

Service Definition

Workflow Automation Solutions

Service Type

Lot 2b: Software as a Service (SaaS)

1. Service Overview

Workflow Automation Solutions is a cloud-based service that provides bespoke digital workflow systems to help organisations replace manual, paper-based or fragmented processes with secure online workflows.

The service is designed primarily for **health, education and public-sector organisations** that need to manage applications, approvals and internal processes efficiently while maintaining control, auditability and data security.

The service can be deployed as a **stand-alone solution** or **integrated with an existing website or online platform**.

2. What the Service Does

The service enables organisations to:

- Digitise application and approval processes
- Automate staged sign-off and decision workflows
- Manage schemes, procedures and internal processes online
- Reduce administrative burden and manual handling
- Improve oversight and consistency of decision-making

Workflows are configured to reflect each organisation's specific processes and approval structures.

3. Service Scope

Included

- Bespoke workflow configuration

- Online forms and process automation
- Automated staged approval and sign-off
- Client-branded visual design
- Secure web-based access
- Usage analytics and reporting
- Documentation and training

Excluded

- API access
- Connection to public sector networks
- Dedicated account management
- Long-term operational outsourcing

4. Deployment and Architecture

- **Cloud deployment models supported:**
 - Private cloud
 - Community cloud
 - Hybrid cloud
- **Multi-cloud support:** Yes
- **Data hosting location:** United Kingdom
- **Scalability:** Distributed cloud web servers are used for each client to manage peaks in demand.

5. Service Features and Benefits

Key Features

- Bespoke workflow solutions
- Automated process management
- Multi-stage approval and sign-off workflows
- Scheme and procedure management
- Client-branded user interface
- Stand-alone or website-integrated deployment

Key Benefits

- Automation of manual administrative processes
- Reduced management and administrative time
- Improved process consistency and oversight
- Reduced operational complexity

- Flexible integration with existing systems

6. User Access and Compatibility

- **Access method:** Web browser interface
- **Supported browsers:** Microsoft Edge, Chrome, Firefox, Safari, Opera
- **Installation required:** No
- **Mobile access:** Fully responsive design for mobile and tablet devices

7. Customisation

The service is configurable to allow user updates to:

- Content
- Imagery
- User permissions and access levels

Most customers choose to instruct the supplier to make changes on their behalf.

8. Onboarding, Training and Documentation

Onboarding

- Online and/or onsite training
- Web-based tutorials

Documentation

- Formats: PDF
- Training sessions are recorded and made available for later review

9. Support and Service Management

Support Channels

- Email
- Telephone support

Support Availability

- Phone support: Monday–Friday, 9am–5pm (UK time)
- Initial response: within 1 working day

Support Levels

Support requests are prioritised as follows:

- **Level 1:** Customer-impacting issues
- **Level 2:** Internal process issues
- **Level 3:** Change requests or enhancements

Support is provided equally to all clients; no dedicated account manager is assigned.

Support is available to authorised third parties.

10. Service Availability and Resilience

- **Guaranteed availability:** 95% (subject to availability of underlying hosting providers)
- **Service recovery:** In the event of complete service disruption, recovery will be attempted within 1 working day.
- **Outage reporting:** Email alerts
- **Resilience approach:** Available on request

11. Data Management

Data Ownership

All data remains the property of the client at all times.

Data Import and Export

- Import format: CSV
- Export format: CSV

End-of-Contract

- Service ceases at contract end
- All client data is returned
- Data collection is stopped

- Data is deleted on request

12. Security and Compliance

Data Protection

- Data encrypted at rest
- Data stored and processed in the UK
- Encryption applied to all physical media

Data in Transit

- Protected using SSL/TLS (legacy versions under 1.2)

Penetration Testing

- Conducted at least annually
- Performed by an external organisation

Incident Management

- Continuous monitoring
- Automated alerts for incidents
- Services reverted to a previous stable version in the event of an incident

Identity and Access

- User authentication required
- Username/password and Multi-Factor Authentication (MFA)
- Role-based access controls
- Access restrictions reviewed at least every 6 months

13. Governance and Assurance

- Board-level individual responsible for service security
- Software Security Code of Practice followed
- Security governance self-assessed against recognised standards
- Staff screened to BPSS level
- Secure development practices followed (self-assessed)

14. Offboarding and Data Sanitisation

- Equipment disposal handled by a third-party destruction service
- Data deletion available on request at contract end

15. Pricing and Trials

- Discount available for educational organisations
- No free trial offered