



G-CLOUD 15 (RM1557.15) SERVICE DEFINITION DOCUMENT FOR PROCESS DIRECTOR

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Crown Commercial Service

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Crown
Commercial
Service
Supplier





SERVICE DESCRIPTION



Process Director

Process Director is a business process automation platform that empowers citizen developers and IT teams to build business applications that automate and improve their most critical processes. The no-code\low-code platform delivers an intelligent combination of integrated technologies out-of-the-box, including:

- Electronic forms
- Workflow and business process modelling
- Reporting and business activity monitoring (BAM)
- Business rules engine
- Personalised workspaces
- Case management
- Content and document management
- Artificial intelligence (machine learning / sentiment analysis)
- Application integration
- Software Development Kit (SDK)
- Cloud, on-premise, or hybrid deployment
- UK and worldwide data centres

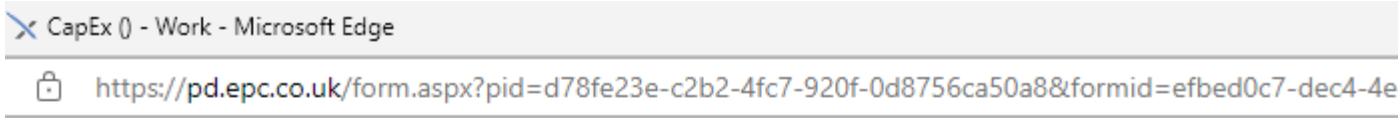
The platform has been in continual development since the mid-2000s. To date, it has been sold to 200+ companies/ organisations (with 1,000,000+ users) across the world.

As their European implementer, ePC has delivered several Process Director systems in recent years for the likes Rentokil Initial and Millennium Hotels and Resorts.

Electronic forms

Process Director enables process owners and developers alike to create user-friendly, responsive online forms to gather and display information.

Process Director provides several ways of building these forms, with the results appearing the same to the end-users. These options include the online form builder for easy drag-and-drop creation and Microsoft Visual Studio for developers.



CAPEX APPROVAL FORM

Request

Unit

Category

Priority

Title

Person responsible

Description

Please note: All fields with a red border are mandatory

Values are in GBP.

REQUEST		FINANCIALS		ATTACHMENTS		SUBMIT	
Cost / Saving	Type	FY 24		FY 25		FY 26	
		H1	H2	H1	H2	H1	H2
Costs	-- select --						
Add cost	Total costs	0	0	0	0	0	
Savings	Sales						
Savings	Costs						

Some of the key features include:

- Dynamic forms software
 - Show/hide, protect/unprotect fields or entire sections on forms
 - Set form behaviour based on easily configured conditions (e.g., "show this section only while in workflow step A")
 - Responsive forms automatically adjust appearance depending on devices
- Form validation
 - Automatically validate common inputs such as phone numbers and email addresses
 - Simple point-and-click configuration for more complex validations (e.g., "end date is at least 30 days after start date")
 - Invalid fields automatically highlighted for easy correction
 - Validate data on input or form submission
 - Validate input against external data sources
- Secure access
 - Display only information the end user needs and is permitted to see
 - Form access controlled by fine-grained permissions
 - Securely present forms outside the firewall without compromising internal applications or data
- External database integration
 - Fill dropdowns, search for information, or pre-populate fields - *all without coding* - using Process Director's intelligent data connectors
 - Connect to data sources via SQL, web services, file uploads, and more.
- Routing slips
 - Permanent record of every task performed and its result
 - Provides verifiable confirmation of approval, rejections, or other actions
 - Include comments, user pictures, electronic signature technology

We love the simplicity of the system. The actual form has not changed much. You now complete it online. It still captures all the same information. Crucially, the quality of submitted requests has improved as certain fields are auto-filled, calculated automatically or contain rules such as a mandatory field or display a warning if certain conditions are not met.

Nick Taylor
Finance Director
Millennium Hotels

Workflow

Process Director is the only workflow software to offer two powerful models for building and executing your business workflows: a traditional flowchart model for linear workflows and the patented Process Timeline. Process Timeline allows you to create easily modifiable, highly parallel and exquisitely time-aware workflow processes. Additionally, you can combine legacy linear workflows and advanced Process Timelines to create rich, sophisticated processes that take advantage of the strengths of each model as needed.

Every Process Director task can be configured to trigger escalations (automatic reassignment to another user, such as a supervisor) and notifications (with configurable frequency and recipients).

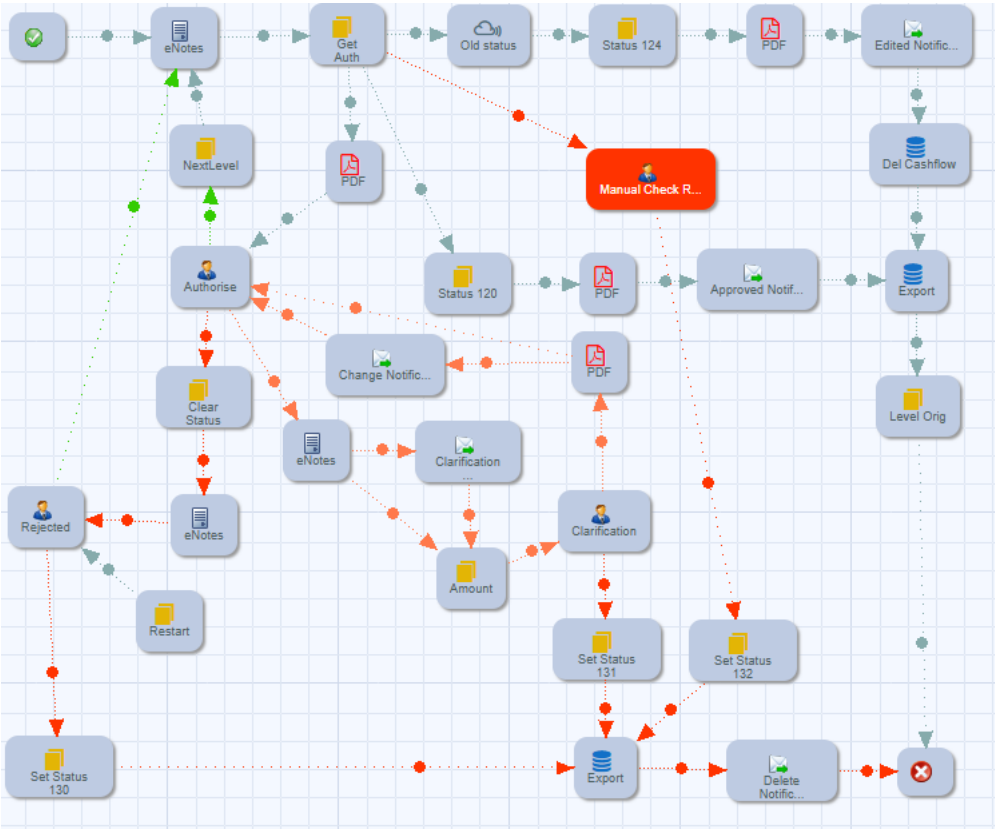
Linear workflow

When thinking of workflows, most people think of flowcharts that link one step after another into a chain. Many business processes work well when thought of this way and Process Director allows you to represent a string of events in a flow chart with design principles such as decisions, parallel steps, loops, approvals, notifications etc.

Workflow definitions in Process Director are created in a graphical interface and consist of a series of logical steps, each of which is linked by branches to the previous and subsequent steps. The workflow defines the path or route that a form or document must take. Each step in the workflow path defines the task type, the participants, and the rules that govern how the workflow will advance or transition through each possible branch to the next step.

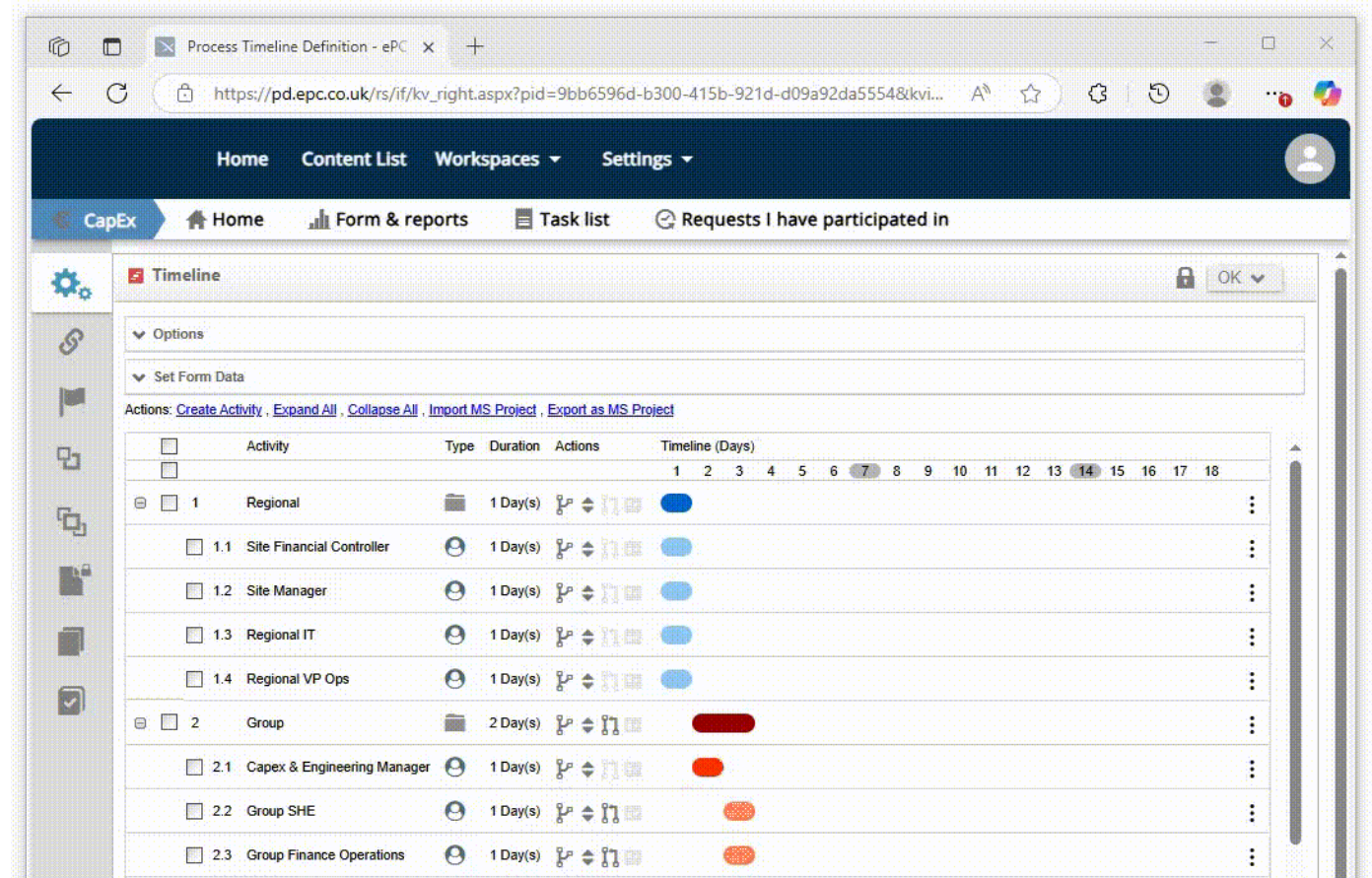
Designers can implement branching, recursion, parallel and/or serial tasking, and essentially unlimited levels of approval or user tasking.

Every Process Director task can be configured to trigger escalations (automatic reassignment to another user, such as a supervisor) and notifications (with configurable frequency and recipients).



We were mindful of the CapEx – and product creation – systems ePC had implemented and aware they worked well. The system had a lot of ticks against it and we did not see the value of going to another supplier.

Robert Woods
Finance Manager
Initial



Process Timeline

Process Timelines offer the earliest possible notification that some future task is predicted to be late. And it can do more than just notify you: this workflow engine can take direct action, escalating or re-routing activities to account for the predicted delay.

No complex flowcharts

Simply list your tasks, and Process Timeline builds an easy-to-follow Gantt-style chart.

In a point-and-click interface, you can add/modify activities, identify new dependencies, or change anticipated activity durations and Process Timeline automatically updates the chart to reflect the effect of those changes.

A powerful alternative to BPMN

Process Timeline™ has been designed to address non-linear processes; those processes that cannot be easily represented in traditional BPMN flowcharts, making it ideal for activity-based processes that may be able to run tasks in parallel. This makes it perfect for achieving efficiency gains by identifying where multiple steps can be run concurrently, rather than delaying one task simply because another task has not yet finished.

As a result, every Process Timeline activity will execute as soon as it is eligible to do so. At any given moment, every activity that can be running, is running.

No nasty surprises

Process Timeline provides alerts for a variety of due date and time-related conditions. For example, a manager can be notified when a task is nearly due, or overdue. However, it goes beyond simple due date notifications. Only Process Timeline offers the earliest possible notification that some future activity or task is predicted to be late – perhaps days or weeks (and many steps) before it has reached that point in the workflow.

Constantly assessing each running process to determine if any future activity is likely to be delayed, Process Timeline can notify you or take direct action to escalate or re-route activities to account for the predicted delay. No other workflow automation software can offer you this innovative, patented technology.

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What continues to set Process Director apart from its BPM and Case Management software competitors is the Process Timeline™ – an executable process model that presents a Gantt-chart oriented notation. The Process Timeline captures time as a formal process dimension in ways not possible with other models. For example, although both BPMN and CMMN support “timer” events for setting deadlines and triggers, what they cannot do is capture – in any formal way – either elapsed time nor anticipated impact on completion time resulting from unplanned events.

Nathaniel Palmer
Principal Analyst, BPM.com

Business rules engine

In a graphical point-and-click environment, non-technical users can encapsulate their organisation’s procedures, processes, and policies as a named, reusable business rule.

Once activated, the rule can be utilised in any number of forms and workflows to conditionally control how they should run and behave in various conditions (for example, send the form to CEO if the purchase order is above a certain threshold or seek approval from Corporate IT Director for all computer related expenditure).

Easy configuration

Using the point-and-click condition builder, you can build highly dynamic workflow processes; assigning tasks and choosing process paths based on process data, external conditions, and user activities.



Business activity monitoring (BAM) and reporting

Process Director is web-based and accessed through intuitive web workspaces for managing forms/processes and task management.

Users are assigned bespoke web workspaces tailored to their roles (for example, Initiator, Approver, Manager, Administrator) where they can:

- Initiate forms
- View task lists
- Find the current location of any in-progress requests
- Search for and review historic requests

Business activity monitoring (BAM)

Additionally, the web workspaces act as a management dashboard to display information on many aspects of the system such as numbers of requests, values, times taken etc. These dashboards are called Knowledge Views in Process Director and enable users to build flexible reports, graphs, and dashboards – without the assistance of IT.

Get real-time visibility into your processes

Crucially, the dashboards provide management with real-time visibility into how in-flight processes are running. This means they can easily discover bottlenecks in the process and intervene, if needed, to keep things running smoothly.

Although Process Director supports dashboards, as well as scheduled and on-demand reporting, we understand that for many users, a simple Excel spreadsheet is often the most flexible way of accessing data. Therefore, data can be automatically exported to pre-defined Microsoft Excel templates. Forms and reports can also be saved as PDFs for offline review.

Application Integration

Process Director supports direct integration, web services and REST calls, giving you access to a huge variety of in-house and third-party services.

No scripting or coding is required; and, in most situations, no SQL is required either. Simply select the database you wish to access, and the database connection wizard will assist you in selecting the tables and columns you need.

Once the call is complete, the results are integrated directly into your forms and workflows to fill drop-down menus, set form fields, or drive process behaviour.





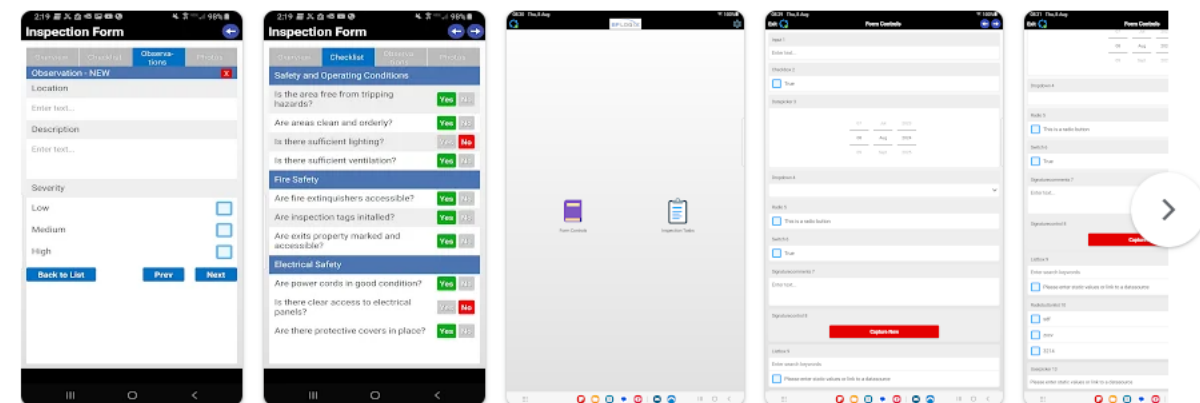
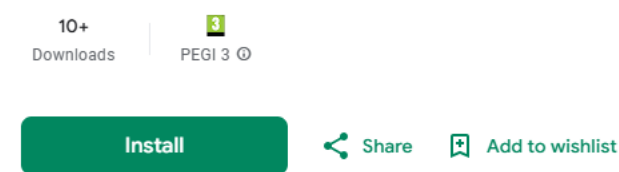
Process Director mobile app

Process Director's Mobile App component enables you to use a mobile application that supports both online and offline form submission on phones, tablets, and other mobile devices. Forms can be filled out by mobile users even when the user has no internet connectivity on the mobile device, and the mobile application will sync form instances with the mobile server when internet connectivity is restored.

The Mobile App is available on [Google Play](#) and [Apple Store](#).

BP Logix

BP Logix



About this app →

Process Director by BP Logix is a low code/no code platform that enables users to develop their own applications. The BP Logix mobile application enables forms that are created in Process Director to be completed on a mobile device. Forms may be completed while offline and are synchronized automatically with Process Director after establishing connectivity.

Additional features

Case management

Case management is an out-of-the-box feature of Process Director enabling you to build, route and monitor human-directed casework that is non-linear, unpredictable and includes any combination of other sub-forms, processes, or workflows.

AI and machine learning

Process Director embraces a sophisticated suite of AI and machine learning tools that continually evaluate data to make predictions in real-time about process behaviour and intervene (if necessary) to make appropriate operational improvements.

Low-code development

Process Director is a low-code platform and includes graphical and menu-driven builders for every part of your application: forms, rules, workflows, data connections, etc.

It enables business users (not just programmers) to build forms and workflows via drag-and-drop tools, templates, and pre-built data connectors.

Content and document management

Collaborate simultaneously on documents, spreadsheets, and presentations - without leaving Process Director. Easily annotate, add comments, and store documents for review. Other features include access control, versioning, rollback, attribution, and automated disposition.

Software Development Kit (SDK)

Process Director is built around Microsoft technologies. The preferred back-end database (which has a documented schema) is Microsoft SQL Server with the web front-end being hosted in Microsoft IIS and built on the .NET platform.

This means that it is possible to create custom tasks for the system or implement scripts within forms or workflows using VB.NET or C#.NET. Both SOAP and REST web services are supported out-of-the-box and although it is rarely needed, client-side scripts can be built using JavaScript and jQuery with forms using standard HTML5 and CSS3 features.

Bespoke scripts and custom tasks can be reused and mapped to form events (e.g., buttons, or field changes) or used in Process Timelines as Activities or Workflows as Steps. This allows custom logic to be developed once and re-used across many form definitions without any additional scripting.

Collaborative document authoring

For cloud installations of Process Director, document attachments may be edited using Collaborative Document Authoring, as an optionally licensed component.

Users can open the document in an online document editor for Word, Excel, or PowerPoint, instead of downloading a copy of the document to the local computer. Change tracking is automatically enabled in Collaborative Document Authoring so edits from multiple authors can be reconciled, accepted, or rejected.

Collaborative document markup

Document attachments may be annotated using Collaborative Document Markup, as an optionally licensed component. This tool enables the user to add comments, callouts, and other annotations for the following document types: DOC/DOCX, XLS/XLSX, PPT/PPTX, TXT/CSV, and PDF.

Markups and comments may be added or edited by end users using the Markup tool, whilst preserving the original underlying document in its original state.



Single sign-on

Support for SAML-based authentication for SSO with your existing corporate user directory.

Integrate with directories such as on-premise Active Directory (AD) and cloud-based Microsoft Entra ID (formerly Azure Active Directory).

Role-based access control

Create named user accounts and set granular permissions to track activity and prevent unauthorised access to workspaces and sensitive documents.

Full auditing of account delegation for when a user is away from the office.

Data encryption

The system uses standard web security protocols (such as HTTPS over TLS 1.3) to encrypt data in transit.

Multiple layers of encryption are used for all data at rest.

Audit trails

Track and record every transaction (reviews, edits, approvals/rejections, comments, and other actions) so they can be retraced later by managers, auditors, and regulators.

Multi-factor authentication (MFA)

Integration with industry-standard identity and authentication platforms allows you to incorporate MFA into the user logon process.



ePC understood what we wanted. On a number of occasions, we described roughly what we would like in terms of capability but not in any great detail. They captured the simplicity of what was required without compromising on functionality.

Nick Taylor, Finance Director
Millennium Hotels

Automate additional processes

Process Director can be re-used throughout your wider business for other processes and tasks, removing the need to procure multiple systems and enabling you to multiply your return on investment many times over.

Once you have successfully rolled out the technology for the initial process(es), it can be quickly deployed elsewhere, as you have an existing agreement in terms of users, reusable components, and management buy-in.

An example of this approach is Rentokil Initial, the global pest control and hygiene services provider, who initially automated their capital expenditure request approval process in Europe. They subsequently rolled out the technology to their APAC, Latin America, and US operations and went on to create additional automated workflows for their M&A, Procurement and R&D divisions.

Case studies

Rentokil Initial

- Automate procurement cost savings, M&A, and capital expenditure approval
- Used throughout Rentokil Initial group including Initial THS, CAWE, central group procurement and finance
- Cloud based deployment
- All forms are multi-lingual to support worldwide user-base
- Subsequently rolled out to operations in Europe, Asia, Latin America and the USA

Millennium Hotels and Resorts

- Automate capital expenditure approval, new supplier enrolment, and contract approval
- Services approximately 100 hotels and resorts worldwide
- Cloud based deployment
- Complex approval workflows with up to 28 steps



Customer solutions

Government/public sector

Use cases include: Census, surveys, market research, licenses, and permits.

Education

Use cases include: Admissions application, tuition fees and maintenance loans, class scheduling, coursework submission, student/course satisfaction, student loans and financial aid, enrolment, student portals, and student accommodation.

Healthcare

Use cases include: Audit of drug charts, controlled drugs contractor self-assessments, claims forms, competency assessments, clinical trials, data for quality improvement work, discharge turnaround times, intervention data medicines reconciliation, on-the-spot concerns, patient surveys, patient record management, patient encounter, patient consent, patient registration, patient admissions and release, patient charge capture, patient-reported outcomes, pre-registration and diploma audits, pre-operative assessments, prescribing audits, prescription orders, mandatory assessments, and staff satisfaction surveys.

Human resources

Use cases include: New hire onboarding, expense reimbursement, holiday and annual leave requests, employee offboarding, employee portals, and performance appraisal.

Finance

Use cases include: Capital expenditure, invoicing processing, purchase requisitions, claims processing, insurance underwriting, expenses, accounts payable (AP), and timesheets/timecards.

Mergers & acquisitions

Automate M&A activity including pre-deal activity and post-merger integration.

Health and safety

Use cases include: Accident report/incident notification, dangerous occurrences, COSHH assessment, display screen equipment assessment, working at height, lone working, manual handling, risk assessment, fire safety assessment, first aid, confined spaces, forklift truck risk assessment, scaffolding inspection record, safety inspection cards, PPE register, method statement, occupational hygiene monitoring, sports injury report, and health and safety checklists.

SharePoint workflow alternative

Migrate your SharePoint workflows to Process Director.

PROFESSIONAL SERVICES



Process Director is a powerful business process automation (BPA) solution that allows organisations to map out their processes and implement them electronically with an array of tools; such as electronic forms, automated workflow, business rules, document management, web portals and dashboards.

Process Director's design and development environment is designed to be approachable for both normal IT-literate business analysts and departmental users. It includes some unique features, such as its Online Form Designer (OFD) and workflow builder, to speed up the learning curve required to start building solutions.

However, understanding a business' requirements, predicting how these will interact with IT resources and end-users and building the right solution requires a level of IT skill, design, experience and time. ePC can assist you in one of two ways, or a mix of the two, to help you achieve this. Firstly, we can provide licences, training and support to your own IT and business analyst team to empower them to build your forms internally or, secondly, we can discuss your precise requirements before building a fully operational bespoke solution for you.

We have outlined below our approach to deploying a cloud-based solution to automate your business process(es).

ePC will provide all services (consultancy, development, implementation, training, and technical support) from our Head Office in Lightwater (near London), UK.

Requirement gathering

Reviewing new products and evaluating suppliers can be time-consuming and hard to know if you are making the right decision. Never interested in the hard sell, we aim to build a long-term partnership with you and our preliminary conversations help us to understand your needs and environment.

We understand every business is different and often seemingly small details can be crucial to your way of working. Although our team have advanced technical skills, we also pride ourselves on understanding your business beyond just technical requirements; if we understand the reasons behind interacting roles and resources rather than just their existence, it helps us to build a better solution.

Initially, we will attend one or more meetings to understand what you want to achieve and how you operate. It is important to spend time with the process owners and users to understand what problems you are trying to solve. During this stage, we will discuss many areas including the:

- Current "As Is" process and what your "To Be" or "Future" desired state looks like
- Roles that the different users or groups of users perform
- Hierarchy of users and their relationships to your organisational units
- Flow of data within your organisation and the actions required upon it
- UI and form designs
- Data validation rules required
- Integration with existing databases for lookups and data validation
- Export integration for storing the data
- Reporting requirements for active processes



Statement of work (SOW)

The output from the requirements gathering stage is a fixed price quotation. The fixed price quotation allows you to budget for the entire project before commencement and includes:

- Written specification of your requirements
- Details of the implementation plan
- Transparent pricing itemising consultancy, training, licensing, and support requirement

All costs will be in accordance with our SFIA Rate Card and pricing document.

Build phase

Next, our technical team will use the findings from the requirements gathering phase to build your bespoke software. This means you get a solution that does exactly what you need and is not bloated with extra or confusing functionality you do not need. Plus, you get peace of mind that your mission-critical application is built on a solid, well-supported framework.

The new solution will replicate your existing process, including any improvements you wish to make.

For Process Director, ePC possesses over 15 years of experience in implementing solutions based on the platform. Our consultants combine extensive product knowledge with programming skills in C#.NET, JavaScript and Microsoft SQL to offer peace of mind about the technical aspects of development.

Project management

We can manage every aspect of the build phase, working with your project management team or entirely without impact on your internal resources. Although there are many aspects of the project that may require input from you, we will make sure you are prompted for information or actions to ensure any pre-defined timescales are met.

We will assign a Project Manager who will head a multi-disciplinary team and who will be responsible for the overall delivery of the project from delivery and implementation to training and ongoing support.

Externally accessible prototypes

As we build your solution, we are keen to present progress to key stakeholders as soon as possible to gather feedback crucial to the project.

This will be achieved during the development cycle as we will host an externally accessible prototype of your end solution. If areas of the solution exist that are potentially problematic or hard to define initially, we can use the prototype to ensure we are on the right track and fuel your internal discussions as to how certain parts need to work.

This feedback is often invaluable to the development as functional prototypes help gain end-user confidence in the solution.

Timescales

It is our normal practice to provide a fixed-price quotation for a project once we have a full understanding of your requirements. This would detail the number of days assigned to specification creation, development, testing, handover, and training.

Testing phase

We will conduct internal development and QA testing, including unit testing as part of our development processes.

Once development is complete, we will test the end-to-end process, making sure we cover the many possible variations of how the system could be used, and how these variations impact other variations. This ensures that the final solution will be delivered to the highest standards.

The next stage involves handing over the solution to your system champion.

Once the handover is complete, we expect a period of internal set-up and configuration of system variables e.g., user accounts. This will be followed by user acceptance testing (UAT) and system training with the intended audience in preparation for the live launch.

Enhancements and modifications

During this stage, we expect a small amount of fine-tuning before the development is completed with minor changes not incurring additional charges. In the unlikely event significant changes are required, we can provide a fixed price quotation and schedule the work for further system development.

For larger systems, the UAT environment can be used for training and demonstrating the system.

In fact, Process Director can be partitioned so that development and testing of new processes can happen alongside the live processes.

Test environments

At ePC, we understand you may require a separate non-production or user acceptance testing (UAT) environment to support your internal development and testing. To support this requirement, we can usually include discounted systems within a Statement of Work.

Live phase

Once the testing / UAT phase ends, we will deploy the end solution and provide help with documentation, support (hypercare in the first few weeks), and end-user training.

We offer cloud-based, on-premise, or hybrid deployment to fit your technology infrastructure with per-user, per-form or per-workflow pricing.

We also have private cloud options, where we host a dedicated system for your use only.

Our data centres are UK-based and fully compliant with UK GDPR. If you prefer, we can host your system within the Microsoft Azure global infrastructure, allowing you to keep your business-critical data in any region and comply with relevant legislation.

Our cloud-hosted option (with a 99.9% uptime guarantee) includes ongoing technical support and maintenance with system updates/enhancements automatically rolled out to users.

Although there may be some minor costs for re-deployment and cloud hosting cancellation policies must be respected, it is possible to migrate from any platform type to another if required.

Escrow

To provide peace of mind that you are protected, we can arrange for any source code to be stored in Escrow.

This includes the provision of a legal document stating the terms of the agreement, our commitments for maintaining the source code within Escrow and the release conditions. It also includes archival of the developed source code and filing with our Escrow partner.

Costs are available on request.



TRAINING



We have a variety of off-the-shelf training courses for Process Director ranging from end-user training to system administration.

With intuitive forms and a graphical interface, users should not need to know about the underlying Process Director platform. Often, user training is as much about understanding your business processes and methods as it is about understanding the technology.

We offer the following training for Process Director:

- Installation and Administration (Module 1)
- Building Forms (2)
- Creating Workflows (3)
- Creating Process Timeline Definitions (4)
- Knowledge Views & Reporting (5)
- Using Business Rules (6)
- Application Integration (7)
- Advanced Scripting & Customisations (8)

These courses are delivered ‘workshop style’ at your premises or remotely (if you prefer) and tailored to your requirements.

Typically, training is provided in the following format:

- One-day course 401: Quick Start Implementation. This course includes building Forms (2), creating Workflows (3) and Knowledge Views & Reporting (5)
- Two-day course 402: Full course – includes modules 1-7
- Bespoke course: As needed training for module 8

We are happy to train as many people as your premises can accommodate, usually up to six people. We can provide training documentation, software licenses and/or training laptops if required.

Separately, there are several online resources to support learning, including self-paced tutorials and monthly webinars.



As an IT support group, we offer our business colleagues choices. The decision to select Process Director/ Cloud Edition was made by the Divisional CFO, as the prototype of the CapEx process worked to his satisfaction. From an IT perspective, we were also genuinely pleased with the pilot.

Chris Broe, Group CIO
Rentokil Initial

SUPPORT AND MAINTENANCE



At ePC, we adopt the philosophy of being a real partner to your team when it comes to support and do not hide behind impersonal support forms or procedures.

You will have direct access to the delivery team at all times, including during the implementation, where you can liaise with a skilled and experienced support engineer by telephone, eMail, and online chat.

You will have access to our Platinum cover which allows ePC to remotely access and manage your system. This can be used for quicker fault diagnosis and resolution plus pro-active maintenance when required.

A technical support certificate will be issued listing the products covered by the support contract. As part of ePC’s SLA, all telephone calls, eMails, and call-back requests will be responded to within four working hours. In reality, requests for support are usually responded to within minutes of initial notification.

We will endeavour to supply either a fix or a workaround immediately. Many of our clients rely on our support and we always strive to exceed their clients’ expectations. We are proud to have never had a complaint against our support services.

Our standard support times are 09:00-17:30 GMT/BST during normal working days in England. We do not offer technical support at weekends or bank holidays.

Please refer to **Schedule 3 - Support SLA in the Terms and Conditions**.



We’re not being asked to deliver a 14-page change notice and have it signed-off by three people before we make an amendment to the system in six weeks. It is instant. It is one of the best features. I know that if an adaptation needs to be made or a change is required, the problem will be resolved within a few hours.

Robert Woods, Finance Manager,
Initial

AVAILABILITY



Uptime

The platform is accessible to users on a 24 x 7 x 365 basis with 99.95% uptime during each calendar month.

See **Schedule 4 - Availability SLA in the Terms and Conditions**.

Patch management

For most clients, we release fixes as needed. For small bugs, we can often patch and deploy on the same day. For more complex fixes, the timeframe is usually 2-3 days.

Acceptable use

See **Schedule 1 - Acceptable Use Policy in the Terms and Conditions**.

The acceptable use policy states you must not use our platform:

- (a) in any way that is unlawful, illegal, fraudulent, deceptive or harmful; or
- (b) in connection with any unlawful, illegal, fraudulent, deceptive or harmful purpose or activity.

Service constraints

No service constraints except those outlined in the Terms and Conditions.

HOSTING



Some of the features of our cloud infrastructure, hardware, and processes include:

Servers

We currently use Dell rack-mount servers utilizing redundant, hot-plug power supplies, cooling fans and solid-state hard disks. The servers have hardware remote monitoring, alerting and management.

Environment

We use an ISO27001-certified, Tier 3 data centre with award-winning green efficiency. Cooling is N+5 with full environment monitoring and automatic ionic, optical and beam fire detection and suppression systems.

Physical security

The data centre is protected by anti-ram security gates and four levels of proximity access security doors prior to entering the data floor itself. It is manned by security staff 24/7 with access being granted only after biometric registration. No one can physically access the servers without being escorted by security and only the few limited ePC staff that require access for day-to-day support operations have access.

Data security

All data is encrypted at rest and accessible only to ePC staff that require access for day-to-day management operations. Industry best practices, including strong password policies, secure VPNs, updated servers and infrastructure and staff training are followed.

Power supplies

Servers are supplied from two separate power circuits backed by both N+1 battery UPS and N+2 diesel generators.

Internet connectivity

Two separate dark-fibre lines with IP transit capability of 5Gbps to Internet backbones through both Telecity Meridian Gate and Telehouse North in the London Docklands with direct connections to over 20 data centres throughout Europe and the rest of the world.

Platform

Process Director itself is a Microsoft-stack based system, and we are currently running the latest versions of all core software (Windows Server 2022, SQL Server 2022, Process Director V6.01) which are updated regularly. Client data security is protected by way of TLS 1.2 and 1.3 only, using strong cyphers and Sectigo GlobalSign issued certificates, which currently gains us an A rating on the Qualys SSL tester.

Backup

The servers themselves are replicated to a second geographical location in near real-time. These replicated servers are capable of being promoted to live, should there be a need, either for extended scheduled maintenance at the primary site or in the event of a failure with the primary site. Periodic backups of servers are taken and retained for a period of no less than a year.

Maintenance plans

Maintenance releases will be managed by ePC. The cloud version will always be at the current major version number with updates and upgrades included within the subscription costs.

Most updates to the platform are deployed while the services are live, with minimal loss of performance for a few seconds. Monthly server updates in line with Microsoft recommendations are scheduled out of normal UK office hours and generally cause minimal interruption.

Upgrades and maintenance affecting the whole platform or system, although rare, would be scheduled in advance and would usually rely on promoting backup systems to live, to ensure the minimum interruption while the main servers are worked on.

DISASTER RECOVERY



Business continuity and disaster recovery

ePC maintains a business continuity and disaster recovery plan.

The purpose of this plan is to provide sufficient information to enable the Company to restore full operational status, as quickly as possible, following any business interruption, regardless of its scale or impact.

The primary objective in the event of an interruption is to restore the availability and integrity of core services to a level which is satisfactory to our clients.

As Process Director is deployed in a third-party data centre and remotely managed, you will see no interruption in your service in the event disaster recovery situation at ePC.

Incident management

ePC maintains an incident management procedure, providing a framework for reporting and managing security incidents, near misses and information security concerns.

The plan describes participants, incident categorisation, identification, containment, eradication, recovery, lessons learned, and communication plans.

Change management

ePC maintains a change management policy.

Changes to IT Infrastructure supporting contracted cloud hosted client systems shall be managed and executed according to a formal change control process.

The change control process will ensure that the proposed changes are reviewed, authorised, tested, implemented, and released in a controlled manner, and the status of each proposed change is monitored.



The technical implementation was very smooth. When we presented the prototype to the business, they asked for changes to the workflow but ePC have been very responsive throughout the project and made the changes quickly.

Robert Woods
Finance Manager
Initial

ONBOARDING AND OFFBOARDING



Onboarding

Organisation

Onboarding an organisation to Process Director can be achieved within a matter of weeks.

If feasible, it is our normal practice to provide a Statement of Work for any project. To do this, we would usually conduct a discovery phase which will require discussion of many areas, including:

- The processes you wish to automate
- The number of named or anonymous users involved in the process
- The roles that the different users or groups of users perform
- The hierarchy of users and their relationships to your organisational units
- The flow of data within your organisation and the actions required upon it
- UI and form designs
- Data validation rules required on forms
- Integration with existing databases for lookups and data validation
- Export integration for storing the data
- Reporting requirements for active processes

Once the discovery phase ends, we will create a Statement of Work outlining your requirements. It will include a fixed price and will document how much consultancy and training etc. (see 'Professional Services') is required to achieve your goals. All costs will be in accordance with our SFIA Rate Card and pricing document.

The above is a typical approach to a project but we are happy to accommodate your specific needs where possible.

Users

Upon completing the sign-up process, the customer will be able to access Process Director and create, amend or delete user accounts.

Offboarding

If you decide to stop using Process Director, we will provide a single copy of your data stored on the platform in a non-proprietary format such as a Microsoft SQL Server backup. We will provide the data with 30 days of the termination of the agreement.

Please note: your data will be provided in its raw form and may not be suitable for any particular purpose.

If requested, we can transform the data into another format (e.g. XML, CSV). Data exports will be charged in accordance with our SFIA ratecard.

ORDERING AND INVOICING



Ordering

Customers may order Process Director by completing and signing the Cloud Enrolment Form. By signing the form, the customer agrees to pay the set-up/license fees and adhere to terms and conditions outlined.

Furthermore, the customer agrees to pay for any professional services (consultancy/training etc.) outlined in the Statement of Work.

To proceed, we ask for a signed copy of the Cloud Enrolment Form in addition to a purchase order (or written confirmation) covering the work outlined in the Statement of Work. Upon receipt of the Cloud Enrolment Form and purchase order, we will commence work.

Invoicing

Unless otherwise agreement, payment is due immediately on receipt of invoice. Payment can be made by cheque or BACS.

Software and hardware supply

We ask for full payment before delivery.

Professional services

We ask for 50% of the total value with upon placing an order. If the completion of delivery is within eight weeks of the order date, the remaining balance is due upon completion of system delivery. If system delivery is not complete within eight weeks of the order date we require payment for completed work (whether delivered or not) at the end of each month.

Late payments

ePartner Consulting Ltd reserves the right to apply a 5% surcharge to late payments.

CONTRACT TERMINATION



Termination

Either party may terminate the agreement by giving to the other party at least 90 days' written notice of termination expiring both:

- after the end of the Minimum Term; and
- at the end of a Billing Period.

Termination as a consequence of failing to meet SLA

ePC shall ensure that the Process Director platform is available at least 99.95% of the time during each calendar month.

If we fail to meet the availability level, we will issue service credits. These service credits will be deducted by ePC from future Charges.

The service credits will equal 1% of the monthly charges for every full 1% of downtime below the guaranteed availability level. The maximum service credits available to the customer is 100% of the total charges payable during the relevant calendar month (exclusive of VAT and other taxes).

If the customer terminates the agreement while they have service credits, the customer will lose those service credits.

COMPANY OVERVIEW



About ePC

ePartner Consulting Ltd (abbreviated to ePC) support organisations to replace manual, paper-driven tasks with automated data capture, workflow automation, and document scanning solutions that reduce manual data entry and automate repetitive tasks.

Trusted by industry leaders

Whether processing up to 5 million 'pen and paper' IELTS tests each year for Civica/British Council or delivering an EDC system to help York Teaching Hospital detect colorectal cancer, our track record and expertise, combined with our strong solutions focus, means that the chances are, we've already come up with the solution to your needs for another client elsewhere. This enables us to reduce your costs and implementation risks – and means we know we can keep our promises.

Working with best-in-class vendors

We are certified resellers of BP Logix Process Director and ABBYY FlexiCapture as well as OpenText OEM partners specialising in TeleForm and LiquidOffice.

Not one size fits all!

At ePC, these commercial off-the-shelf (COTS) products are customised to your organisation's exact specification. This means you get a solution that does exactly what you need and is not bloated with extra or confusing functionality you do not need. Plus, you get peace of mind that your mission-critical software is built on a solid, well-supported framework.

A partner you can trust

When you work with us, we spend time with you to understand the problems you face before searching our toolbox to find – or create – the best process automation solutions to solve your unique challenges.

We focus on delivering enduring and scalable solutions and nurturing long-term relationships rather than simply selling boxed software. Our clients don't see us as a supplier. To them, we're one of the team.

We provide all services (consultancy, development, implementation, training, and technical support) from our Head Office in Lightwater (near London), UK.

About BP Logix

Founded by successful information technology industry executives, BP Logix has been building robust enterprise software solutions since 1995.

Their customers include the University of Pennsylvania, the National Institute for Mental Health, Multiplan, and numerous others around the world.

BP Logix and Process Director have earned dozens of industry awards for innovation and excellence. BP Logix is based in northern San Diego County, with additional sales offices in London and sales and distribution partners in Tokyo.

Process Director has been in continual development since the mid-2000s and is currently on version 6.01.

For more information, please visit <https://www.bplogix.com>.

BP Logix is part of Finrock Growth Partners, a software-focused private equity firm. Since 2009, Finrock has been investing in software businesses to help them achieve category leadership.

For further information, please visit <https://www.finrock-growth.com/investment-portfolio>.





**CYBER
ESSENTIALS**

Crown
Commercial
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Supplier

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