



FINWORKS PLATFORM SERVICE DEFINITION

(G-Cloud 11)

Prepared for:

G-Cloud 11

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1 Introducing the Finworks Platform

The Finworks Platform is a Low Code Platform for rapidly creating robust departmental or enterprise or multi organisation applications with a combination of one or more of the following **powerful capabilities** for:

- **User Collaborations and Document Management,**
- **Case Management and Business Process Workflows,**
- **Data Management and Data Governance,**
- **Analytics, Machine Learning and AI**

The Finworks platform is designed to deliver custom SaaS applications that enable you to realise the digital transformation of key parts of your business at a speed and cost that give you a sustainable advantage.

To allow you to deploy your Finworks Platform based SaaS solution in the context best suited

> **Cloud Hosting:** The platform can be easily deployed on

- well-known cloud platforms like
 - Amazon AWS,
 - Microsoft AZURE,
 - Oracle Cloud,
 - GE Predix
 - and others.
- or on dedicated commercial data centre infrastructures
 - either from Hosting Vendors
 - or those already present in suitable inhouse on-premise data centre facilities.

> **Edge Hosting:** The platform can also be deployed in suitable edge computing environments where you need robust services with all the benefits of resilience and low operating cost of cloud services but need to locate the service very close to the devices that interact with it.

This can be on any suitable Edge Computing Platform including

- Edge Compute Fabrics in Buildings
- Rugged Edge Computing Fabrics in Factories or Utility Works
- Field Deployable Autonomous Edge Computing Units for use alongside transport infrastructure such as Railway Tracks, Roads or utility assets such as Power, Water, or Gas networks, in agriculture, alongside outdoor festivals and events and other scenarios. Field deployable units can be configured to be independent of mains power and are able to work well even with very limited connectivity back to the cloud.

2 Case Management, Workflow and Collaboration

The Finworks Platform is a low code platform that is ideal for a broad range of case management, collaboration, workflow, business process management tasks.

Typical applications include:

- > Case management;
- > Learning Management Platform for multi organisation learning communities
- > Facilitating collaborative processes, especially secure collaboration with third parties;
- > Document management and data sharing;
- > Processing applications for licences, permits and other documentation;
- > Vetting individuals, suppliers and businesses including security vetting processes;
- > Orchestrating inter-agency review of sensitive information;
- > Booking services, including associated invoicing and payment management;
- > Onboarding participants into services;
- > Managing suppliers and/or the procurement of services, products or components;
- > Orchestrating services provided by third parties (e.g. transport, accommodation)
- > Managing complaints and ombudsman services;
- > Managing compliance and other regulatory processes;
- > Managing financial services (e.g. applications for loan guarantees); and
- > Asset management

3 Data Management, -Governance and Analytics

The Finworks Platform as a low code platform also provides unique data management, data governance and very powerful analytics including machine learning and AI.

Typical challenges other customers have used the Finworks Platform for are:

- > Rapidly create complete applications which may require complex time critical workflows, have to integrate many with many often complex data sources/systems/external workflows and provide all the enterprise class attributes like auditability, fine grain role based access control, integration into corporate authentication systems etc.
- > Managing “Big Data” (i.e. multiple terabytes up to petabytes): smart data discovery and quality assurance, automated data transformation, fast querying, secure re-distribution, and automated reporting and workflow triggers;
- > Sorting slow query performance, again without replacing existing systems, where one or more SQL database(s) are facing challenges because of the complexity of the queries they’re running or the scale of the data they’re processing;
- > Generating real time dashboards and reporting from multiple data sources;
- > Bridging from a set of legacy data stores to a modern business information platform (e.g. Tableau, QlikView), particularly where performance improvement is needed versus direct connection to the data stores;
- > As a smart and highly economic ETL (Extract, Transform & Load) tool;
- > Transforming legacy data into a new dataset which is compliant with a specified ontology or data dictionary;
- > Automatically verifying legacy data compliance with an ontology or data dictionary
- > Improving the performance and manageability of legacy databases and other data stores without having to replace existing systems;

2 Service Overview

Low Code Platform – Rapidly create complete applications which may require case management, workflows, collaboration or complex time critical process flows, have to integrate many with many often complex data sources/systems/external workflows and provide all the enterprise class attributes like auditability, fine grain role based access control, integration into corporate authentication systems etc.

2.1 Case Management, Workflow, Collaboration Use Cases

- > Workflow Management Platform – For powering and automating mission critical workflows and business processes.
- > Case Management Platform – A secure, fully featured, extensively configurable, structured case management system.
- > Learning Management Platform – A secure, fully featured, extensively configurable, structured learning management system for learning communities in large organisations.
- > Workflow Enhancement For Content Management Systems – To provide structured workflow on top of legacy content, document, case management or CRM systems, avoiding the pain and cost of replacing those systems.
- > Collaborative Business Process Management (BPM) Platform – To support you in defining, managing, automating and operating collaborative business processes.
- > Secure Document & Data Sharing Platform – For sharing information internally, between departments, and with agencies, suppliers and other third parties.
- > Asset Management System – For public sector organisations to track and manage a wide range of assets throughout their lifecycle: machinery and vehicles, IT equipment and software, intellectual property and contractual assets.

Each of these configurations can be used with others in a single instance of Finworks Platform, allowing you to deploy it for multiple purposes and maximise your return on investment.

2.2 Data Management, -Governance and Analytics Use Cases

- > **Data Management Platform** – Brings together multiple data sources and quality assures and manages them as a single data repository for re-distribution to other systems or for fast direct querying and reporting.
- > **Data Discovery Platform** – Tames large, often fast changing, collections of structured, semi-structured and unstructured data and documents, cleaning, transforming and unifying it into a single repository, and - if desirable – verifies compliance with a data dictionary or ontology.
- > **Big Data Platform** – Rapidly ingests even petabyte scale data with automated smart data preparation and transformation. Allows you to query the data using SQL on Hadoop and/or distribute it securely to other systems.
- > **Smart Big Data Virtual Appliance** – Provides a query and dashboard solution powered by Spark and Hadoop for deployment into any data centre to combine data from multiple data sources and provide ultrafast query/dashboard performance.
- > **SQL Database Query Platform** – Delivers massive query acceleration for SQL databases, joining up multiple SQL (and other) data sources into a single, highly performant and SQL-queryable, data repository. Low cost to implement and operate as you can port existing SQL queries and apply SQL existing skills.
- > **ETL & Data Integration System** – Replaces traditional ETL with smart data discovery and orchestrated/automated data transformation, validation and redistribution. Extracts, intelligently cleans, integrates, transforms and loads data of any size and complexity within or into the data centre(s) of your choice.

Each of these product configurations can draw on the full power and feature set of the Data Platform, allowing you to deploy it for multiple purposes and thereby to maximise your return on investment from the deployment.

2.3 Data Management, -Governance and Analytics Use Cases

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Each of these product configurations can draw on the full power and feature set of the Data Platform, allowing you to deploy it for multiple purposes and thereby to maximise your return on investment from the deployment.

2.4 IOT Edge Computing Use Cases

- > **IOT Edge Node Deployment Platform** – Deploy low-code applications, data discovery, data management, machine learning and high performance workflows into highly resilient autonomous edge computing nodes in challenging and/or remote environment.
- > **IOT Edge Low Code Platform** – Rapidly create complete applications which may require complex time critical workflows, have to integrate many with many often complex data sources/systems/external workflows and provide all the enterprise class attributes like auditability, fine grain role based access control, integration into corporate authentication systems etc.
- > **IOT Edge Data Management Platform** – Brings together multiple data sources and quality assures and manages them as a single data repository for re-distribution to other systems or for fast direct querying and reporting.
- > **IOT Edge Data Discovery Platform** – Tames large, often fast changing, collections of structured, semi-structured and unstructured data and documents, cleaning, transforming and unifying it into a single repository, and - if desirable – verifies compliance with a data dictionary or ontology.
- > **IOT Edge Big Data PLATFORM** – Rapidly ingests even petabyte scale data with automated smart data preparation and transformation. Allows you to query the data using SQL on Hadoop and/or distribute it securely to other systems.
- > **IOT Edge Smart Virtual Appliance** – Provides a query and dashboard solution powered by Spark and Hadoop for deployment into any data centre to combine data from multiple data sources and provide ultrafast query/dashboard performance.
implement and operate as you can port existing SQL queries and apply SQL existing skills.
- > **IOT Edge ETL & Data Integration System** – Replaces traditional ETL with smart data discovery and orchestrated/automated data transformation, validation and redistribution. Extracts, intelligently cleans, integrates, transforms and loads data of any size and complexity within or into the data centre(s) of your choice.

>

Each of these product configurations can draw on the full power and feature set of the IOT EDGE PLATFORM, allowing you to deploy it for multiple purposes and thereby to maximise your return on investment from the deployment.

3 The Service in Detail

3.1 Key Features for Case Management, Workflow and Collaboration

3.1.1 Workflow & case management

- > Integrated case and workflow management
- > User-configurable workflows, business rules and case data structures
- > Powerful but easy-to-use visual process editor
- > User-configurable smart forms
- > Personal and team workbenches (inbox style operation)
- > Task and queue management, sharing and escalation
- > Prioritisation and exception management
- > User configurable event automation
- > Integrated document and content management – store, manage, search, version
- > Single document repository (and/or access documents directly from other systems)
- > Document flow automation
- > Complex interaction with databases and other data sources when used with Fincore's Data Management Platform
- > Complete audit history and version control
- > Customisable look and feel (branding and colour scheme)
- > Built with responsive design to work across all platforms
- > Business analysis support also available through G-Cloud (see our onboarding and support listing) and the Digital Outcomes and Specialists framework (DOS)

3.1.2 Content/case management systems enhancement

- > Finworks Platform can also be used to provide a workflow overlay on top of existing enterprise content management (ECM), document management, case management and customer relationship management (CRM) systems

3.1.3 Collaboration & document sharing

- > Secure multi-organisation workflows and collaborations
- > Secure global document upload/download over the Internet
- > Automated quality assurance to clean and validate information
- > Secure automated or manual information redistribution
- > Permissioned "bulletin boards" (interactive dashboards) for shared document access

3.1.4 Interoperation with other systems

- > Open architecture and APIs for easy integration to other systems: WebAPIs (Restful) and Web Services (SOAP)
- > Interfaces include Sharepoint, Dynamics, Drupal, Salesforce, JDBC and other databases
- > Also interfaces to Fincore's Data Management Platform for powerful data processing
- > Integration support also available through G-Cloud (see our onboarding and support listing) and the Digital Outcomes and Specialists framework (DOS)

3.1.5 Management information and reporting

- > Transparent monitoring, supervision and operational review capabilities
- > Dashboards and reporting
- > Real time reporting on process efficiency and cycle times

3.1.6 Permissioning & archiving

- > Granular - down to individual information field and/or action – user-defined role-based security permissioning
- > Data archiving (or secure data erase after a time limit)

3.1.7 Scalability & resilience

- > Highly scalable application and hosting architectures
- > The Standard Service hosted on Microsoft Azure, configured to be eligible for Azure's 99.5% availability SLA
- > Our Custom Service can include high availability configurations, eligible for Azure's 99.9% availability SLA, or fully mirrored hosting
- > Various disaster recovery options are available (see Section 5.9.2 below)

3.2 Key Features for Data Management, -Governance and Analytics

3.2.1 The Basics

- > Load data – structured, semi-structured, unstructured documents and data
- > Automatically identify file and data types
- > Apply automated rule-based quality assurance
- > Unify all data sources into a single, queryable, data repository
- > Apply automated or manual data transformations
- > Automatically or manually distribute cleaned and transformed data to other systems
- > Query data with massive performance improvements over SQL querying
- > Create dashboards and reports
- > Scale elastically as your data processing requirements grow

3.2.2 Data Discovery & Transformation

- > Smart, automated (highly efficient) discovery and transformation processes
- > Automated ingest of data from files, databases, message streams and APIs
- > Information combined from many systems and sources
- > Ingest on demand or orchestrated via work schedules and event triggers
- > Automated analysis of new data sources/feeds
- > Discovery engine learns to interpret your data from prior practice
- > Smart automated quality assurance, compliance, de-duplication and cleaning
- > Automatic creation of compound records for customers, products, etc
- > Easy creation of insertion, extraction, transformation, validation and compounding workflows
- > Automatic verification of compliance with data dictionary or data ontology

3.2.3 Data Sources & Connectors

- > Can handle “Big Data” if needed (i.e. multiple terabytes to petabytes)
- > Built-in interfaces to many types and formats of data source
- > Database connectors include: MySQL, SQL Server, Oracle, Sybase, ASE/ASA, JDBC
- > Big Data connectors include Cassandra/Datastax, Hadoop, Spark, Hive, MongoDB, graph databases
- > Message stream connectors include: Kafka/Spout frameworks, webhook endpoints, Twitter, Facebook
- > Web API connectors include: Web Services (SOAP), WebAPI (RESTful), Webhooks, WebSocket

3.2.4 High Performance Queries, Analytics, Machine Learning and AI

- > Massive query speed improvement over traditional SQL databases
- > Runs MySQL and SQL92 compliant queries on any data source
- > Can run existing SQL queries with no/minimal change
- > Powered by Spark and Hadoop for performance
- > SQL querying is executed as SQL on Hadoop
- > N.B. You will not need specialist Spark/Hadoop/Big Data skills to use the platform
- > Cassandra, MongoDB and Neo4J are available as alternatives to Spark/Hadoop
- > We can also support you with query optimisation expertise either as part of our onboarding and support services via G-Cloud or under the Digital Outcomes and Specialists framework (DOS)
- > Spark Machine Learning
- > Integrate other AI and Machine Learning Capabilities seamlessly.

3.2.5 Interoperation with Other Systems

- > Open architecture with open APIs
- > Easy integration to other systems including legacy data silos
- > Quality assured and transformed data can be distributed securely to other systems
- > Easy interfacing to industry standard analytics and business intelligence tools
- > Integration services can be provided either under G-Cloud or the Digital Outcomes and Specialists Framework (DOS)

3.2.6 Management Information, Reporting, Audit Logging & Permissioning

- > User defined dashboards and reporting
- > Workflow trigger capabilities – execute specific actions on the basis of data processing results, e.g. trigger e-mails, generate reports/dashboards, write to databases
- > Comprehensive audit logging
- > Granular role and individual data field security permissions

3.3 Interfacing & Integrations

Finworks' Data Platform has an open architecture with extensive APIs. Integration with modern software systems is usually straightforward. We can also integrate to older legacy systems. For integration services, please see our G-Cloud onboarding and support listing, or our Digital Outcomes and Specialists framework offering.

3.4 Interfacing & Integrations

Finworks Platform has an open architecture with extensive APIs. Integration with modern software systems is usually straightforward. We can also integrate to older legacy systems. For example, for existing customers we have used our standard APIs to build custom interfaces to Microsoft SharePoint, Microsoft Dynamics, Salesforce and a number of bespoke in-house systems. For integration services, please see our G-Cloud onboarding and support listing or our Digital Outcomes and Specialists framework (DOS) offering.

Finworks Platform also interfaces to Fincore's Data Management Platform, creating a combined platform that is uniquely capable of powering workflows that require interaction with complex and/or large scale data sources.

3.5 Hosting and Technical Requirements

Finworks Platform is a SaaS application that can be deployed into any data centre: public, private or hybrid cloud, with hosting contracted either directly by the buyer or by Finworks. The Standard Service includes hosting in Microsoft's Azure public cloud.

Restricted VPN access, IP address whitelisting, two factor authentication or secure provision of the service on a public network (e.g. PSN, N3) can be implemented for increased security, along with other personalised security measures. Additional charges may apply for these add-ons.

Aside from having adequate bandwidth to access the service over the internet, reasonable specification modern PCs/mobile devices, and browsers as specified in Fincore's G-Cloud listings, there are no other specific technical requirements applicable to the customer.

3.6 Onboarding

On-boarding is an easy process and, depending on your requirements, can be achieved very quickly – in many cases, you can be up and operating in as little as 4 weeks, especially where an phased, agile, rollout approach is taken.

We can help with all aspects of deployment, configuration, interfacing and integration to other systems. If needed, we can also help you migrate from other systems and services.

For further information, please see our G-Cloud listing for onboarding services or our Digital Outcomes and Specialists framework (DOS) offering.

3.7 Offboarding

When you decide you no longer need our service, we can export your data in a documented open standards file format (e.g. XML, CSV, ODF) for archiving purposes or to facilitate your migration to an alternative service provider.

A basic export can usually be achieved in less than 5 working days. If you have more complex export requirements then additional time may be required.

Data exports will be charged on a time and materials basis in line with our SFIA ratecard.

3.8 Exit Plan

Offboarding is usually straightforward. However, a standard exit plan/approach is included as part of our Standard Service:

- > To provide continuity of service, we will your extend service if requested for up to 12 months beyond any normal contractual termination point, on a 3 months rolling notice basis
- > During this period, the terms and conditions, and fees due, under the contract that has been terminated will continue to apply
- > On reasonable notice, we will undertake any reasonable actions required to transfer the service to a new provider, which may include:
 - Providing a project manager and any other resources necessary for the exit
 - Providing data extracts
 - Advising third parties on data structures and migration approaches
 - Documenting customer workflows, data structures and any intellectual property owned by the customer, or to be licensed on an ongoing basis to the customer, e.g. documenting interfaces to the customer's other systems
 - Maintaining the service and customer data for up to 3 months after final transfer of service (as a contingency)

- Secure final deletion of the data

All work under the exit plan will be charged on a time and materials basis in accordance with our SFIA ratecard.

3.9 Support & Helpdesk

Our support helpdesk provides access to workflow, case management and business process experts to support you as needed in getting the best from our platform.

We offer both Standard Support and Custom Support packages.

Support is charged separately from our SaaS subscription fees – please see our G-Cloud Pricing document for details of our support fees

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3.9.1 Standard support

per month “Capped Effort” basis.

Capped Effort support provides a predefined maximum monthly support effort with the option to request additional effort at SFIA ratecard prices if Finworks has the resources available at the time of the request. Unutilised effort cannot carry over to subsequent months.

Capped Effort support may include any of types of work in the Custom Support section below (Section 5.7.2). All support work will count against the agreed amount of Capped Effort, i.e. for Standard Support, the 2 days of effort, other than:

- > Application and hosting maintenance that is undertaken simultaneously for the benefit of all customers;
- > Standard service monitoring; and
- > Capacity management.

The target maximum response time for critical service issues, during support hours, is 30 minutes.

3.9.2 Custom support

We can provide Custom Support on a 9 to 5, 7 to 7, 24/7 or custom basis, applying either an SLA or Capped Effort approach.

The scope of Custom Support arrangements is extremely flexibly, and support fees will typically be structured to encompass the following types of support and maintenance work:

- > Helpdesk service and associated issue resolution – usually 3rd and 4th line but can be expanded to include 1st and 2nd line
- > Major incident (e.g. disaster recovery) and security incident management
- > Incident escalation
- > Maintenance (application and hosting)
- > Service monitoring
- > Capacity management
- > Release management, which will typically include:
 - Implementation and rollback plans
 - Release notes and other release documentation
 - Complying with our customers' standard release processes
 - Internal release testing
 - Support to customer UAT testing and live proving for upgrade and issue resolution releases
- > Backup and disaster recovery management
- > KPI reporting (frequency as agreed with the customer)
- > Service reviews (frequency as agreed with the customer)
- > Support for the customer's ongoing internal documentation of Service Delivery Packages and other necessary customer internal documentation
- > Day-to-day security management, including:
 - General provision and maintenance of secure services
 - Key and certificate management
 - Patching
 - Anti-virus management
 - Log analysis and review
 - Annual updates to the security documentation
 - Attendance at customer security reviews
 - Maintenance of risk and issue logs
- > Other operational management and assurance activities as may reasonably be required. For example:
 - Attendance at governance groups
 - Attendance at general meetings and workshops in respect of the operation, management and further development of the service
 - Participation in architecture and design reviews
 - Support of test witnessing in respect of upgrade and issue resolution releases
 - Other assurance activities that the customer may reasonably require

Please see our G-Cloud onboarding and support listing for further details, or contact us directly:

- > marcelle.vonwendland@fincore.com; or
- > 020 7397 0620 and ask for Marcelle von Wendland

3.10 Service Upgrades & Maintenance

3.10.1 Service upgrades

You will benefit from major service upgrades up to twice a year. These upgrades must be adopted within 3 months of release. We will provide you with a test environment configured as per your live environment so that you can preview the changes.

3.10.2 Service maintenance

As we provide systems that are often expected to run 24/7 we aim to agree maintenance windows that fit in with your mode and hours of operation.

Typically, we would like to have the option of a monthly 8 hour service window (N.B. unlikely to be used more than 4 times per year), which we prefer to be in the early evening or during daytime at the weekend. However, we appreciate this may not always be practical and will do our best to agree a window that works for you.

At an additional charge, we can also provide high availability or mirrored systems for customers who require zero downtime for maintenance.

3.11 Backup, Disaster Recovery & Business Continuity

3.11.1 Backup

Daily offsite backup is included in the Standard Service. Storage charges may also apply above thresholds. Enhanced backup services can also be provided on a time and materials basis charged in line with Fincore's SFIA ratecard.

3.11.2 Disaster recovery

Disaster recovery is included in the Standard Service based, building from the last offsite backup. If the disaster recovery plan is activated then a new hosting environment for the service will be built in an alternative public cloud data centre, and the last backup will then be restored to the new environment to recreate the service. Target recovery time is 4 working days, with a target maximum data loss of 24 hours.

Hot standby disaster recovery can be provided at an extra fee (see our pricing document). This reduces the target recovery time to 4 working hours (working hours are: 9am-5pm, Monday to Friday, excluding public holidays) and the target maximum data loss to 1 hour.

We can also provide a custom disaster recovery plan, or a high availability mirrored service, to further reduce disaster recovery timescales, including extending support for disaster recovery to weekends and public holidays. Additional fees will apply.

3.11.3 Business continuity

Finworks maintains a general business continuity plan under its ISO27001 information security management system, which anticipates how we would continue to operate our business under a broad range of disaster scenarios. As our software can be flexibly deployed into an reasonable quality data centre and remotely managed, providing continuity of service in a disaster scenario is reasonably straightforward.

3.12 Training

We can provide training either directly to end users or on a train-the-trainer basis. We can also support the production of tailored training materials.

3.13 Agile Software Development

Fincore's software is highly configurable and we hope that it will rarely, if ever, be necessary to build additional software components for individual customers.

While provision of bespoke software development services is not permitted under G-Cloud, we can provide agile development – solely in relation to Fincore's own products – under the DOS (Digital Outcomes and Specialists) framework.

4 Information Security & Quality Standards

4.1 Information Security Standards

Fincore operates an ISO27001:2013 certified information security management system. We are experienced in offering secure services to government and regularly subject to IT Health Checks and penetration testing by independent third party assessors.

Our services currently hold information classified at Official Sensitive level. We would be happy to discuss arrangements for holding information of a higher classification.

Our project management, deployment, support and devops teams, and relevant directors and senior managers, are vetted to Security Check (SC) level (sponsored by the Home Office).

Our service has very granular - down to individual information field and/or action - role-based security permissioning.

4.2 Quality Standards

Fincore's services are certified to the ISO9001:2008 quality standard.

5 Demonstrations & Proofs of Concept

To show you the power of the platform, we would be happy to demonstrate it, or to implement a proof of concept or pilot. We are also happy to contract and deliver separate alpha and beta implementation phases in line with UK government best practice advice.

6 Ordering, Invoicing & Termination

Finworks Platform is provided on a monthly SaaS (Software as a Service) subscription. Support is charged separately, also on a monthly basis, as is any Custom Hosting (Standard Service hosting is covered by the SaaS fees). Please see our G-Cloud pricing document for full details.

Invoicing is monthly in arrears from the date the service is activated.

The service can be ordered via the contacts listed in Section 9 below.

Other than for proof of concepts, pilots and during staged implementations, termination is on 6 months' rolling notice.

Buyers can send notification of termination by e-mail to gcloud@fincore.com or by post to the address in Section 9 below.

7 Further Information & Contact Details

If you would like further information on our services, or specific advice on how we can configure them to your particular needs, then please contact us as follows:

Phone & e-mail

t: 020 7397 0620 and ask for Marcelle von Wendland

e: marcelle.vonwendland@finworks.com

Website

www.finworks.com

Address

Finworks
47 Mark Lane
London
EC3R 7QQ

8 About Finworks and Fincore

Finworks is a division of Fincore Ltd, providing the company's lowcode platform services and related support.

Fincore is a profitable, privately owned, SME.

We specialise in making complexity manageable. We love solving difficult problems for our customers, and can offer expert help, advice and solutions in the areas of workflow, case management, business process management, data management and “Big Data”.

Our public sector related customers include the Home Office (multiple implementations), the European Central Bank and Airbus Defence and Space.