

Owner/s:	Commercial Contracts Manager			Issue Date:	29/02/2024
Classification:	Company Internal	Ref:	TSGM2	Issue No.:	2.0

TSG MOSAIC – Definition of Service

Definition of Service – TSG MOSAIC

TSG provides a robust and compliant Electronic Document and Record Management System solution in the form of Mosaic, built on the M365 platform, utilising SharePoint and complemented by TSG components to simplify / automate the classification, uploading, and searching of documents and provides enhanced security.

Key Features:

- Your data, in your tenant and under your control and ownership.
- Proven migration strategy and process.
- Best practice Information Architecture.
- Automatic filling.
- Automatic application of Governance and Compliance.
- Automatic application of Security
- Consistent User Interface in SharePoint and Office.
- Amazon search experience.
- Ability to enhance with additional Microsoft components such as Syntex and AI Builder.
- All the features and functionality of M365 including Power Automate, Data Loss Prevention, Subject Access Requests.

Migration of Documents:

A Migration plan will be developed and priced based on requirements. Implementation of the Migration plan is outside the scope of this Definition of Service and will be covered by a separate Statement of Work.

High Level Design: TSG MOSAIC

Design Review of data then presenting a basic writeup with proposed schema / control terms. The output from this will be a master list.

Delivery

- PM time and updates
- Control terms being built with the customer.
- Retention labels created and published; customer should be provided with training to make more as required.
- Test scripts to be provided for UAT which are specific to the infrastructure built by the consultant and customer.
- Environment will be built, including UAT environment.
- Super User Training is covered as part of the build along with the customer.
- Cleanse the system of test data ready for go live.
- Go Live

Features included:

Area	What	Detail(s) where need
Outlook Add-in	Submit Email to SharePoint library	Allows Submission of an Email which gets routed to share point
	Process Attachments to SharePoint library	Allows processing and submitting of email attachments to a SharePoint library
	All Attachments	Allows processing of all email attachments
	Individual Attachments	Allows processing of Individual email attachments
	Process a selection of attachments	Allows processing of a selection email attachments
	Search on Control Term	Allows use of a control term search to find an appropriate association of metadata
	Record search on Database Query	Allows the ability to search for a record (based on the control term) and assign it to the file
	Record search on SharePoint List	Allows the ability to search on a SharePoint list for the required metadata required for the file
	Record search on Folders	Allows the ability to search on a folder structure from a document library to set for metadata
	Edit Metadata Fields	Gives the user the ability to edit specific metadata fields based on the control term selected
Word Add-in	Upload Email with Filename specified by user	Give the user the ability to assign a Filename to the email selected for uploading
	Submit Word Document to SharePoint library	Allows Submission of a Word document which gets routed to SharePoint
	Search on Control Term	Allows use of a control term search to find an appropriate association of metadata
	Record search on Database Query	Allows the ability to search for a record (based on the control term) and assign it to the file

Definition of Service – TSG MOSAIC

	Record search on SharePoint List Record search on Folders Edit Metadata Fields	Allows the ability to search on a SharePoint list for the required metadata required for the file Allows the ability to search on a folder structure from a document library to set for metadata Gives the user the ability to edit specific metadata fields based on the control term selected
Excel Add-in	Submit Excel Document to SharePoint library Search on Control Term Record search on Database Query Record search on SharePoint List Record search on Folders Edit Metadata Fields	Allows Submission of an Excel document which gets routed to SharePoint Allows use of a control term search to find an appropriate association of metadata Allows the ability to search for a record (based on the control term) and assign it to the file Allows the ability to search on a SharePoint list for the required metadata required for the file Allows the ability to search on a folder structure from a document library to set for metadata Gives the user the ability to edit specific metadata fields based on the control term selected
Portal	Document Stores Create Update Search Document history Sort Filter View Document in SharePoint View Failed Document in Dead Letters View Document History Dead Letters Sort Filter Resubmit All or Selection Purge All or Selection Edit Single Administration View Cache Keys Flush Selected Key Flush All Keys	Viewable page in portal which shows current list of document stores which are used in SharePoint to route documents Allows the user the ability to create a document store Allows the user the ability to update a document store Allows the user the ability to search on a document store Viewable page in portal which shows current list of documents which have been routed via Mosaic Allows the user the ability to Sort the list of documents within the history Allows the user the ability to Filter the list of documents within the history Allows the user the ability to View the selected document within SharePoint Allows the user the ability to view the failed document within the Portal dead letters page Allows the user to view the current documents history Viewable page in portal which shows current list of failed documents, which can then be sorted, filtered, edited and then resubmitted Allows the user the ability to Sort the list of dead letter records Allows the user the ability to Filter the list of dead letter records Allows the user the ability to Resubmit All Records or a Selected, which will prompt resubmission of file Allows the user the ability to Purge All Records or a Selection, this will then not prompt any resubmission of the selection of documents. Allows the user the ability to edit the Metadata of a single dead letter Record Viewable page in portal which gives an Mosaic Administrator access to clear cached file routing records should a control term be updated. Allows the Administrator to view the current list of routed cached records Allows the Administrator the ability to flush the selected routing cache records Allows the Administrator the ability to flush all cached routing records
Document Uploader	Process Files to SharePoint library Single File Multiple Files Preview Of Multiple Files Search on Control Term Record search on Database Query Record search on SharePoint List Record search on Folders Edit Metadata Fields	Gives the user the ability to Process File(s) via SharePoint webpart to a document library with Metadata Allows Processing of a single file to a document library with Metadata Allows Processing of multiple files to a document library with Metadata Gives the user a preview of the multiple documents which has been selected Allows use of a control term search to find an appropriate association of metadata Allows the ability to search for a record (based on the control term) and assign it to the file Allows the ability to search on a SharePoint list for the required metadata required for the file Allows the ability to search on a folder structure from a document library to set for metadata Gives the user the ability to edit specific metadata fields based on the control term selected
Control Terms Manager	Create New Control Term / An Associated Document Library To route files via Metadata Provided by Database Query To route files via Extracting Metadata Form Recognizer To route files via the Metadata Provided	Gives the user the ability to create a new control term and document library.

Definition of Service – TSG MOSAIC

	To route files via Extracting Metadata from a SharePoint List To route files via Extracting Metadata from a Folder Name Assign Alias to Control Term	Gives the user the ability Assign an Alias to the Control Term
Refiler	Process Files to SharePoint Library Single File Multiple Files Preview Single File Preview Multiple Files Search on Control Term Record search on Database Query Record search on SharePoint List Record search on Folders Edit Metadata Fields Present link to File	Gives the user the ability to Process File(s) via SharePoint extension to a document library with Metadata Allows Processing of a single file to a document library with Metadata Allows Processing of multiple files to a document library with Metadata Gives the user a preview of a single document which has been selected Gives the user a preview of the multiple documents which has been selected Allows use of a control term search to find an appropriate association of metadata Allows the ability to search for a record (based on the control term) and assign it to the file Allows the ability to search on a SharePoint list for the required metadata required for the file Allows the ability to search on a folder structure from a document library to set for metadata Gives the user the ability to edit specific metadata fields based on the control term selected Prompts user after completion that the document has been submitted with a link to the document
File Download Extension	Search A File using Modern Search Selecting Single or Multiple Records Move Selection of Records to Webpart	Gives the user the ability to search through the current documents in SharePoint which they have access to and view those documents Gives the user the ability to Select one or multiple documents Gives the user the ability to Move a Selection of documents
File Download Webpart	Selecting Single or Multiple Files Download a Selection of File(s) as a Zip or Single.	Gives the user the ability to Select one or multiple files Gives the user the ability to Download a selection of Files either as a Zip or a Single document
File Synchronization Tool	Monitors folders on an on-premises server and uploads into Mosaic	Gives the ability to mass upload files into SharePoint via Mosaic
Mass File Ingestion from SharePoint	Monitors SharePoint Library and uploads into Mosaic	Gives the ability to mass upload files into a different SharePoint environment via Mosaic

Service includes:

Remote Assistance

Monday to Friday, excluding bank holidays, between the hours of 9am to 5:30pm

Connect 365

Online Portal available 24/7 to log incidents and access Knowledge Base

You can access the client portal to raise new support requests as well as monitor and update existing tickets. The portal is often the easiest method of contacting our team for assistance and is the primary route when reporting P2 – P3 priorities. You can also track incidents, log requests for change (items not included in this DoS) and access the Knowledge Base for self-serve issue resolution.

The Portal can be accessed via <https://Connect365.com> and you will be issued a login during support onboarding.

Security and Hot Fix Releases

Released as required.

Feature Releases

Dynamic feature releases to update and upgrade the software as they become available.

Proactive Monitoring

Automated proactive monitoring and fault logging for specific events, provided via the Ninja RMM agent. The Ninja agent must be running to receive this service. TSG is not responsible for proactive monitoring where the agent has been disabled. Pegasus Alerts automated proactive monitoring.

Prioritisation and Target Response times

Remote Support Priority Level	Response	Definition
P1	30 mins	- Full system failure - All employees (90%+) affected/unable to work.

Definition of Service – TSG MOSAIC

		• Mission critical services impacted. • All sites or critical sites impacted. • Potential reputational impact • Legal/regulatory/compliance impact risk.
P2	1 hour	• Service impaired/intermittent • More than 50% of users affected
P3	4 hours	• Service Impaired/Intermittent • Less than 50% of users affected

Proactive Services Software Review

We will provide recommendations for improvements to ensure your system is operating to its optimum level. This includes but is not limited to:

- Reviewing upcoming major releases of software*
 - Discussing the benefits of new features
 - Recommendations to take advantage of new features.
 - An assessment summary of existing features, including customisations impacted or deprecated by the update**
-
- System Health
Incident Management: We will respond to system failures/incidents.
 - Exception Management
We will review to system exceptions and determine their urgency. If not urgent, the fix may be added to a future Feature release. If urgent the fix to be added to a hot-fix patch and deployed accordingly.
 - Feature Releases
Details of timings and the content of these feature releases will be communicated, and customers invited to perform testing in their testing environments before being deployed into production.
 - Security patch release
If any security vulnerabilities are identified, they will be addressed, and patch releases will be made without notice. Updates detailing the changes will be made as the patch is released.
 - Hot-Fix patch release
Reported bugs will be reviewed and added to scheduled Feature Releases, however from time to time it may be necessary to release hot fixes at short notice (24 hours) to ensure continuity and quality of service.
 - Cost Management Review
A quarterly, pro-active cost review with the intent to reduce overall Azure spend by performing resource optimisation, identification of orphaned or un-used resources and getting an understanding of cost anomalies.

*Major software updates are as per Microsoft release cycle (where applicable).

**If changes to customisations are required to ensure continued functionality, then such changes would be deemed as chargeable and subject to quotation and lead times.

Platform Dependencies

Azure Deployment

The MOSAIC system requires two active App Registrations within customers Azure tenant to be assigned to TSG at all times:

- TSG MOSAIC Deployment requirement the following permissions:
 - RBAC: Contributor, Role Based Access Control Administrator (Preview)
 - AD: Privileged Role Administrator, Cloud Application Administrator
 - API Permissions (Application): Graph (Groups.Read.All)
 - API Permissions (Delegated): Graph(User.Read)
- TSG MOSAIC Authentication requirement the following permissions:
 - RBAC: None Required
 - AAD: None Required
 - API Permissions (Application): Graph (Groups.ReadWrite.All and Users.ReadWrite.All) and SharePoint (Sites.FullControl.All and User.ReadWrite.All)
 - API Permissions (Delegated): SharePoint (AllSites.FullControl)
- During deployment, TSG require a privileged account that has the Privileged Role Administrator and Cloud Application Administrator roles (or the Global Administrator role)
- TSG will deploy one resource group for each environment (such as testing or production).

Definition of Service – TSG MOSAIC

- o All changes made are to follow TSGs change management processes.
- o Customer will require (at a minimum) one Azure AD P2 license to allow for Privileged Identity Management

On-Premises Deployment

Only applicable if customer has a need to deploy the File Synchronization tool to upload files into Azure blob storage. The File-Synchronization Tool requires:

- A currently supported, Microsoft Windows Server operating system (excluding Windows Server 2012) to run on
- Privileged account with Local administrative rights for installation (and subsequently support)
- Ports 80/443 TCP open to customers Azure tenant
- A minimum of 500MB of disk space for installation
- A minimum of 500MB of OS disk space for the synchronisation database
- The File-Synchronization Tool will install a service which runs as local system.
- If files are to be processes from a network location, the File-Synchronization Tool service must be run as a domain account with the necessary permissions to access all locations.

On-premises Meta-Data

When applicable (customer has on-site Meta-Data), TSG will

- Deploy an Azure App Service Hybrid Connector. This connector requires:
 - o Port 443, and TLS 1.2 open to connect Azure and your On-Premises Meta-Data store

Portal

The Portal tool requires public API access to approved Microsoft networks to enable Office Add-in's to operate.

PLATFORM "Compatibility" requirements

SharePoint Application

All SharePoint applications require:

- A currently supported version of Microsoft Edge or Google Chrome

Office Add-ins

All Office Add ins require:

- Microsoft Office: 32/64 Bit Operating System, from version 2306 (any subsequent Build)

Portal

The Portal requires:

- A currently supported version of Microsoft Edge or Google Chrome

File Synchronization tool

The File Synchronization requires:

- A currently supported, Microsoft Windows Server operating system (excluding Windows Server 2012) to run on.

Customer responsibilities:

The Customer shall:

- make the Customer's Operating Environment and Customer-side Equipment, required to provide the Services, accessible to the Supplier's support staff, enable logons or passwords required for such support staff and provide appropriate hardware interface, software and access authorisation to enable remote diagnosis, should such capability be required;
- ensure it has suitable licences in place for any third-party software required (which is not issued by the Supplier) to allow the Supplier and its subcontractors full use in relation to the Services provided;
- not use the Services to receive, store or transmit material or data that is obscene, threatening, offensive, discriminatory, defamatory or in breach of confidence, infringes Intellectual Property Rights or other rights, gives rise to any cause of action against the Supplier in any jurisdiction or is otherwise unlawful;
- inform the Supplier of all health and safety rules and regulations and any other reasonable security requirements that apply at any of the Customer's premises;
- allow the Supplier or its designated subcontractors and third parties, global admin access to the Customer's relevant servers and networking systems for the duration of the Agreement;
- where a Microsoft Product service is deployed / utilised within the project the Supplier will be assigned to the cloud subscription/s as (as applicable) the Claiming Partner of Record (CPOR) and/or Digital Partner of Record (DPOR) and/or Transacting Partner of Record (TPOR) and/or Partner Admin Link (PAL) and Admin on Behalf of (AOBO) for a minimum of twelve (12) months from project completion date;
- in respect of any Microsoft funded services, sign and deliver the Microsoft Proof of Execution (POE) within 7 days of the date of issue by Microsoft. In the event that the Customer does not return the POE within the 7 days' notice period, the Supplier may be entitled to charge the Customer the amounts directly and the Customer shall follow the payment terms in this Agreement;

TSG MOSAIC to provide production platform support, TSG requires:

- Access to the privileged account used in the deployment steps:
- Accounts privileges to be modified, granting access to deployed resource groups, and the "SharePoint Site Administrator" role.

Definition of Service – TSG MOSAIC

- Access to the privileged account used to install The File-Synchronization tool.

provide appropriate hardware interface, software and access authorisation to enable remote diagnosis, should such capability be required;

provide all information and make available all resources as reasonably requested by Supplier in the execution of its obligations under this Agreement, and ensure that all such information and resources are accurate in all material respects;

use all reasonable efforts to follow the reasonable instructions of Supplier support personnel with respect to the resolution of defects;

gather all relevant information prior to requesting assistance in respect of any defects including detailed defect description, and procedures required to replicate a problem if possible. Any additional information which may help in the diagnosis of a defect should be included such as network configuration details; and

agree that if, in the course of performing the Services, it is reasonably necessary for the Supplier's performance of its obligations under a Statement of Work for Supplier to access or use any equipment, software or data of the Customer (or which is in the possession of the Customer) then it shall where it is able to do so grant to Supplier and any of its subcontractors a non-exclusive, royalty free, terminable licence to use the same solely for the purpose of delivering the Services only for as long as is strictly necessary to deliver such Services.

The Customer acknowledges that certain conditions outside of the Supplier's control may adversely impact the ability of the Supplier to perform functions of the Managed Services. Examples of such conditions are listed below:

- a) TSG MOSAIC failure of any Azure services used by or relied on by the "Provider Software".
- b) failure of Customer Hardware, software, or operating system.
- c) partial or full failure of Third-Party Services.
- d) network connectivity issues between Local System Components and the Supplier's platform; and
- e) network connectivity issues between Local System Components and its third party's servers.

TSG
Kingsway North
Team Valley
Gateshead
NE11 0JZ
Tel: 0333 220 0777
www.tsg.com

