

ADVANTIQ Discover

Service Definition

AI Email, Document and Records Processing
for Correspondence and Casework

Service summary

ADVANTIQ Discover processes inbound correspondence, documents and records inside the Buyer's own cloud tenant. It classifies and routes what arrives, extracts and summarises content, applies records and retention decisions, and passes work to staff for review. Each output carries an audit record of the rule, prompt version and model that produced it.

Organisations use Discover where inbound volume is high and handling is manual: correspondence teams, records and information governance, complaints, and casework operations.

Discover is deployed into one instance in the Buyer's cloud tenant. The Buyer provisions and operates the cloud resources and controls where its data sits. New uses are added as workflows on the same instance, reusing the adapters, governance and testing already in place, so a second or third use case reaches production in a fraction of the time the first one took.

Workflows are published as APIs. The Buyer's own applications can consume the structured outputs directly, and adapters connect complete end to end processes without further development.

Platform

Discover is built from reusable components. The components are combined into workflows, workflows are published as APIs, and adapters connect those APIs to the systems people already use. Everything runs inside one instance in the Buyer's cloud tenant.

The Discover platform

Reusable components. Workflow APIs. Connected systems.

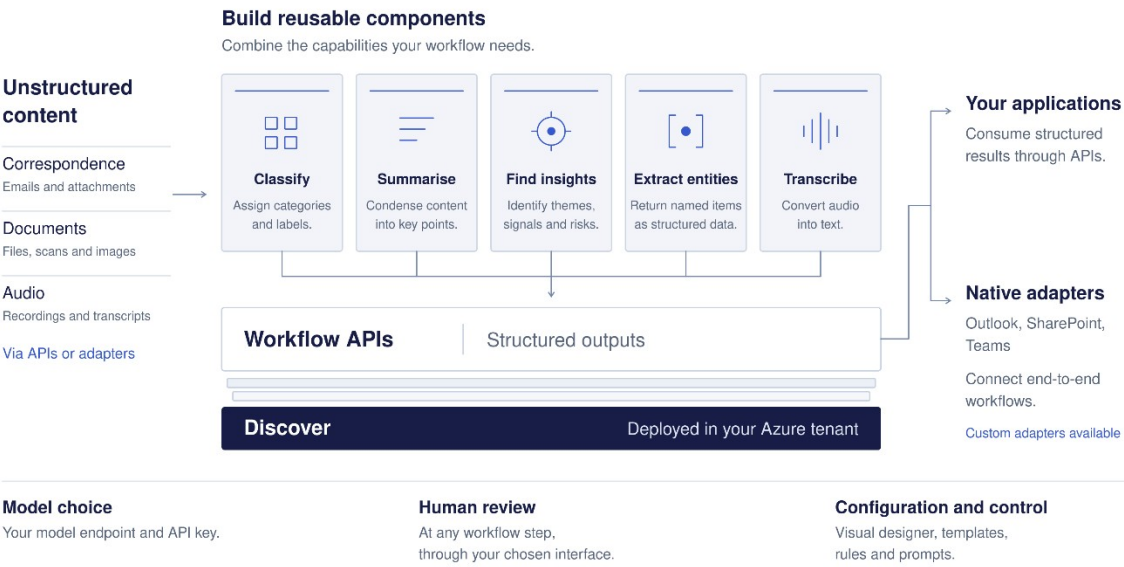


Figure 1. Components, workflow APIs and adapters within Discover.

Area	Detail
Components	Five reusable component types (classify, summarise, find insights, extract entities, transcribe) are combined into workflows and published as APIs. A visual workflow designer, templates, rules and prompts let the Buyer or its partner configure and publish workflows.
Content types	Emails and supported attachments, PDFs, Microsoft Office files, scanned documents, images, audio recordings, and call or meeting transcripts.
Deployment	Runs in the Buyer's cloud tenant, with a no-egress configuration available. Content and outputs do not leave the tenant.
Governance	Role-based access control, full audit logging, and version control across workflows, rules, prompts and models.
Accuracy	A testing suite measures accuracy, consistency and throughput, and compares models before and after a change. Regression tests run on release.
Explainability	Outputs are traceable to the rule, prompt version, model and configuration used. Where configured, the platform returns a plain English explanation of why a label or decision was reached.
Human review	Review points can be placed at any step in a workflow. The Buyer sets which outcomes are actioned automatically, which are held for confirmation, and the thresholds that apply.
Models	The Buyer chooses the model. Models can be compared, changed or replaced without rebuilding workflows. Discover is not tied to a single model vendor.
Cost	Optimised for small language models, with caching and prompt compression. On comparable correspondence workloads this has produced token costs around ten times lower than frontier large language models.
Time to value	Pre-built components, templates and standard adapters mean the first workflow is configured rather than built. A Pilot deployment is production-grade and is retained when it converts to a Licence, so nothing is rebuilt.
Volume	No caps are applied to the number of emails, documents or items processed. Licensing is by published workflow, not by volume.

Workflow patterns

A workflow defines what is done with the content. The example below shows a correspondence workflow assembled from standard adapters and platform components, with an optional human review step the Buyer configures to its own operating model.

Example configured correspondence workflow

From incoming email to classified content and structured metadata in SharePoint.

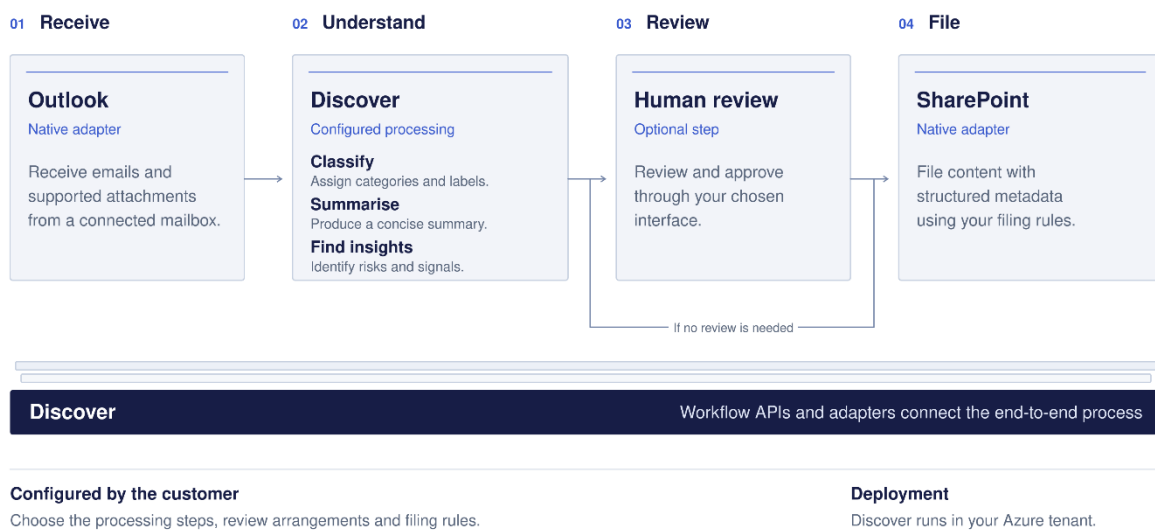


Figure 2. An illustrative customer-configured correspondence workflow.

Discover is not tied to a single use case. Patterns in use or available include:

- Correspondence triage, classification and routing
- Records determination, filing and retention
- Complaints intake, classification and summarisation
- Subject access requests and freedom of information handling
- Case setup and routing into case management systems
- Document classification, validation and summarisation
- Drafted responses and auto-response for human review
- Call and meeting summarisation
- Risk, sentiment and theme analysis across inbound volume

Additional patterns are configured on the same deployment under the same governance, audit and testing.

Service description

Content arrives from mailboxes, queues, forms or APIs through adapters. Discover processes it against the configured workflow and returns outputs to the Buyer's systems or to the review interface.

In scope:

- Email and mailbox intake, triage and routing
- Classification of correspondence, documents and records
- Records determination, filing to content systems and retention handling
- Structured data extraction such as names, dates, reference numbers and case fields
- Summarisation, key points and drafted responses
- Case setup and routing into case management systems
- Human review, quality checking and processing logs
- Administrative configuration of workflows, rules, prompts and access controls

Out of scope unless agreed at call-off:

- Custom adapters to systems beyond the standard adapters
- Data migration from legacy systems
- Custom development outside the standard service capability
- Buyer cloud resource management and platform availability management

Adapters

Discover connects to Buyer systems through adapters.

Class	Detail
Standard adapters	Included in the platform at no additional cost. These cover the Microsoft 365 estate, including Outlook, Teams and SharePoint. ADVANTIQ adds to the standard set from time to time; the current list is confirmed on application.
Custom adapters	Adapters to systems beyond the standard set, built and maintained by ADVANTIQ. Priced as Adapter packages in the Pricing document and agreed at call-off.

An adapter carries content to and from a Buyer system. It is not a workflow and does not affect the number of licensed workflows. ADVANTIQ maintains the standard adapters under the licence.

Workflows

A workflow is one published workflow in Discover. Licensing is based on the number of published workflows, as set out in the Pricing document.

Item	Position
Templates	ADVANTIQ provides configurable workflow templates for common patterns, maintained and updated under the licence.
Configuration	The Buyer, or a partner acting for the Buyer, may configure and publish workflows within the licensed entitlement. ADVANTIQ can investigate and build workflows for the Buyer under a Discovery package.
Ownership	The Buyer owns the workflow configuration, rules and prompts within its instance.
Support boundary	ADVANTIQ supports the platform, standard adapters and templates. Buyer-authored configuration within a workflow is supported by the Buyer.

Deployment prerequisites. The service is designed for deployment into a Buyer-managed cloud tenant, for example Microsoft Azure.

Prerequisites:

- A Buyer cloud tenant with permissions to deploy and operate the service
- Nominated Buyer technical contacts for environment access, identity and security coordination
- Network access for users and administrators consistent with Buyer security policies

Constraints:

- Custom adapters are not included unless agreed at call-off
- Service availability depends on Buyer-managed tenant resources. ADVANTIQ does not provide an availability commitment for Buyer infrastructure

Onboarding and training

Onboarding is delivered within the agreed package. A Discovery package investigates the use case, defines the target design and configures the agreed workflows. A Pilot deploys the platform in the Buyer's tenant and runs on the Buyer's own data. A Licence provides ongoing production use. A Pilot deployment is production-grade and converts to a Licence without rebuilding, so the work done to prove the service is the work that goes live.

Steps:

- Kick-off and confirmation of scope, stakeholders and success measures
- Tenant deployment and environment configuration
- Workflow configuration and accuracy testing for the agreed use cases
- Training for users, administrators and Buyer staff who will configure workflows
- Operational handover and agreed reporting cadence

The Buyer provides tenant access and approves deployment activities, provisions the cloud resources and manages their cost, provides nominated users for training and acceptance, and operates the tenant environment in line with its policies.

Support

Email support is provided 08:00 to 18:00 UK time, Monday to Friday, excluding UK public holidays. Extended cover and 24/7 Severity 1 cover are available as priced options set out in the Pricing document.

The Buyer is responsible for the underlying cloud resources and platform operations, including availability of cloud services, scaling, monitoring, networking and identity. ADVANTIQ support covers defects and issues attributable to ADVANTIQ-delivered components: application code, standard adapters, templates and ADVANTIQ-supplied configuration. Where an issue originates in Buyer infrastructure, ADVANTIQ provides best-efforts guidance to support diagnosis.

Severity	Description	Target response	Update cadence
1 Critical	Material defect in ADVANTIQ-delivered components causing core functionality to fail for most users, with no reasonable workaround	2 business hours	Same business day
2 High	Major defect significantly impairing use; a workaround may exist but is unsuitable at scale	4 business hours	Next business day
3 Standard	Non-critical defect, minor functional issue, configuration question or general support query	1 business day	Within 3 business days

These are response and update targets, not resolution guarantees. Requests may be reclassified where investigation shows the root cause is Buyer platform or infrastructure.

Service levels

Commitment	Position
Response	As set out above, within support hours.
Updates and patching	ADVANTIQ monitors application health. Security and maintenance updates for ADVANTIQ-delivered components are released under the licence and applied in agreement with the Buyer's change process.
Recovery	ADVANTIQ restores or redeploys ADVANTIQ-delivered components within the Buyer's tenant following a failure attributable to those components.
Availability	ADVANTIQ does not publish an availability commitment for Buyer-managed infrastructure. Availability targets for the deployed application can be agreed at call-off where the Buyer's tenant configuration supports them.

Security

Responsibility	Scope
ADVANTIQ	Secure by design engineering and code review, role-based access control within the application, application and audit logging, version control across workflows, prompts and models, and vulnerability management for ADVANTIQ-delivered components.
Buyer	Identity management including SSO, MFA and conditional access; network controls and firewall policies; security monitoring of tenant resources; key management and encryption configuration for tenant services.

ADVANTIQ holds Cyber Essentials and Cyber Essentials Plus. ADVANTIQ personnel are vetted to BPSS or equivalent, with higher clearance available on request. The service can be deployed with no egress from the Buyer's tenant.

Data protection

Processing takes place within the Buyer's tenant. The Buyer is the Data Controller and controls access to content and outputs. Correspondence, documents and derived outputs such as extracted fields, summaries and classifications remain within the Buyer's tenant. Access is controlled through Buyer identity and application roles. Retention and deletion follow Buyer policy.

Discover does not retain documents, emails or personally identifiable information. It retains workflow configurations, prompt templates, rule, prompt and model versions, and processing timestamps, status and error details. Content and structured outputs pass to the Buyer's systems.

Buyer data is not used to train models and is not retained by ADVANTIQ.

The Buyer supplies its own model endpoint and API key. Model processing location and data handling terms follow that choice, and the Buyer meets the cost of its selected model service.

Algorithmic transparency

ADVANTIQ provides the supplier information required for an Algorithmic Transparency Recording Standard record: tool and model specification, development data, and product-level risks and mitigations. The Buyer completes, approves and publishes the record. Model performance figures are drawn from the testing suite for the Buyer's own deployment.

Business continuity

Continuity for tenant resources is controlled by the Buyer's cloud configuration and policies. The Buyer is responsible for backups, restore processes and resilience configuration for the underlying tenant services. ADVANTIQ provides guidance on deployment patterns and restores ADVANTIQ-delivered components as set out under Service levels.

Accessibility

Where the service includes user interfaces, ADVANTIQ works to WCAG 2.1 AA and provides information on known limitations and mitigations.

Pricing

Prices are set out in the Pricing document. Four package types are available: Discovery, Pilot, Platform Licence and Adapters. The Platform Licence is tiered by the number of published workflows and by scope, from a single team through a single business unit to organisation-wide and group licences, with additional workflows priced at the rate of the Buyer's tier. Standard adapters are included. The Buyer meets its own cloud hosting costs and the cost of its selected model service.

Licences are granted to the contracting entity named in the Order Form, for the scope stated. Workflow counts and licence scope are confirmed at each anniversary. Where an organisation holds more than one licence, ADVANTIQ may consolidate them to the equivalent organisation-wide tier at renewal.

Ordering and renewal

Buyers order Discovery, Pilot, Platform Licence and Adapter packages through a G-Cloud call-off. Licences are an annual commitment invoiced monthly, or annually in advance. Where a

Buyer expects to add workflows or packages during the term, these can be included as priced options in the Order Form at award, so that expansion does not require a further procurement.

Licences renew annually unless either party gives written notice of non-renewal at least 60 days before the end of the current term. Renewal by written agreement can be confirmed at call-off.

Exit

On exit the Buyer retains and can export content and outputs held within its own tenant. Workflow configuration, rules and audit logs can be exported in open formats. ADVANTIQ provides assistance to confirm decommissioning steps for ADVANTIQ-delivered components within the Buyer's tenant.

Discover is configured rather than coded. Buyer staff are trained during onboarding to build, test and publish workflows, so the Buyer is not dependent on ADVANTIQ to extend the service.

Assumptions

- This service definition describes the standard service offering and is read alongside the G-Cloud listing and the Pricing document
- The Buyer is responsible for its tenant hosting costs and platform operations
- Custom adapters are excluded unless agreed at call-off