

Sunrise Software

HR Case 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.

Company Overview

Why choose Sunrise as your HR partner?

- 1** With 30 years in service management, 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.
- 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** Former customers turned employees, our team embodies the belief that when you find something good, you stick around.

Solvyr™

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.



“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

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 HR teams



Flexible scalability: Our scalable solution comes with over 30 configurable modules, allowing easy customisation that aligns perfectly with your needs.



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.

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 also 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

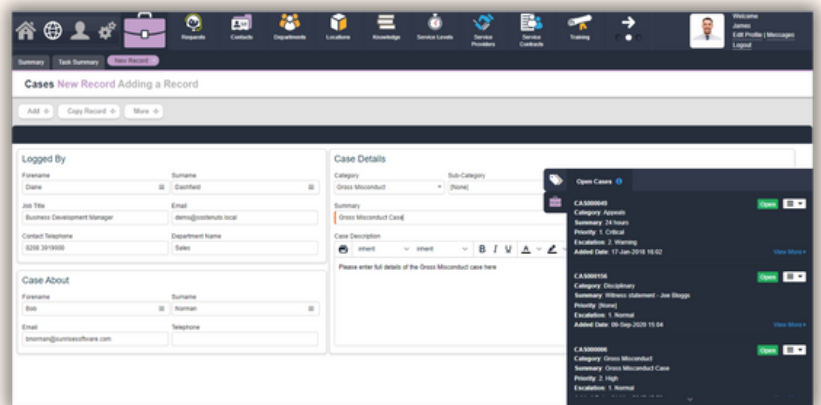
We provide a range of support for our customers after sales including email and online ticketing, phone, web chat and onsite support. Email and online tickets can be logged 24/7 and are monitored during standard support hours which are Monday - Friday, 8:30-17:30.

Key features - HR Case Management

HRCM service desk provides a centralised location to track all queries and cases efficiently and effectively

Case Management

Gain tighter control and have full visibility of your transactional queries and cases in one central location. Whether a simple query or a more complex case, HR teams have a flexible way of logging, tracking and resolving them in one central location and with an audit trail for future reference.



Self- Service Portal

Let your employees interact with your HR team using a simple browser-based, Self-Service portal. Empower users to raise new issues, search for solutions, or monitor existing inquiries.

Request Fulfilment

Employees can request information they need at any time of day, such as a copy of the employee handbook, P60's or employee benefits. Employers can then record and report on these requests

Documentation

This gives the ability to add and create standard letter templates for HR staff, who can print these off at any time.

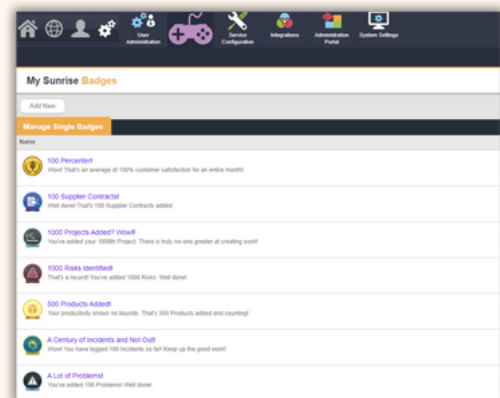
Key features - HR Case Management

Service Level Agreements

Keeping control of Service Level Agreements (SLAs) is a critical element of successfully delivering against HR's key performance indicators and ensuring continued employee satisfaction as you resolve their queries and cases.

Gamification

Engage, motivate and reward your HR team members with gamification. Earn badges for great customer service, compete in challenges against peers and level-up to show everyone your support prowess.



Announcements

Ensure everyone is up-to-date with the latest Human Resources related information by publishing announcements to HR team staff and employees.

Email

Sunrise HRCM monitors inboxes and automatically processes them, managing the volumes of emails.

Key features - Employee management

Provide quality employee support with easy access to your employee's latest and most accurate information when you need it

Candidate and Employee Management

This consolidates employee details into a central location to assist with case and request resolution. Employee information can be tracked including the history of the employee. Employees can also update their personal information using the self-service portal or alternatively the information can be automatically updated via an integration with your HR employee database.

Employee Feedback

Provides the ability for employees to give feedback on how their request or case has been handled.

Training and Skills

Streamline training requests and the approval process, and see a complete picture of all delivered training and the skills acquired by both your HR team and employees

Idea Management

Staff can voice ideas for the company, which are reviewed, approved and scored according to their business impact. This encourages innovation and creativity in the workplace

Key features -

Service Provider & Contract Management

Service Provider Management

Sunrise HRCM allows you to track the details of each service provider and the underpinning contracts for the services they provide, including start and end dates, costs and any special terms and conditions.

Product and Services Management

This provides the ability to manage products and services that may be needed when handling cases and requests from employees.

Service Provider Contract Management

Sunrise HRCM allows you to manage your contracts easily and efficiently in a central location, tying them to Service Providers and the products or services they provide.

Key features - Reporting & Analytics

A wide range of easy-to-access reporting options that will provide the information you need, when you need it

Dashboards

Securely display the important information you need to see and in the way you wish to see it with a series of configurable dashboards and gadgets, with quick access with a single click.

Wallboards

Gain real-time visibility of your HR team's Key Performance Indicators (KPIs) with this range of comparative visualisations that can be displayed on your PC, your tablet or on a monitor for the whole team to see.

Management Reporting

Our internal report designer allows both graphical and tabular reports to be designed with ease. These can be published and shared and exported quickly to external reporting tools. The benefits of all of these features include:

- Centralised employee queries, cases & documents
- A consistent level of service
- Increase of proactivity by using data trends

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.



GET IN TOUCH



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