 Viewing a Record". Below the title bar are tabs: "Add Course Details", "Actions", "Actions", and "More". A banner below the tabs states "YOU ARE VIEWING SUNRISE ITSM TRAINING". The main content area is divided into two columns. The left column, titled "Training Details", contains a table with the following data: Course Code (ITSM), Training Summary (Sunrise ITSM Training), Course Type (Specialist), Delivery Method (Classroom Training with Instructor), Training Location (Chesham), Start Date (21-Oct-2019 00:00), Training Length (2.0), Cost (750), Maximum Attendees (5), Booked Attendees (1), Allow Overbooking? (Yes), and Publish? (Yes). The right column, titled "Course Information", contains a Description (Standard 2 day user training) and Training Prerequisites (No prerequisites).

Work Orders

Ensure the efficient and timely completion of internal and external Work Orders, and never lose track of outstanding activities again.

Time Cards and Expenses

Keep tabs on all time taken and expenses incurred in supporting, maintaining or implementing your IT strategy, and reduce the likelihood of hidden support costs.

Crisis Management

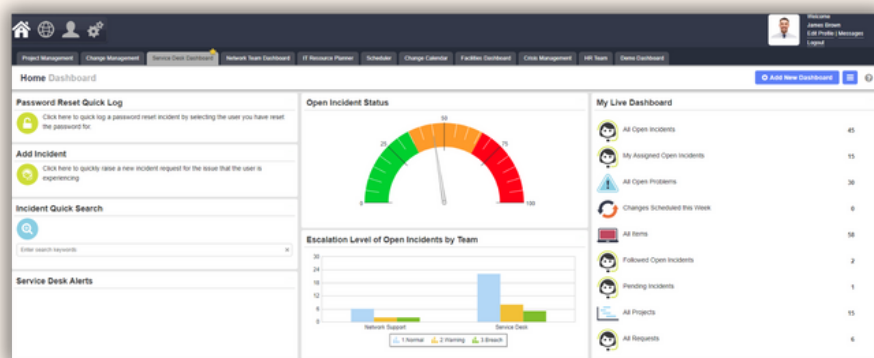
Unprecedented circumstances may dictate that the organisation has to move quickly. Sunrise ITSM supports your need for centralised management of impact, tasks and risks related to a Crisis, giving you improved visibility and control and helping you to make better-informed decisions.

Key features - Reporting and Analytics

Whether you need to track historical data or capture real-time information Sunrise ITSM includes powerful reporting options.

Dashboards

This allows our users to create dashboards that are specific to group's core roles. They can customise the layout and gadgets of these and gain a real time visibility of core metrics.



Wallboards

Users can monitor their key performance indicators and benchmark them over time, with a range of comparative visualisations. This allows users to have a proactive management of resources and increases visibility of KPI's.

Service Desk Institute Performance Reports

We're an ITSM partner for organisations with the SDI Service Desk Certification and one of two recognised for SDI reporting compliant best practice standards, helping those who are working towards their SDI accreditation.



Reporting Compliant
with the Global Best
Practice Standard For
Service Desk V.8.0

Management Reporting

Our internal report designer allows graphical and tabular reports to be designed over a rolling 12-month period, which provide an insight into operational information and key performance metrics.

A Trusted, Life-long ITSM Partner

We're delighted to be one of the trusted ITSM partners for businesses across the UK. From the NHS, education, councils, and fire and police services in the public sector to finance, tech, legal, and property management in the private sector – we've got the pleasure of working with some fantastic businesses.

Many of our clients have been with us for a whopping 15 years. Some of them have even become part of the team – a testament to the fact that when you find something good, you stick around.



Get in touch



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