

RM1557.15 G-CLOUD 15

Service Definition

OneAdvanced's GP Document Workflow

OneAdvanced Limited

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1. Overview

GP Document Workflow (Docman 10X) is a document workflow system used by GP Practices to enable them to effectively manage inbound correspondence. Documents enter the system via electronic collection from Clinical Document Transfer (Docman Connect) or NHS Mail, or the user may scan or upload the documents manually. Documents are “filed” by users of the system to the patient’s record, which also transfers to the Clinical System record via a third-party API. The documents can also be work flowed around the GP practice so that appropriate action is taken with each piece of correspondence received.

2. Software Modules

The following modules are standard with GP Document Workflow

2.1. Functionality

Capture and Filing

- Scanning – Link Docman to the local scanner and upload documents.
- Capture – Drag and drop or click to upload documents from a local file.
- Filing – File documents into Docman and into the Clinical System
- Intellisense – OCR technology reads the letter and pulls out data to populate the required filing fields.
- Patient matching – When filing a document, Docman will attempt to match to the patient based on the content of the letter.
- Intellisense Templates - These templates are a great way to speed up the filing process; they allow you to choose keywords that, when found in the document you are filing, suggest document properties such as description and organisations for you – so you don’t have to enter them manually.
- Filing Templates - Filing templates can be used to populate document properties such as: description, organisation, care setting and folder. They can also be configured to determine what happens after filing.

Workflow

- Review Tasks - Document reviews can be created as part of the filing process so that documents can be sent for review by the most appropriate person or group of people. Documents can be sent on for review individually, they can be grouped together to create reviews for more than one document or templates can be applied to quickly apply the configuration of a review.

- Create a review from a template - Templates can be applied from the review options at the bottom of the filing screen. Each template that has been configured is shown within the review options list.
- Create reviews in a sequence - Document reviews can be configured to be sent in a sequence. The sequence can be defined as part of a template, when a review is created after filing, or when documents are grouped by adding them to the document clipboard.
- Review Task configuration - From the document review screen, priorities, due dates and completion options can be defined. They are managed through the settings option shown for each document review task.
- Task Templates – Configurable actions users can use to speed up creating new tasks from an existing task.
- Quick Steps – Configurable actions that perform more than one action in one click.

Clinical coding

- **Coding Tasks** - Specific tasks that include Clinical Coding features can be sent to recipients.

Clinical Code Term Browser - Users can search for Clinical Codes using the SNOMED Code Browser

Lasso - Users can use the mouse to highlight terms within the document and Docman will present suggestions for users to select from the SNOMED Browser

- Pre-defined Codes - Users can configure a list of commonly used Codes to present in a pre-defined list

Reporting

- Predefined reports - A set of predefined reports are available within the reports module. The reports are grouped into the following categories: Workflow and Tasks, Documents, System Configuration, User activity, My Reports
- Configurable Reports – Users can configure the predefined reports to their requirements and save for convenience.
- Charts - The charts contain a stacked horizontal bar chart that shows the active tasks per user or group depending on the configuration.
- Role based access restrictions - Access to the reports within the reports module are restricted by role.

Settings

- Users – Edit user details, configure user groups, manage RBAC, create custom roles.

- Sections - Create forms (e.g. Accident Log, Address book, Birth Register, Fridge Log), Configure Document and Patient Library and associated filing settings, update picking lists.
- Filing - Create and manage Filing Templates, Intellisense Templates, Filing Lists, Pre-defined Filing Codes, Document Folders, Annotations, Merge Templates.
- Tasks - Create and manage Workflow Templates, Taks Templates, Categories, Comments, Quick Steps and Views.
- Clinical Coding - Create and manage Pre-defined Clinical Codes, Units, Abbreviations.
- Reporting - Create and manage Task Charts
- My Profile – Manage user details, filing, task, Document viewer and search settings.
- Organisation Settings – Manage Integration Settings, Import users and patients. Manage filing, search, document viewer and system settings. Manage web links.

Integrations

- Docman can be integrated with Clinical Systems (EMIS and Vision) to allow documents and data to be filed to the patient record and for Docman to retrieve data such as patient and user details.
- Single Sign On with the Clinical System can be configured

2.2. Parameters

None

2.3. Excluded / Out of Scope

- Professional Services
- eLearning
- Integration with any system other than EMIS and Vision

3. Optional Modules

Customers may purchase the following optional modules for additional fees.

- Docman Share
- Centralised Processing
- GP Workflow Assistant (AI Modules)

4. Third Party Software

Applicable terms and conditions for Third-Party Products relating to a Software or Service are located: [here](#).

5. Pre-requisites

See: <https://help.docman.com/knowledge-base/warranted-environment-specification-wes/>

6. Service Platform

Hosted solutions or software as a service solutions are provided in accordance with the [Service Platform Overview](#).

7. Security

Hosted solutions or software as a service solutions are provided in accordance with the relevant technical and organisational [Security Measures](#).

8. Support

Support services are provided in accordance with the relevant [Support Terms and Conditions](#) for the Customer Care Package as contracted.

We understand and recognise the mission critical nature our products play in your organisation. We are dedicated to transforming the service delivery experience you receive from us that prioritises your long-term success, at every stage of your journey with us.

8.1. Customer Care Packages

To support your growth, we've created three customer care packages, each designed to give you the right tools and services for where you are on your journey.

Offering	Essentials	Enhanced	Elite
Multi-channel Technical Support	Support Portal	+ Phone	+ Phone

Offering	Essentials	Enhanced	Elite
Software Downloads, Updates, & Maintenance	✓	✓	✓
Case Management	✓	✓	✓
Support Portal, Knowledge base & Community	✓	✓	✓
Escalation Management	✓	✓	✓
Severity Level 1 Target Response Time	2 hours ¹	1 hour	30 mins
Severity Level 2 Target Response Time	4 hours	4 hours	4 hours
Severity Level 3 Target Response Time	8.5 hours	8.5 hours	8.5 hours
Severity Level 4 Target Response Time	25.5 hours	25.5 hours	25.5 hours
24/7 Customer Service Centre Access	✓	✓	✓
Case Support	Digital Engagement	+ Support Agents	+ Priority Routing

¹ for product specific variations, please refer to our [Customer Support Handbook](#), the response times stated are subject to sector specific variations e.g., Healthcare

Offering	Essentials	Enhanced	Elite
Case Reporting	Self-Serve Dashboard	+ Twice Yearly Reports	+ Technical Success Manager
Service Centre Users	3	5	10
Service Desk Hours Mon-Fri excluding Bank hols ²	09:00 - 17:00	09:00 – 17:30	08:00 – 18:00
In Product Support Tools Where Applicable	✓	✓	✓
FAQs	✓	✓	✓

² for product specific variations, please refer to our [Customer Support Handbook](#), the times stated are subject to sector specific variations e.g., Healthcare

9. Platform and Security

We power the world of work through our sector-focused software, bringing together mission critical **workflows** and a unified **user experience** that connect your organisation.

All underpinned by our **Delivery Platform** - offering scalability, security and connectedness by providing shared services such as cyber security, data analytics and AI innovation.

USER EXPERIENCE

A common user experience and persona-based analytics, reporting and dashboards means ease of adoption across your organisation.

WORKFLOW APPLICATIONS

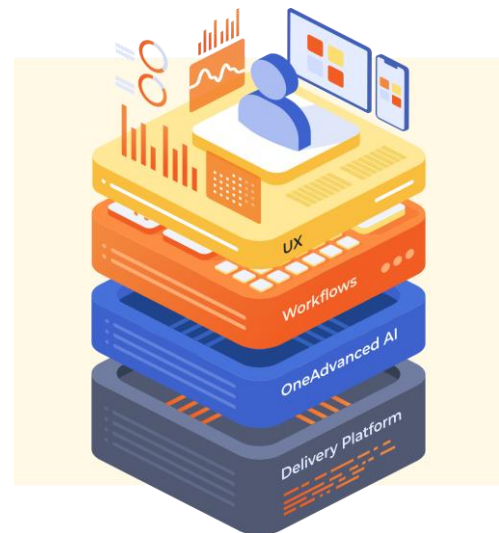
Connected, sector specific, workflows mean you'll have a smarter data driven user experience with user specific tools.

DELIVERY PLATFORM

Secure and scalable services for real connectedness. Cloud services for cyber security, user governance, API and integration management, a data layer and ethical AI and Machine Learning.

PLATFORM TECHNOLOGY – SYSTEMIC DELIVERY

Our platform is built for scalability, security and connectedness: with key components designed to enrich our Sector Portfolios. The platform embeds critical components, such as identity & access management, a common user-experience and API management into our Sector Portfolios with a systemic “build once, deploy many times” methodology.



SECURITY

System security by design with strict policy enforcement through automation.
Integrated & proactive threat monitoring and intelligence.



Fully encrypted end-to-end environment



Protect data at a **user, department or organisational level**



Customisable, including whether you want your chats remembered or not



Private Spaces enable you to share and collaborate around role, team or organisational data in a **private and secure environment**



Manage and control usage – seamless access across OneAdvanced Portfolios



Single sign on – providing security and convenience for the end user accessing all OneAdvanced solutions



OneAdvanced Platform controls usage

OneAdvanced meets the requirements for the following accreditations:

- **ISO 27001:** The international standard for information security.
- **Cyber essentials plus:** The highest level of certification offered under the Cyber Essentials scheme.
- **ISO 42001:** The international standard for establishing an Artificial Intelligence Management System (AIMS), providing a framework for organizations to develop, use, and maintain AI responsibly, addressing risks, ethics, transparency, and compliance.

SAFE. TRUSTED. SECURE

Our platform drives scalability, security, and seamless connectivity, serving as the foundation for our software. It unifies workflows across your organisation, ensuring the tasks you need are completed efficiently. Now enhanced with next-generation AI capabilities, it enables independent, adaptive problem-solving to tackle challenges with precision.

INTRODUCING THE ONEADVANCED TRUST CENTRE



At OneAdvanced we understand that trust isn't given; it's earned. That's why we're launching our Trust Centre, a centralised online resource designed to make it easier for

businesses to partner with us confidently. We've built this platform with your needs in mind, ensuring transparency, reliability, and clarity in every aspect of what we do. UK businesses are grappling with significant data and AI challenges. With 71% of organisations reporting data breaches and 63% targeted by cyber-attacks, the demand for stronger protection measures has never been more urgent. Furthermore, 60% of businesses now view AI as a high or critical risk, with data security standing as a key concern.

The Trust Centre is our solution to tackling these challenges head-on. Designed to provide a secure, transparent framework, it helps businesses effectively manage risks related to data and AI.

Our mission is clear: to Power Your World of Work. The Trust Centre marks a vital step forward in that journey - offering you fast, reliable access to the information you need to evaluate OneAdvanced with confidence.

WHY TRUST MATTERS MORE THAN EVER

Trust is a critical currency in today's fast-paced, digital-first business environment. From customers to partners, businesses expect their suppliers to demonstrate accountability and provide transparency on how they manage data, ensure compliance, and maintain robust security measures.

Achieving data protection and AI compliance can be a daunting task, requiring significant time, resources, and budget. In fact, nearly a quarter of UK businesses cite budget constraints as their biggest security hurdle. To address this challenge, we've made a substantial investment in cutting-edge tools, streamlined processes, and dedicated resources, so you can focus on what matters most – your business – without shouldering the burden of costly compliance alone.

With the launch of the OneAdvanced Trust Centre, we're delivering a comprehensive solution to address your questions, streamline information access, and ensure you stay informed with the latest updates.

A COMMITMENT TO EARNING YOUR TRUST EVERY DAY

At OneAdvanced we believe trust is not a one-time achievement but an ongoing responsibility. We'll be continuously updating the Trust Centre to include the latest certifications, evolving industry standards, and fresh resources, ensuring you're always equipped with the most relevant and accurate information.

Our goal is to empower your organisation to make informed decisions and innovate with confidence, knowing that OneAdvanced is a reliable partner committed to your success.

Please see OneAdvanced's [Trust Centre](#) for more details.

9.1. OneAdvanced AI



Introducing **OneAdvanced AI** - a private, secure AI service for role, organisation and sector specific work in UK organisations. OneAdvanced AI is designed to support customers who are looking to adopt AI but have privacy concerns and skill/knowledge limitations around AI.



UK hosted AI Service ensures that your data stays on UK soil, ensuring compliance with local regulations



Business-grade, **customisable, privacy controls** allow you to set permissions by user, function or organisational level



Secure AI for business. Built to give companies confidence in AI adoption without compromising security

Features include:

- UK-hosted, private, AI service
- Identity management controlled by the organisation
- Unified user experience (WCAG 2.2 AA compliant)
- Privacy controls set by user
- Secure personal environment for file upload and storage
- Reasoning AI to show logic process of conclusions, analysis and answers

We're redefining AI for business - **safely, securely**, and with real results.



Protect your data: Our UK-based hosting ensures that your data remains in the UK, under your control and in compliance with local regulations.



Work privately: Our private spaces allow you to upload files to a secure environment. Bringing the power of AI to your documents without compromising on security.



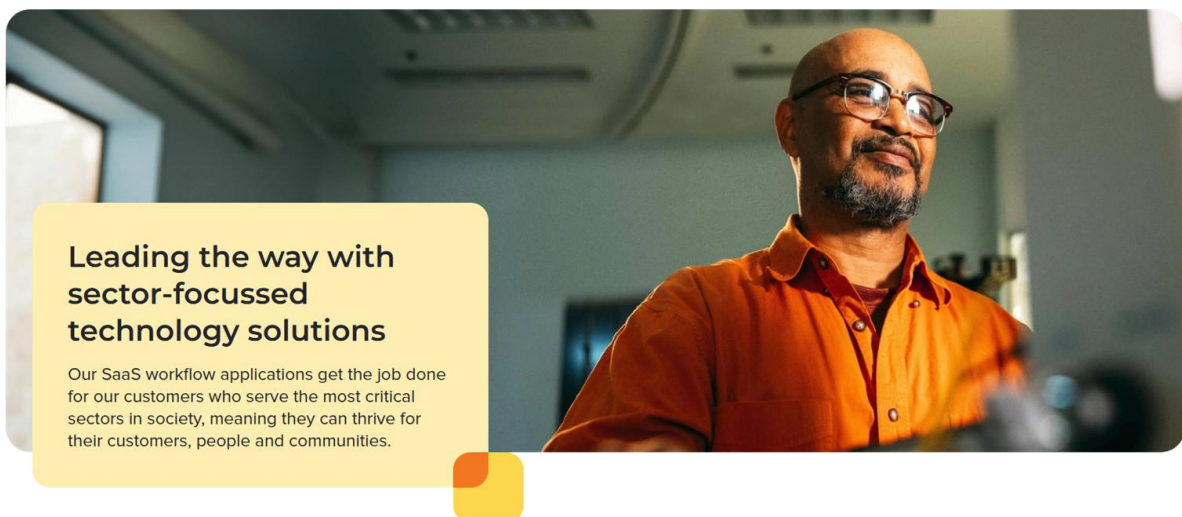
Enhance productivity: Our Retrieval-Augmented Generation technology combines data sources to enhance work, making it easier to complete tasks and achieve goals.

Explore how we uphold the principles of Responsible and Transparent AI [here](#).

10. Introducing OneAdvanced

OneAdvanced is the UK's third largest provider of business software and services with a £330m turnover, 10,000 customers and 1,800 employees. We provide enterprise and market-focused solutions that allow our customers to reimagine what is possible, innovate in their sectors and improve the lives of millions of people in the UK.

OneAdvanced solutions help to care for 65 million patients in the UK, send 10 million sports fans through the turnstiles, manage over £1 billion in charity donations, support 2.5 million students and get over 1.2 billion passengers to their destinations on time. By continually investing in our people, partnerships, and technologies, we provide right-first-time solutions that evolve with the changing needs of our customers and the markets they operate in.



We are more than just a software company. We **power the world of work** for our customers. Read more about us including information surrounding our culture and values [here](#).

ESG

Our Bettering Society ethos is at the heart of the way we do business. We are committed to leveraging our solutions to provide a brighter future for everyone, improving our societal impact and engagement. We achieve this across the four pillars of our ESG Strategy.

Our purpose is clear: to create a fairer, more inclusive society through the power of our people and our software by 2030. At the heart of this is our Bettering Society ethos - our guiding principle that shapes everything we do.

- **Better for the Planet** – by working with communities to reduce inequalities and empower more people to make climate-conscious choices.

- **Better for our People** – by breaking down barriers to career opportunities and creating pathways for meaningful, inclusive growth.
- **Better Technology** – by delivering solutions that drive positive outcomes for our customers, their people, and the wider communities they serve.
- **Better Business** – by upholding ethical, responsible, and compliant practices that reduce inequality and promote long-term trust.

Our ambition is to embed sustainability and integrity into every aspect of our business. We are investing in transformative technologies and strategic partnerships that accelerate our impact, while maintaining accountability through transparent reporting and meaningful stakeholder engagement.

Discover how OneAdvanced AI delivers trusted, UK-hosted AI solutions with a focus on sustainability, fairness, and accessibility through our [AI ESG Statement](#).

OneAdvanced has also made a commitment to transparency and accountability, publishing an annual Societal Report that outlines its progress towards its ESG goals. Please see [OneAdvanced 2024 Societal Report](#).

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Powering the world of work

Our business software is the trusted choice for critical sectors, including healthcare, legal services, and education. We keep the world of work moving.

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