



Source-to-Contract

Service Description Document

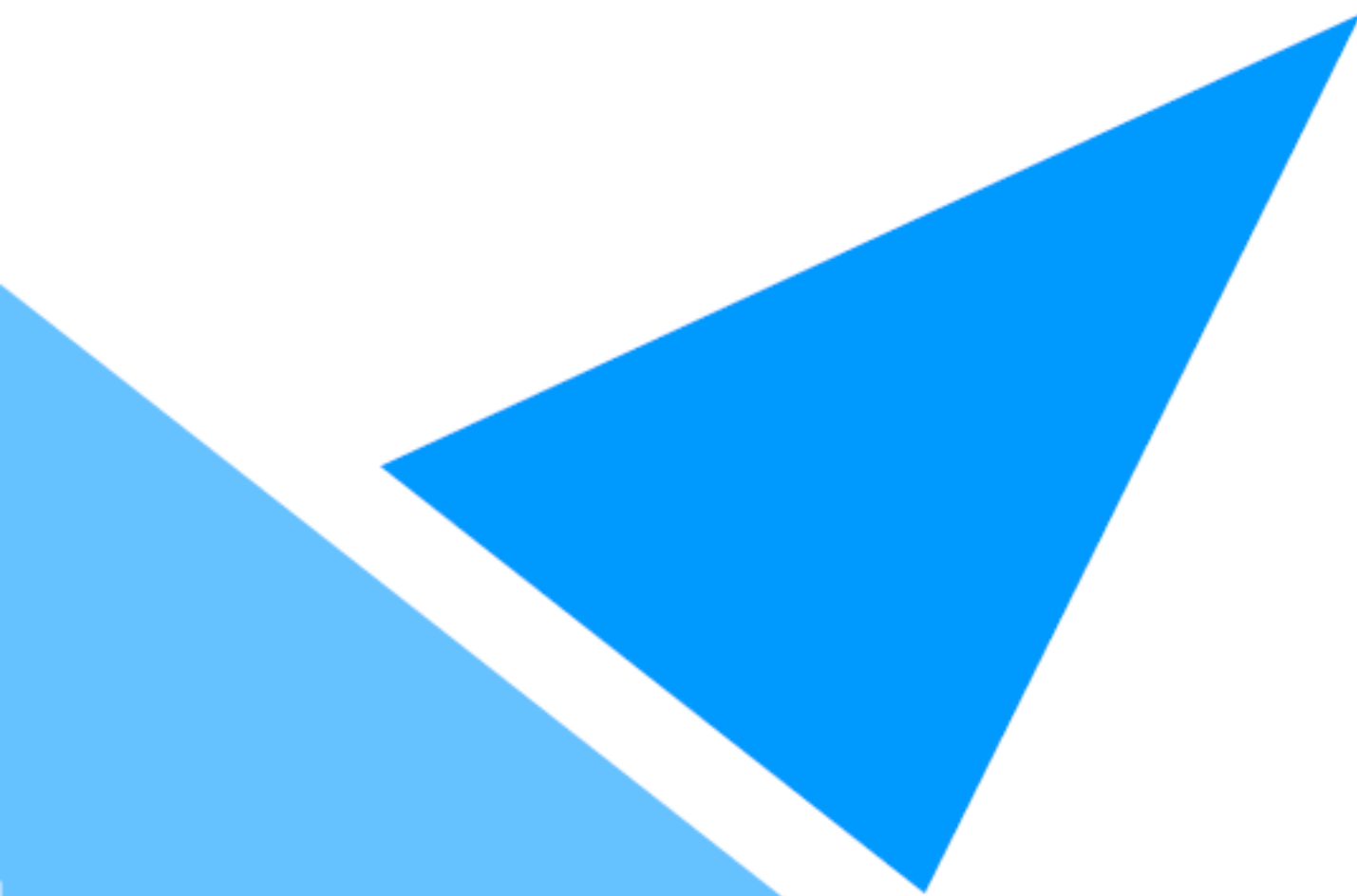


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About Atamis

Who are Atamis?

Atamis is a leading UK procurement solution provider, delivering software that generates value through insights, fosters intelligence through collaboration, and drives efficiency across the entire commercial lifecycle.

Atamis supports over 300 organisations, across both public and private sector, through its versatile software-as-a-service platform. By offering a modular suite of apps and integrations, the solution enables seamless data mobility and can be tailored to meet unique client requirements. Flexibility is evidenced by its diverse applications, providing eSourcing, contract and supplier due diligence for central government, local authorities, housing, utilities, financial services and more, as well as managing the full commercial lifecycle for some of the largest organisations in Europe, including the NHS, via the Department of Health and Social Care's (DHSC) end-to-end eCommercial system, which is deployed across the wider health service and its arm's length bodies.

Atamis' approach allows clients to select from a portfolio of Apps, Enhancers & Integrations to meet their unique needs and supports the democratisation of commercial data for greater visibility and better decision making across the whole organisation. Powered by Salesforce, Atamis boasts sophisticated reporting and dashboarding capabilities, meaning accurate, reliable, responsive and intuitive, information in the system is available to Procurement and Commercial teams, as well as being made available to the wider stakeholder groups.

Clients tell us that no other procurement system is as capable of meeting their nuanced requirements, but what sets Atamis apart above all else is the high level of support you'll get from a dedicated team of responsive, proactive and talented people who take pride in personally ensuring your procurement operation has maximum impact.

What is our vision?

Our vision is to be the leading force in driving procurement excellence by empowering its role as a strategic driver of commercial value, success and sustainability within an organisation. Our mission is to transform and optimise procurement, enhance its strategic value and achieve success by investing in the power of people, process and technology. Together, we will drive efficiency, growth and sustainable commercial value to our clients and the world around us.

Atamis was established in 2009 and quickly grew into a leading procurement software provider. The business' founder had a vision to find a nurturing and

permanent home for Atamis once he felt he had taken its growth as far as he could and decided to transfer ownership of the company over to Banyan Software UK Ltd in October 2021. Banyan Software pride themselves in continuing the legacy of a company's culture, product and teams that have been built over many years. Banyan's support has enabled Atamis to continue its rapid growth trajectory not only in terms of recruitment but also in the strategic development of our product. This support will remain steadfast as the growth journey pushes forward.

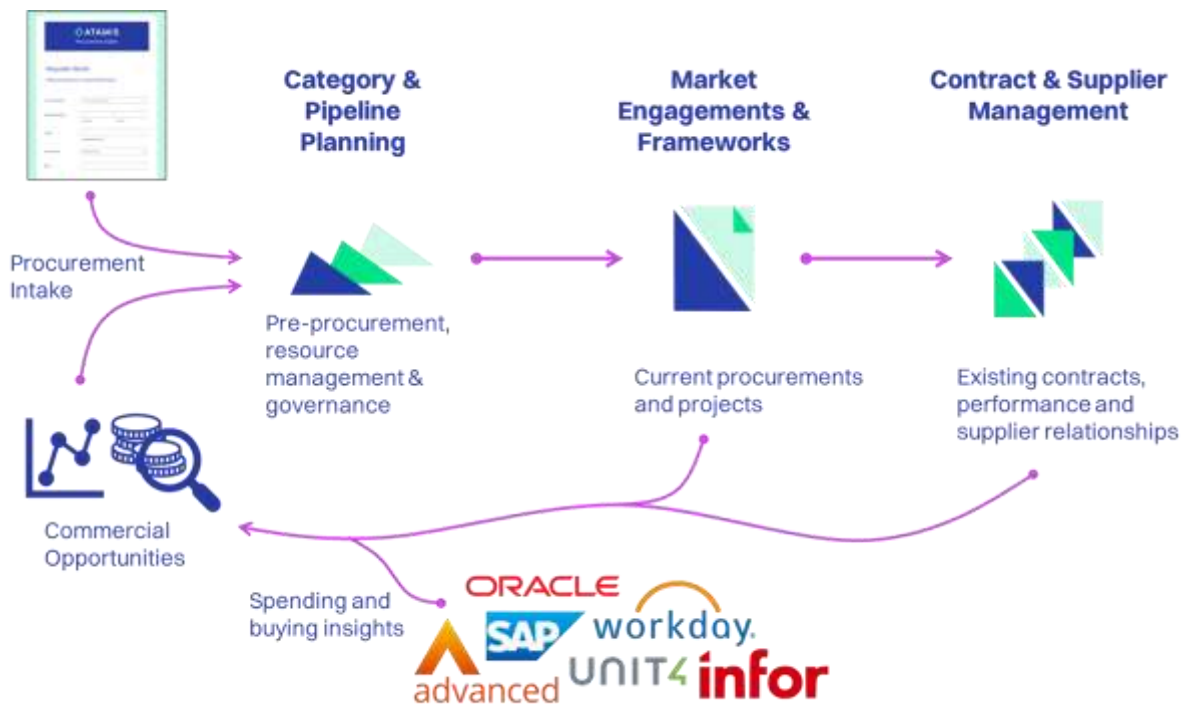
How does our vision support your organisation?

At Atamis, we believe in procurement with purpose. We invest in people, process and technology, combining these elements to achieve greater outcomes. This is why clients and colleagues feel that they will never be just a number to us and why nine out of ten Atamis clients renew each year. Atamis' ultimate purpose is to save people time and money through providing responsive procurement solutions. Our greatest satisfaction comes from enabling our clients to maximise value from their procurement activity and elevate their strategic contributions within their organisations, so that procurement functions have the greatest possible impact.

Our Solutions

Technology to Support Your Procurement Processes

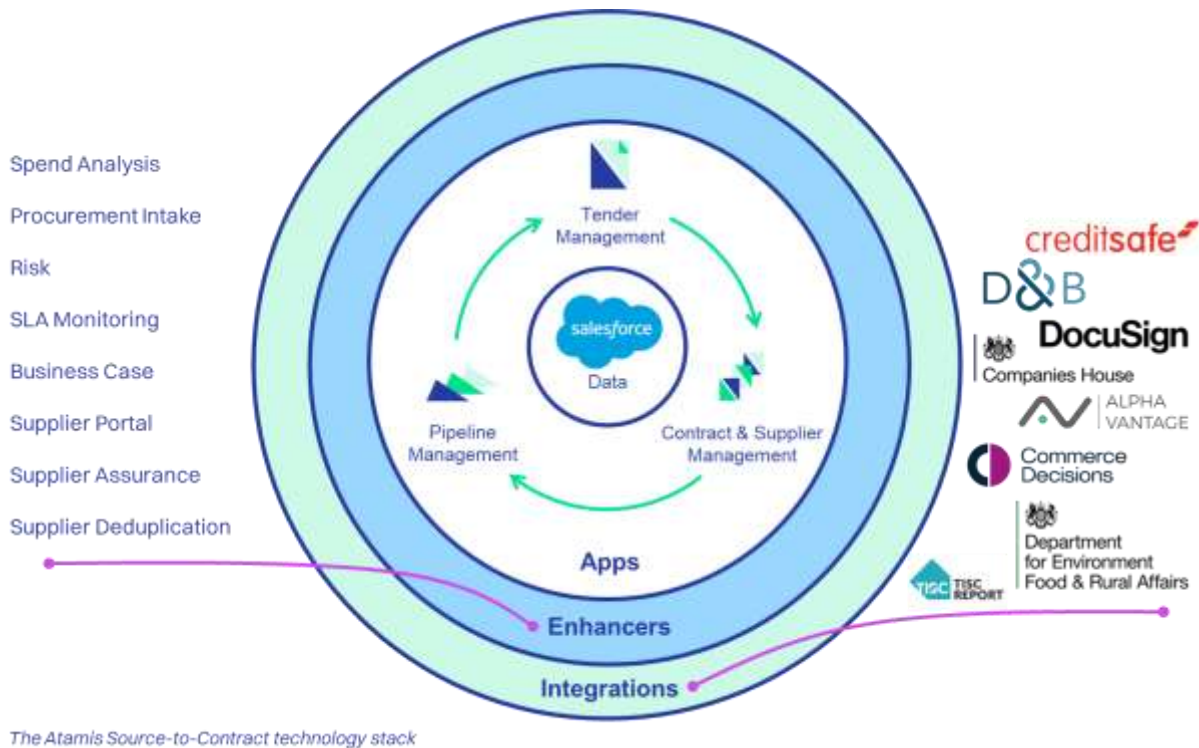
Atamis' Source-to-Contract suite provides organisations with a strategic toolkit that helps proactive Procurement departments to streamline procurement intake, spend analysis, pipeline planning, supplier relationships, tendering and sourcing, and contract management, within a single solution that caters for the full commercial lifecycle.



The Atamis Commercial Lifecycle

Built as a cloud-native SaaS solution, Atamis takes advantage of the innovative Salesforce Platform, meaning the applications are scalable, secure, reliable, and flexible enough to cater for organisations of all sizes, and able to be deployed in a variety of configurations to suit both your current 'as-is' and future 'to-be' processes.

Built around a common database, Atamis enables organisations to retrieve, review and edit information from anywhere within the solution, using contextual dashboards to place key information at users' fingertips and comprehensive management information reports that can be shared and exported for use in external documents and applications.



Overlaid on top of the applications are a suite of Enhancers and Integrations that enable organisations to select the components most suitable for their immediate needs, while ensuring that the system can grow with them, as they evolve and develop new processes within Procurement and across their wider organisation.

Atamis Apps

Pipeline

Atamis Pipeline is a strategic application that ensures complete control and visibility of your Procurement pipeline and pre-procurement activities. Many organisations will manage pipelines through a series of spreadsheets, emails and other documents stored across various locations. This makes pipeline monitoring and analysis particularly difficult for management when scheduling resource, planning budgets, setting targets and measuring success. Furthermore, processes employed across the organisation are inconsistent with each other, which can cause additional challenges when trying to measure, compare and benchmark within the system.

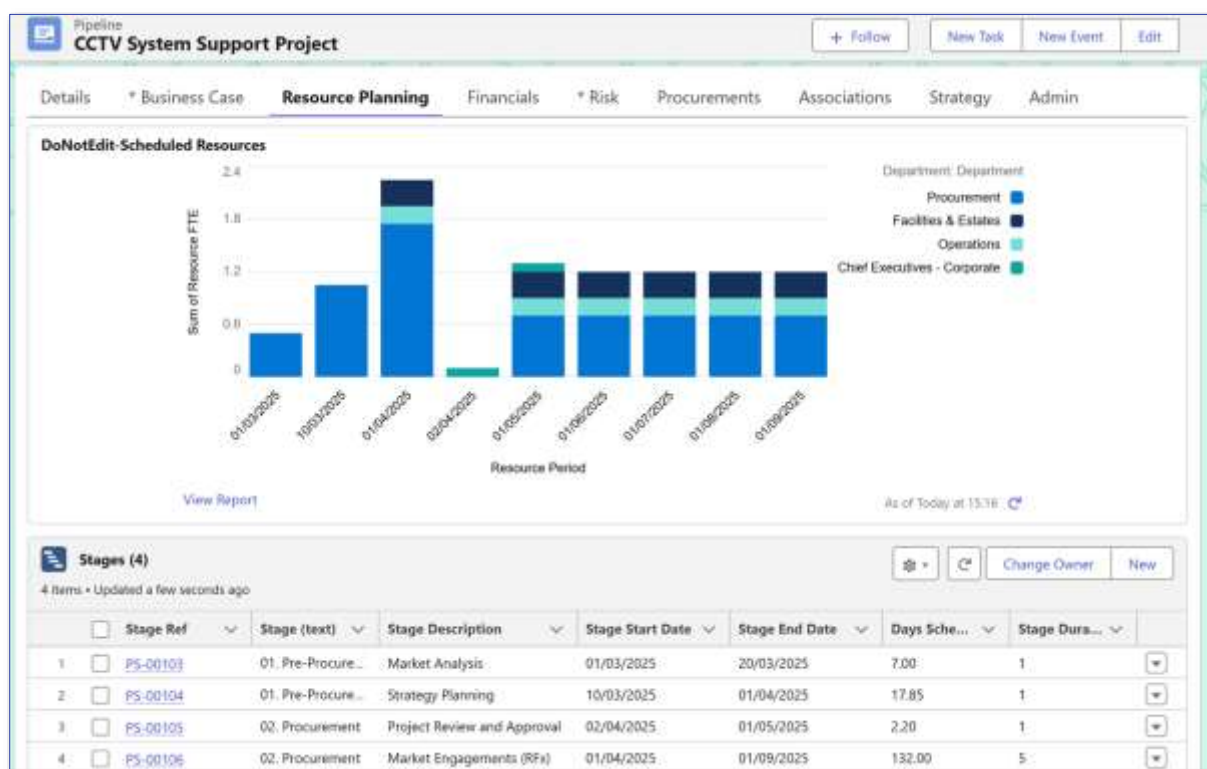
Bringing all Procurement pipeline activity into Atamis will provide top-down views across all stages, sourcing projects and contracts, with strategic Procurement teams able to monitor current and future projects and their key aspects, such as;

-  Procurement activity cross-category, cross-service area etc.
-  Personnel and resource requirements at each stage.

- Budgets and spend, broken across the duration of the pipeline.
- Savings and benefits targets, alongside actual savings achieved.
- Creating and approving of business cases and supporting justification.
- Risk registers, issue logs, discussion threads, attachments, and calendars.
- Approval workflows, audit trails and much more.

Managing all related pipeline information together within Atamis Pipeline will allow project teams to better plan their market engagement activities including collection of demands from across the organisation, conducting market analysis, reviewing previous pipeline projects for lessons learned, collaborating with stakeholders to define their requirements and the types of questions that need to be asked of bidders as well as the actual tendering and post-award activity itself.

Notifications and automation within the solution ensure that tasks are kept on-track or highlighted when running behind, contract expiry and renewal dates are never missed, and adequate time is allocated for the planning of resources to conduct re-negotiation or re-procurement and that information from existing contracts can be fed automatically into the projects being created to renew or replace them.



Example pipeline showing stages, resource requirements and stakeholder activity.

With Atamis' commitment to UK Public Sector Procurement, organisations will be able to use Atamis to publish their procurement pipeline notices to the Cabinet Office, as part of the Transforming Public Procurement regulations.

Tender

Atamis Tender provides a flexible and intuitive eSourcing solution catering for everything from simple price only Request for Quotation (RFQ) through to strategic multi-stage sourcing projects and frameworks and everything in-between. Atamis comes deployed with a series of Public Sector compliant procedures and templates, which can be used out-of-the-box. Where necessary, Procurement teams can modify these templates and create entirely new processes within Atamis to suit their specific needs and future requirements.



Sourcing Console provides a clear interface from which to monitor progress and perform actions.

Sourcing Workflows and Approvals

With structured workflows, milestones and gateway approvals, Atamis Tender will guide Procurement professionals, and service area users alike, through the necessary steps of a project. With the workflows being defined and managed up-front by Procurement, organisations will be confident that all market engagement activity adheres to the necessary legislation as well as any internal Procurement policies. Users can clearly see the pipeline of upcoming activity and will be prompted as to which steps require action from them, with clear guidance available for each step.

As milestones approach, the system can be used to inform buyers and suppliers, letting them know of status updates, required actions and ensuring tenders are published and opened on time, in order to meet the project timeframes. Automation in the system will ensure that submissions are validated and complete and that clarification and response deadlines are honoured, with bidders able to see timestamps and the status of their responses.

The automatic validation within the workflows will ensure that users cannot inadvertently act in a non-compliant manner, and the comprehensive audit trail will keep a record of all activity, in case information is needed to resolve any disputes.

Public Procurement Notices

Depending on the procurement procedure being followed, the system will prompt buyers to publish the required procurement notices, in line with the respective Public Sector regulations being followed. Notices are prepared and saved within Atamis, with the functionality closely mirroring that of the portal itself. This means that the users do not need to exit the system to post a notice and where appropriate, notices can be sent via internal approval workflows and automated validations prior to being made public.

In addition to the notices being published to the public procurement portals, contracting authorities can advertise the opportunities on their own supplier portal, allowing prospective bidders to browse open opportunities that might be relevant to them and express their interest to participate.

Requirements and Questionnaires

Various project stakeholders can be involved in gathering requirements from across the organisation and compiling them into structured questionnaires, broken into sections that can represent the different requirement groupings and envelopes, for example Commercial, Technical and Social Value sections. Each section can be weighted accordingly, with each question inside the section also able to carry its own weighting within that section. Similarly, each section can be assigned to individuals or groups for evaluation, allowing subject matter experts to provide their scores only to their relevant sections and removing the risk of any bias in the scoring and evaluation process.

Bidder responses can come in the form of free text, drop down selections, dates, attachments, currency values etc. which helps to ensure a structured response and aides scoring and auto-scoring. Common questions such as company details, Standard Questionnaire and Social Value/ESG, can be saved to a library and re-used across numerous tenders, ensuring speed, accuracy and consistency when setting up new projects.

Documents and attachments can be added to the tender and shared with bidders or kept buyer-side only. This functionality allows for a complete tender pack to be issued via the Supplier Portal, with tracking to identify which suppliers have downloaded which attachments.

Notifications and Clarification Messages

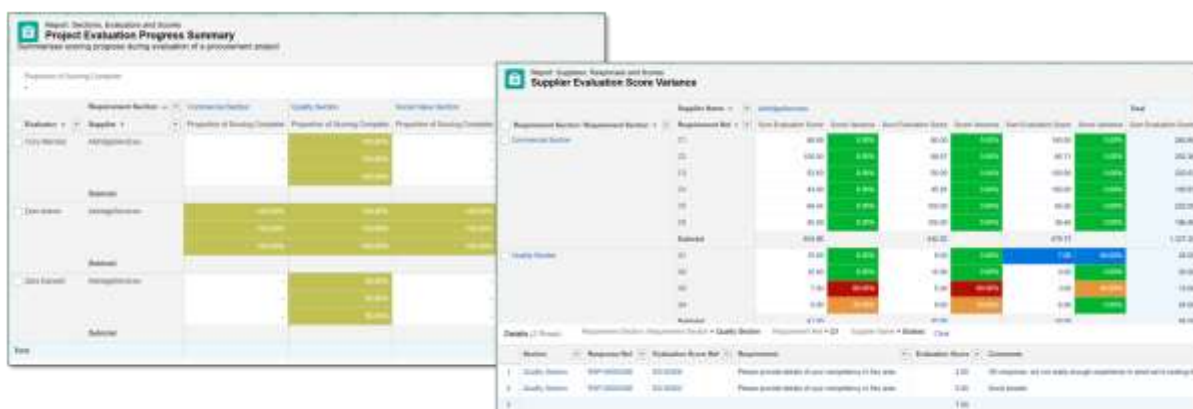
Message Centre provides an online, audited dialogue channel between bidders and buyers, allowing bidder questions to be submitted and compiled, with buyer clarification answers able to be broadcast to all bidders. Messages can contain attachments and will also provide read receipts back to the sender.

Built-in collaboration tools such as Chatter, Tasks and Calendars can be used to liaise with project team members and the wider organisation – with the ability to integrate into Microsoft and other team productivity tools also available.

Online Evaluation

Once the bidder response deadline passes and tender boxes are opened the solution will prepare the bids for online evaluation between individuals or teams of evaluators. Evaluators will be notified automatically and granted access only to the assigned sections of the response, with Procurement teams and project managers able to monitor all evaluator progress via a dashboard.

Auto-scoring, commentary and moderation functionality helps to ensure evaluations are fair and unbiased, with a full audit trail documenting any changes to scores during moderation. Moderation panels can be conducted, using the system to display all evaluators scores and comments within a single view.



Dashboards and reports during evaluation help monitor progress during large or complex projects

Atamis supports three different evaluation algorithms, which will automatically rank bidder responses and provide suggested award decisions following scoring and any moderation. The supported algorithms are;

-  Weighted Averages
-  Weighted Scores
-  Weighted Percentages

Weightings can be advertised to bidders while they are compiling their response and the various algorithms provide flexibility when sourcing different types of goods and services. Using Atamis, organisations will be able to evaluate bids accurately and fairly, while providing evidence and justification for a particular award decision that considers price as well as quality and other aspects such as social value, delivery and competence.

Contract Negotiation and Award

Once evaluated, Atamis Tender will be able to guide the users through the process of contract negotiations, award proposals, award notices and bidder feedback, before taking the information gathered during the tender process and using it to create and populate a new contract record automatically.

Contract and Supplier Management

Atamis Contract and Supplier lets Procurement departments define the processes and procedures that need to be employed across the organisation when it comes to contract lifecycle management, and the overarching supplier relationship management activity.

By building Procurement procedures into the system, day-to-day contract management activity can be devolved out to the stakeholders within the service areas. This means that the stakeholders responsible for the contracts can play a more active role in regular contract reviews, Key Performance Indicator (KPI) and Service Level Agreement (SLA) management and eventual re-procurement or re-negotiation of goods and services, while having all the information about the contract and supplier in a single place.

With information from across the organisation being captured centrally, Procurement teams will have instant access to important dates, contract values and consumption, key contacts and any other related documentation. This allows them to build a picture of contract health across all departments and categories, using standard reports and dashboards as well as creating their own custom visuals to answer questions, support decision making and plan future initiatives and projects.



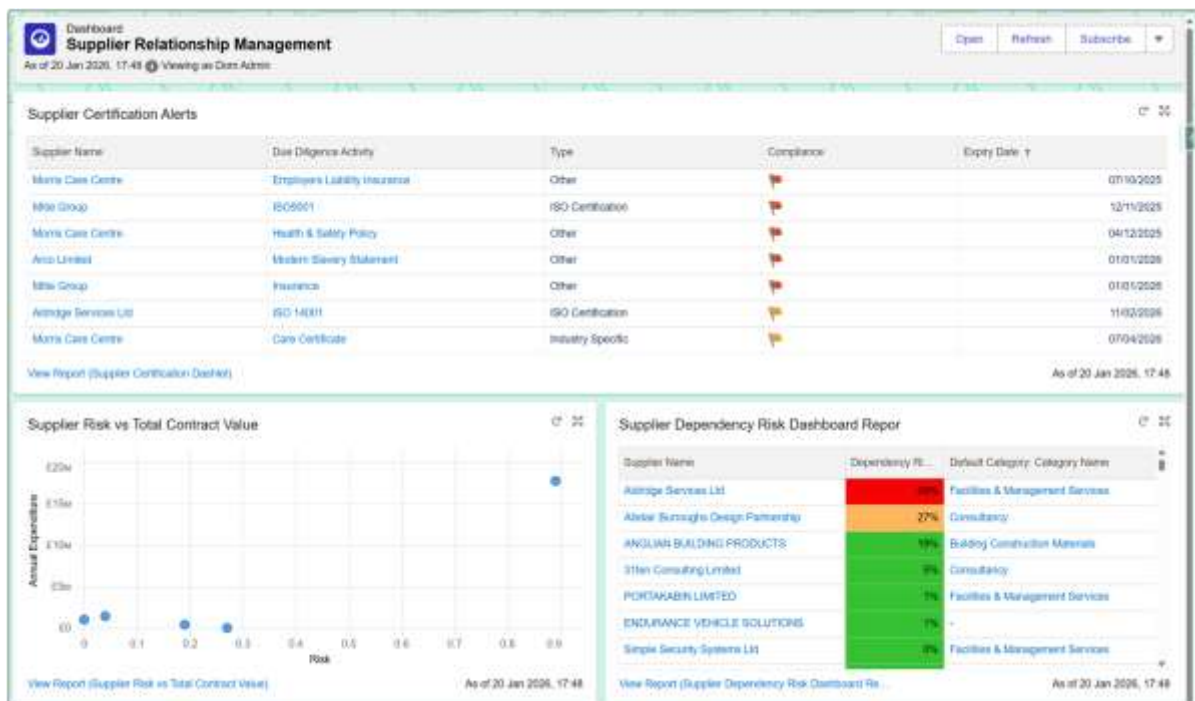
Homepage dashboards provide a view of what is important to each user.

Atamis Contract and Supplier will be able to issue notifications to stakeholders and suppliers, alerting them to upcoming contract management requirements such as regular performance reviews and KPI submissions, contractual commitments, the

delivery against those commitments and early warnings for under-performing contracts, high risk contracts and contracts that are approaching their expiry dates and notice periods. All this information held together helps to ensure that organisations do not find themselves in a position where high risk or under-performing contracts are automatically renewed due to missed deadlines, which has the potential to lock organisations into expensive contracts on unfavourable terms.

In addition to the day-to-day management of the contract, it is important to ensure that the supplier relationship is nurtured and managed appropriately, to ensure compliance and remove or reduce risk wherever possible. Atamis Contract and Supplier will provide the tools to keep track of a supplier's profile within the organisation, giving Procurement teams real time visibility of current exposure to a supplier, such as where a supplier is fulfilling a contract, any frameworks they may be part of or any sourcing activities they are participating in.

Recurring due diligence tasks can be scheduled into the system, prompting stakeholders to collect and manage information such as policy adherence, insurances, accreditations and certifications and all other information that is important to the safe and successful delivery of the contracts. The information being collected from each supplier can be tailored to suit the segment, category, region or risk profile that the supplier represents to the organisation and the solution is flexible enough to grow as different departments and categories adopt new and improved processes over time.



Supplier relationship activities that are approaching or overdue are highlighted to the responsible users.

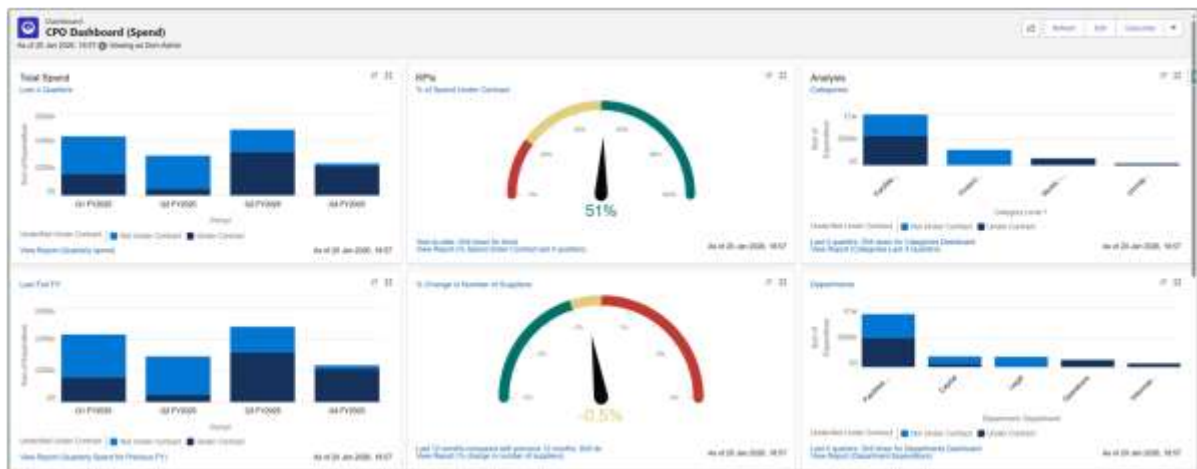
Supplier performance and compliance can be captured and managed at supplier level and at individual contract level, providing early warnings if performance levels start to decline, and giving plenty of opportunity to address.

Integrations with third-party information providers such as Dun & Bradstreet and Companies House mean that supplier profiles can be enriched automatically and regularly with up-to-date risk information, offering a holistic view of the supplier's financial and operational health and giving Procurement and Commissioning teams access to multiple sources of information, from within a single solution.

Atamis Enhancers

Spend Analysis

Use Atamis Spend Analysis to visualise where money is being spent within the organisation and quickly identify opportunities to reduce cost and variance, increase compliance and reduce risk. Taking a feed from the Accounts Payable system, Atamis Spend Analysis will be able to automatically categorise spend, linking it to the respective suppliers, contracts, departments, cost centres and categories and presenting the information through a variety of intuitive dashboards and reports.



Spend Analysis helps management track performance against Commercial initiatives

With Atamis Spend Analysis, Procurement teams and the wider stakeholder groups will be able to see contract consumption across the organisation, as well as quickly identify where spend is happening off-contract and other non-compliant practices, and take steps to reduce cost variances across the organisation, reduce risk by moving spend to lower risk suppliers or re-negotiating high risk contracts, negotiate better terms with suppliers by offering to consolidate more of the spend with them and set and measure strategic objectives such as innovation and carbon expenditure reduction across categories and suppliers.



Initiatives such as increasing local and SME spend can be supported by a greater level of insight into which suppliers are being used across various categories or departments, highlighting trends and opportunities where spend could be re-directed.

Our Data Services team will work with customers to develop a format that is most convenient to extract the data from the financial system and provide to the team. It can be uploaded monthly, quarterly, or annually. Following each upload, spend is classified to the most

appropriate category using mapping rules that can be based on multiple criteria (supplier, invoice details, GL, and other subjective coding, etc.) and can be prioritised to obtain optimum levels of accuracy.

Supplier Portal

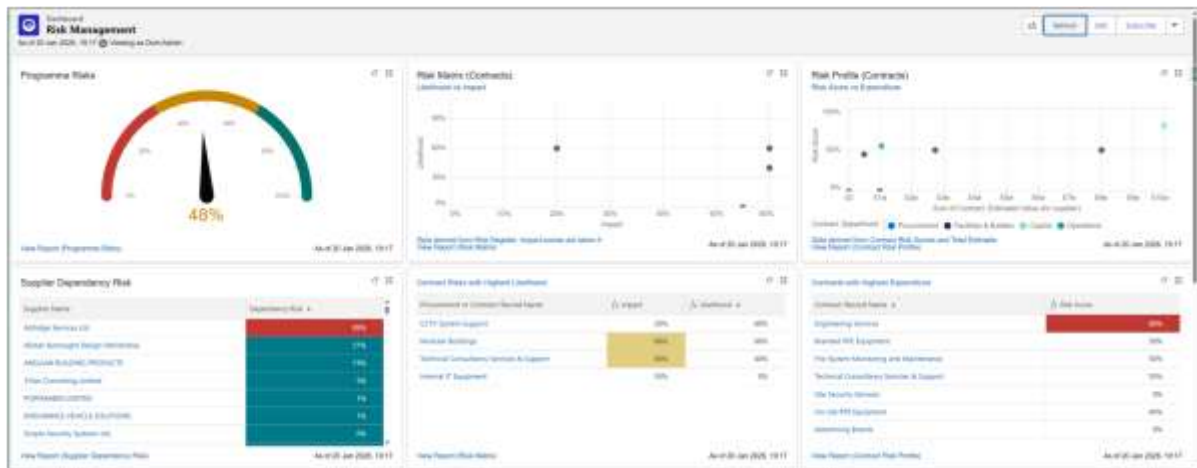
Supplier Portal provides a collaborative environment for suppliers to register themselves with the organisation, populate and maintain their own supplier profile information, participate in performance reviews and due diligence tasks and respond to tenders and RFx exercises.

When Tenders and market engagements are being advertised and published online, potential bidders will be directed to the Supplier Portal where they are able to browse documentation, express their interest and prepare their response. The Supplier Portal provides a secure environment within which the supplier can register multiple user accounts to work on responses, collaborate with buyers, raise queries and clarification questions, receive answers and share any information and documentation. Furthermore, when coupled with the Supplier Assessment enhancer, Atamis Supplier Portal provides the ability to issue supplier assessment questionnaires, enabling the collection and scoring of supplier information and helping to provide deeper insights into the supply chain.

Risk

With the Atamis Risk enhancer, organisations will be able to create and manage a live risk register within the system, linked to Pipelines, Tenders, Contracts and Suppliers. Potential risks can be added to the register, with the system able to calculate risk scores automatically, based on answers to specific questions. This helps stakeholders to understand the likelihood and potential disruptions of any given risk and enables sufficient planning in order to try and mitigate the risk, or avoid it altogether.

Where risks do transpire into issues, these can be recorded in the system also, helping Procurement teams and stakeholders to develop and manage a plan of action to control the issue and track the necessary activity required to resolve the issue successfully, and allowing the team to build up a valuable collection of lessons learned, for future projects.



Risk Management reports and dashboards will quickly draw attention to areas of most concern.

Where appropriate, and when used in conjunction with the Supplier Portal enhancer, risks and issues can be shared with suppliers via the Supplier Portal, meaning the supplier is involved in any development activities necessary to avoid risk and correct any problems.

Business Case

Using the Atamis Business Case enhancer will allow the drafting of business case documents within the system, where information from across the organisation as well as external sources can be brought together and presented to stakeholders as justification and reasoning for a chosen path, as well as seeking wider organisational contribution and approvals.

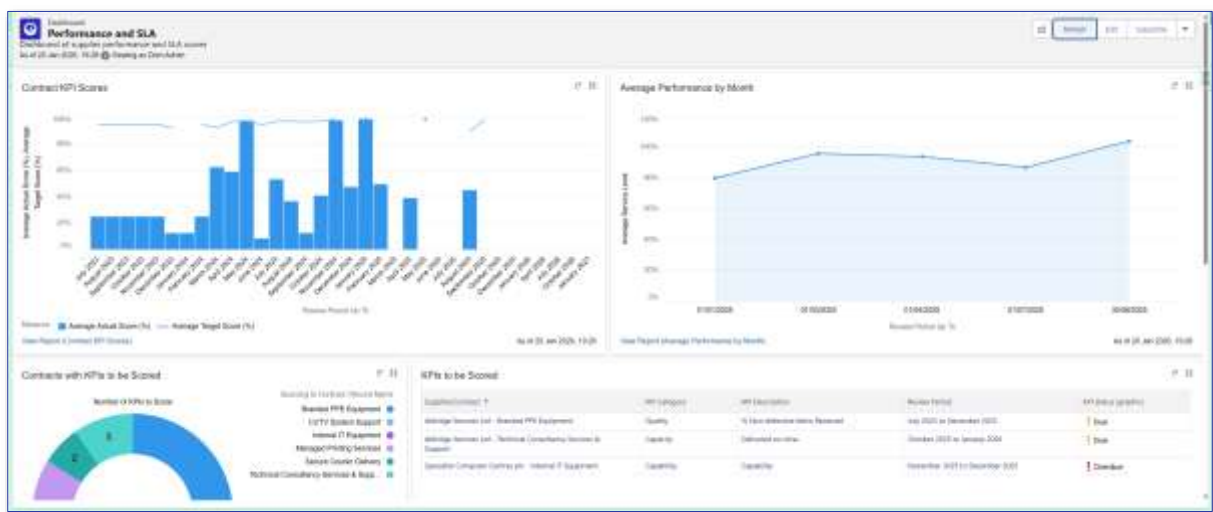
Any required information can be collected at this stage and used for reporting, to define approval workflows and governance, or simply for information purposes. Comments and suggestions on business cases can be managed in the system and any supporting documentation or file attachments can be added also.

Planning and analysis framework tools such as PESTLE and SWOT can be incorporated into the business case, and the business case can be referred back to during the subsequent projects, to ensure the promised targets are being met and included in the requirements, and that any lessons learned are being recorded.

KPI & SLA Monitoring

The KPI & SLA Monitoring Enhancer allows Procurement to document and record the details of agreed Performance and Service Levels associated to a contract, including where service credits may apply.

Integration with Supplier Portal means that suppliers can submit their own performance metrics directly into the solution, with the solution able to present the performance metrics on the buyer-side and begin calculating passes and fails as well as any service credits that may be due.



Dashboards allow subscriptions, which deliver important information directly to stakeholders inboxes.

Monitoring supplier performance allows Procurement to track if a supplier is meeting the agreed contractual service and if they are not, why. Performance information collected during a contract's lifecycle is of paramount importance when it comes to re-negotiating with a supplier at the end of the contract. Tools such as the automatic KPI scoring and automatic service credit calculations avoid the need for manual calculations, increase accuracy and ensure timely returns to suppliers and Finance teams.

Supplier Deduplication & Merge

Duplicate supplier records can occur for various reasons and can be difficult to identify and resolve efficiently, without losing important information. Whether suppliers have registered themselves multiple times, or internal users have created a new supplier account to award a new contract, if duplicate records begin to mount up, they can skew statistics and will undermine trust in the data.

Where contracts and spend are being split across multiple supplier accounts, without any indication that the supplier accounts relate to the same supplier, there is the potential to miss key indicators, such as total spend with a supplier and any supplier risk and due diligence checks that might be mandated for a supplier with significant spend. It might also affect how Procurement teams segment their suppliers, based on

the types and volumes of contracts awarded to a particular supplier. When information is spread across seemingly disparate records, these insights become difficult, if not impossible, to create.

Using Atamis Supplier Deduplication, the solution will regularly analyse the supplier directory looking for potential duplicate suppliers and highlighting these to Procurement and Supply Chain Management teams.

Record 1 Name (Data Source)		Record 2 Name (Data Source)		
Specialist Computer Centres plc (Supplier)		SCC UK (Supplier)		
MATCH ANALYSIS				
SUPPLIER FIELD	SUPPLIER-SPECIALIST COM	SUPPLIER-SCC UK	FIELD MATCH TYPE	FIELD MATCH MAX SCORE
Address	James House, Warwick Road, Birmingham, West Midlands	James House, Warwick Road, Birmingham	Ignore	
Charity Reg Nbr			Ignore	
Company Reg Nbr*	01428210	01428210	Key	
County	None	None	Ignore	
DUNS Number	227720521	227720521	Key	
Post Code	B11 2LE		Ignore	
SME?	Public Sector/Not known	Not SME	Ignore	
Size		e) Large	Ignore	

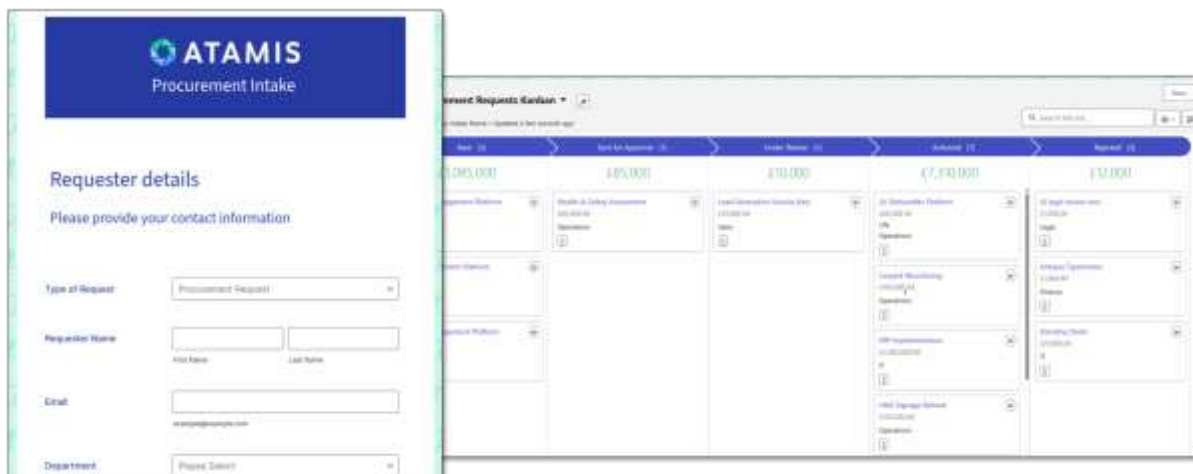
Supplier De-duplication provides an intuitive step-by-step approach to analysing and merging duplicate records.

When a duplicate is confirmed, the solution will be able to merge the records into one, avoiding any loss of information while auditing the entire process. Where accounts are merged in error, the solution includes a full reversal process to separate the accounts again.

Procurement Intake

For strategic Procurement teams who are overwhelmed by inefficient, manual processes for capturing business-wide procurement requests, Atamis Procurement Intake is an integrated 'front door' to procurement, that streamlines and automates the entire process from initial request, into strategic pipeline planning. Unlike relying on emails, spreadsheets, or disconnected form builders, Atamis Procurement Intake feeds structured, accurate data directly into the Atamis Pipeline App. This eliminates double keying, removes administrative bottlenecks, and frees your team to focus on managing demand, identifying opportunities to consolidate and standardise across the organisation and propose areas for savings potential or increased value generation, across all incoming procurement requests.

Procurement Intake presents a series of forms to stakeholders within the organisation. These forms do not require Atamis licenses and can be used by anyone who has access to the link. Links can be secured, to ensure that only genuine Procurement Requests are being submitted, before the request is automatically added to the Intake queue.



The image shows two overlapping screenshots of the ATAMIS system. The foreground screenshot is a 'Requester details' form titled 'ATAMIS Procurement Intake'. It asks for contact information and includes fields for 'Type of Request' (set to 'Procurement Request'), 'Requester Name' (with first and last name sub-fields), 'Email', and 'Department' (with a 'Please Select' dropdown). The background screenshot shows a dashboard titled 'Current Requests Dashboard' with a search bar and a grid of request cards, each displaying a status (e.g., 'Request', 'Approved') and a value.

Intake forms create a frictionless process from which to submit requests into Procurement Intake workflows.

Procurement teams can evaluate requests, seek clarifications and approvals, keep stakeholders updated with the status of their requests and progress requests seamlessly into downstream activities, for example, starting a new Pipeline Project from a request, creating a new supplier profile for onboarding or adding a below threshold contract into the Contract Register.

A full audit trail is captured from the moment the form is submitted, through any approval workflows and into subsequent procurement activities and contracts.

Atamis Integrations

Atamis supports an array of integrations with third party systems, to enable customers to embed Atamis and the strategic procurement processes, into their existing system landscape. Atamis integrations typically span the following categories;

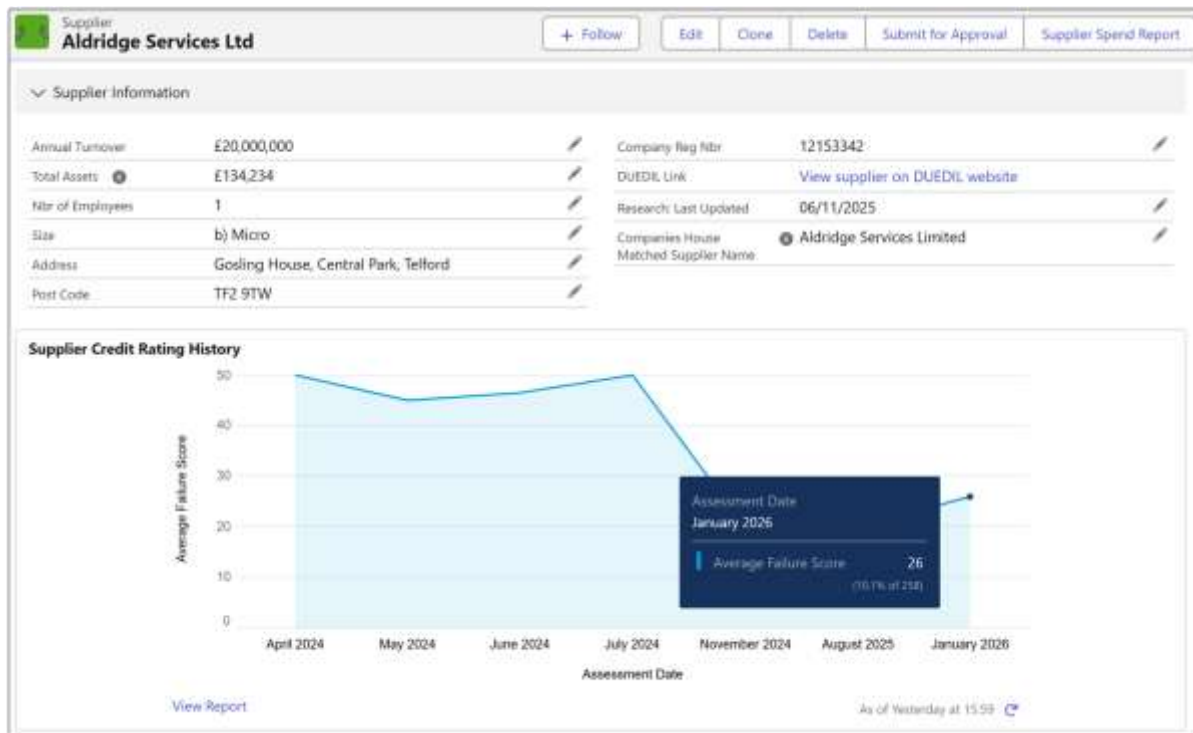
Data Enrichment

Data enrichment integrations provide access to external information which can then be overlayed top of the information already being collected and managed in Atamis. This can take various forms and include different types of information to provide various strategic lenses with which to analyse data and patterns.

Standard Atamis data enrichment integrations include information from Companies House, matching a UK registered supplier with their Companies House information and displaying information such as annual turnover, asset values, employee counts, company size etc. This information can be included into reports and used in automatic calculations to determine risk profiles etc.

Additional integrations can include the likes of CreditSafe or Dun & Bradstreet, which will display financial risk and credit rating scores, recording these within the supplier profile for easy access and historical reference. Integrations such as these make use

of the customer's own license to the third-party data providers and Atamis services to configure the connector.



Credit rating history allows organisations to easily spot trends that might present future risks.

Technology Integrations

Integrations with technology providers such as DocuSign, Commerce Decisions and other purpose-built solutions, enable customers to continue to use and benefit from their existing investments in that technology, while enhancing and streamlining user experiences. Technology integrations will ensure that information can be passed seamlessly between Atamis and third-party systems, avoiding the need to re-key information manually, increasing accuracy and efficiency and reducing user frustration.

Regulatory Integrations

Atamis supports Procurement departments across many regulated industries such as the Utilities sector, Financial Services industry and Public Sector. In order to provide the best possible experience for users within these industries, Atamis maintains a number of integrations with industry specific solutions.

For the Public Sector, these regulatory integrations primarily relate to the Public Contracts Regulations (PCR 2015), the Procurement Act 2023 and any new regulatory requirements that are introduced. By integrating Atamis directly with the UK Find a Tender Service, Contracts Finder and the Central Digital Platform, users will not have to leave Atamis in order to create and publish pipeline notices, contract notices, award notices, spend and performance reports etc. The whole process can

be controlled within Atamis, allowing organisations to put their own set of governance procedures around review and approval of notices before being published to the portals.

In addition to the notice integrations with FTS and CDP as part of the Procurement Act 2023 and legacy Public Contracts Regulations 2015, Atamis is also integrated to the Supplier Information Service part of the Central Digital Platform. This service allows suppliers to complete and maintain their own profile on the Central Digital Platform and use this information in any subsequent responses to public sector contracting authorities.

The suppliers are able to easily generate a share code within CDP, and will enter this share code into their response in the Atamis Supplier Portal. Atamis will automatically synchronise the supplier information from CDP and populate their response in Atamis. This drastically reduces the amount of time and effort required by suppliers when completing the PSQ (Procurement Specific Questionnaire) part of the response, allowing them to use the same information across multiple tender responses. When supplier information is updated, a new share code can be generated and used for any future responses. Atamis retains a full audit trail of the supplier responses provided each time, ensuring that any questions around historic supplier responses can be quickly answered, using accurate information held against the supplier's profile and their response within the Atamis system.

Other Integrations (including ERP)

Atamis architecture ensures that information can be integrated into other systems within an organisation's landscape. This can be in the form of custom integrations, developed between Atamis and customers, and third-party integrations, using a pre-existing integrations such as Salesforce Connectors or Salesforce Apps.

Atamis also supports the use of third-party iPaaS tools, such as Microsoft, Informatica, MuleSoft, Boomi and more. Using integration platforms such as these is still considered 'custom' integration, however, they provide a framework for customers to be able to orchestrate their own data flows between various line of business systems.

Any integrations outside of the pre-defined integrations catalogue are initially considered 'Other Integrations' and require scoping prior to pricing.

Solution Platform and Security

Platform and Architecture

Atamis is delivered as a cloud-native Software-as-a-Service (SaaS) solution built on the Salesforce Platform. This provides a highly scalable, resilient and secure foundation suitable for UK public sector, private sector and third sector organisations.

The Salesforce platform offers enterprise-grade infrastructure, including high availability, built-in resilience, and the ability to scale to meet changing organisational demand. Platform updates and security enhancements are delivered regularly by Salesforce as part of the managed service.

Atamis is deployed as a multi-tenant SaaS application, with each customer operating within their own logically isolated Salesforce organisation. This ensures customer data is segregated and protected from unauthorised access by other tenants.

Where required, customer data is hosted within UK-resident Salesforce data centres, aligning with UK public sector data residency expectations.

Configuration, Flexibility and Extensibility

Atamis is supplied with pre-configured best-practice templates, user roles, workflows, reports and dashboards aligned to UK public sector procurement and governance requirements.

The platform supports extensive low-code / no-code configuration, allowing the solution to adapt to organisational needs without requiring bespoke software development. Supported configuration includes:

-  Custom data fields and record types
-  Role-based page layouts and user profiles
-  Approval workflows and validation rules
-  Automated notifications and alerts
-  Custom reporting and dashboards

This approach enables customers to adopt Atamis quickly while retaining the flexibility to evolve processes over time, either during implementation or post go-live via controlled change management.

Integration and APIs

Atamis benefits from Salesforce's mature API framework, enabling secure integration with third-party systems such as ERP platforms, finance systems, document management tools and identity providers.

Integrations are implemented using authenticated, encrypted connections and follow the principle of least privilege, ensuring only the minimum level of access required is granted.

Security Architecture and Controls

Security is implemented using a defence-in-depth approach, combining Salesforce's native platform security controls with Atamis' internal governance, policies and operational processes.

Identity and Access Management

Access to Atamis is controlled through role-based access control (RBAC) using configurable user profiles and permission sets. This supports segregation of duties between administrative, operational and reporting roles.

Atamis supports:

-  Single Sign-On (SSO) using SAML 2.0
-  Integration with customer-managed identity providers such as Microsoft Entra ID (Azure AD)
-  Multi-Factor Authentication (MFA), enforced either natively within Salesforce or via the customer's identity provider

User access is managed through formal joiner, mover and leaver processes, ensuring access is granted, amended and revoked in a controlled and auditable manner.

Data Protection and Encryption

Customer data is protected using Salesforce's standard industry-recognised security controls, including:

-  Encryption in transit using TLS 1.2 or higher
-  Encryption at rest using AES-256

Salesforce manages platform resilience and backups in line with its published security and availability commitments.

Audit Logging and Monitoring

The platform provides detailed audit logging and activity tracking, including:

-  User authentication events

-  Configuration and permission changes
-  Data access and modification activity

These logs support internal monitoring, incident investigation and customer assurance requirements.

Secure Change and Release Management

Changes to the Atamis platform are managed through a controlled change process, including:

-  Use of non-production environments for configuration and testing
-  User Acceptance Testing (UAT) prior to deployment
-  Controlled releases aligned with Salesforce release cycles

This ensures changes are introduced safely without impacting platform security or stability.

Compliance and Assurance

Atamis operates an Information Security Management System (ISMS) aligned to ISO/IEC 27001, alongside a Quality Management System aligned to ISO 9001.

Atamis also maintains compliance with:

-  Cyber Essentials and Cyber Essentials Plus
-  UK GDPR and the Data Protection Act 2018

Security policies, risk assessments and controls are reviewed regularly and are subject to internal and external audit.

Accessibility

Atamis complies with the Web Content Accessibility Guidelines (WCAG) 2.1 Level AA, supporting accessibility requirements for public sector organisations and ensuring the platform is usable by individuals with disabilities.

Atamis Backup Solution

Atamis provide a managed, AWS-based backup and recovery service for customer Salesforce data, designed to meet public-sector expectations for data protection and recoverability.

-  Independent backups outside the Salesforce platform
-  UK-hosted AWS storage (UK region)
-  Customer-specific data segregation
-  Defined retention and recovery options
-  Aligned to ISO 27001 / ISO 22301 principles

How it works

Incremental backups are taken from the customer's Atamis solution.

-  Data is encrypted in transit and at rest.
-  Backups are stored in AWS S3, with lifecycle policies applied for cost-effective retention.
-  Each customer's data is logically segregated and access-controlled.
-  Backups are monitored and validated as part of Atamis' operational controls.

Configuration & options

The service is intentionally configurable so we can meet different customer risk appetites without over-engineering.

Configurable elements include:

-  Backup frequency (e.g. daily incremental)
-  Retention period (e.g. 30, 90, 180 days or longer by agreement)
-  Storage tiering (standard vs archival tiers)
-  Restore scope (individual records, objects, or full datasets)
-  Environment coverage (production only, or including non-prod)

This allows us to position a baseline “standard” option in G-Cloud, with enhanced options clearly documented as optional.

Retention

-  A standard retention period can be defined for G-Cloud (e.g. 90 days), aligned to typical public-sector expectations.
-  Longer retention periods are available where required for regulatory, audit, or operational reasons.

Restore & recovery

Restores are Atamis-managed, requested via support.

-  Recovery can be targeted (e.g. specific records or objects) rather than full org rollback.
-  This avoids the operational and data-integrity risks associated with platform-wide restores.

Supporting Services

Implementation and Professional Services

A comprehensive Client Briefing Pack is provided to all new clients containing a step-by-step guide of all data requirements and resource actions required for the implementation of Atamis.

Atamis solutions are highly flexibility, as such, the initial parts of the implementation focus on workshops for each app/process to facilitate the gathering of specific requirements. This allows the Implementation team to recommend best-practice within Atamis to achieve those outcomes, as well as identifying areas that may need adjusting (as part of the implementation) or configuring (as part of Change Management).

All new clients are assigned a project manager who will oversee the implementation and provide regular updates along with related documentation including a Project Initiation Document, Project Plan and Roles and Responsibilities (RASCI) document.

This approach aims to orient you to our out-of-the-box solution first and foremost and then run a number of client workshops to understand where you may need to adjust the solution to fit specific requirements. Once agreed, Configuration Specialists will proceed with the build & UAT will be performed to ensure all aspects are approved.

Initial build, configuration and testing is typically done in the environment that will become the Production environment. Following sign-off, a copy of the Production environment is made for the Sandbox environment. This is where any further testing and training is usually carried out, when in Business as Usual.

Client Responsibilities

Client involvement is a necessity in the implementation of Atamis, however the level of involvement and timespan of a project will be impacted by the level of configuration or alterations from the standard 'out-of-the-box' solution.

Clients will be required to:

-  Actively take part in scheduled training & configuration workshops. We recommend having key stakeholders available for all planning stages to ensure all requirements are scoped appropriately.
-  Provide configuration details to allow Atamis to generate templates.
-  Perform testing and validate system configuration.

Training

Training is provided as part of the implementation and onboarding process. Usually the training involves an initial walkthrough of the 'out-of-the-box' solution, to help stakeholders familiarise with the solution and set the stage for workshop discussions around additional configurations that may be required. Apps tend to be implemented in series, each with their own dedicated training programme scheduled as part of the delivery plan. These training programmes will be tailored to the final build configuration of the client system.

The delivery of training programmes will be agreed with the project manager at the outset of the project. Atamis offer both remote and on-site training options and provide a user guides for ongoing reference.

Change Management

Following client transition from Implementation into Business as Usual, any additional requirements or re-configurations will be handled through the dedicated Change Management process. This helps to ensure that requests for amendments to client systems are captured, scoped, implemented and tested fully, in partnership with client representatives.

Capture - Change requests are typically discussed with the Client Success Manager, who will be able to gather information and advise on some of the best approaches to achieving the desired outcomes. When ready to be submitted, either clients or Client Success Managers can raise the Change Request via the Support Helpdesk. This ensures that requests are being captured, reviewed and assigned in a structured and timely manner, and can be tracked by clients through the same Support portal as their other tickets.

Scoping - Regardless of the scale of the change, it is crucial to fully understand the requirements and provide a professional assessment of how the change will be delivered, including any potential impacts on related processes. To achieve this effectively, internal discussions within Atamis are often necessary, along with analysis using Workbench or other DevOps tools. This ensures that the optimal solution is identified and delivered in alignment with the core service offering.

Testing - All configuration changes to client systems must undergo internal testing before being released for client acceptance testing and approval. Every change is tested in a sandbox environment before being deployed to the live environment—regardless of whether the client utilises their own sandbox. This rigorous testing process ensures that any potential unintended consequences are identified and mitigated before implementation.

Approval Process - All changes require approvals, these approvals are both internal within Atamis for quality checking purposes and approvals from the Client to ensure they are content with the build, testing is successful and the move into the Live environment is well considered.

Client Support

As part of the service, Atamis provide support for both clients (buyers) and their suppliers. Atamis Support Desk uses a ticketing system, allowing clients to raise tickets quickly via email or the online portal, and be kept up to date with status updates and dialogue with the support team.

Scope of Service

In Scope

The Atamis Support service covers the following for authorised support contacts:

-  **System Availability:** Ensuring the platform meets the agreed uptime percentage of 99.9%.
-  **System Bug Fixes:** Investigation and resolution of defects within the Atamis system. Support for this is unlimited.
-  **End User Support:** Assistance provided to designated support contacts on topics such as user guidance, forgotten passwords, system errors, and administrative help.
-  **Supplier Support:** Direct support for suppliers on topics like basic how-to questions and end-user assistance.

Out of Scope

The Atamis Support service does not cover the following activities. These may be available as a separate, chargeable service:

-  Inquiries related to new configurations, feature requests, or ad-hoc data maintenance requests will be directed to the appropriate department for consideration and may incur additional fees at SFIA day rates.
-  End-user training and the creation of bespoke training materials.
-  Support for issues arising from third-party software, client-side network problems, or integrations not managed by Atamis.

Roles and Responsibilities

Atamis Support Responsibilities

-  Provide support during the hours specified in the client's support plan.
-  Acknowledge receipt of a new support case to the case owner.
-  Review and assign correct priority level (PL1-PL4) to each case based on the definitions in this document.
-  Use all reasonable efforts to meet the target response and resolution times.
-  Communicate a proposed resolution or provide a statement detailing the steps and estimated timelines to resolve the issue and provide a workaround or action plan where one exists.

Client Responsibilities

-  Appoint designated support contacts who are authorised and trained users of the Atamis system.
-  Ensure all support requests are logged through the official channels outlined in this document.
-  Provide a clear, detailed description of the issue, including any error messages, screenshots, and steps to replicate the problem.
-  Collaborate with the Atamis support team by providing timely responses to requests for additional information.

Off-Boarding

Atamis assures that prior to termination of the contract, regardless of the reasons for termination, it will provide a full data extract.

Atamis includes system reports that end users will be able to run that will extract all data directly. Data can be exported in either Excel or CSV formats. Upon termination of contract, Atamis can provide a final handover of all data held on the system belonging to the Customer back to the customer including original datasets sent, database tables and files used to upload data into Atamis. Data can be provided via any secure format as required.

Following termination of contract, the system will be decommissioned within 1 month. Atamis can, with written agreement of the Customer, delete and destroy all data held on their systems belonging to the Customer and provide the customer with a written certificate confirming the data, time, place and means by which all data was deleted and destroyed. Termination terms are provided under Atamis standard Terms and Conditions.

Atamis and any related third-party data destruction / deletion practices are fully compliant with UK GDPR requirements and client / authorities' requirements.