## Service: Commercial Portal

Overview

The Engage Commercial Portal is a SaaS delivered portal delivering self-service, engagement and communication between those working in office developments and their landlord or property manager. The commercial portal offer comprises a portal for office workers in your offices to access services and a concierge portal for your front of house staff to manage visitors, parcels, temporary keys and bookable assets such as visitor parking bays, loading bays and meeting rooms.

Our customer portals are designed to enable you to deploy a trusted and reliable portal to those working in your offices, configured to reflect your services with functionality, personalisation and branding that works for you. If you have different brands for different sites, additional portals may be deployed to reflect this.

Our portals are developed using Microsoft technologies and content is managed through the Umbraco content management system. They are hosted in the Microsoft Azure environment in the EU and managed and monitored 24x7x365.
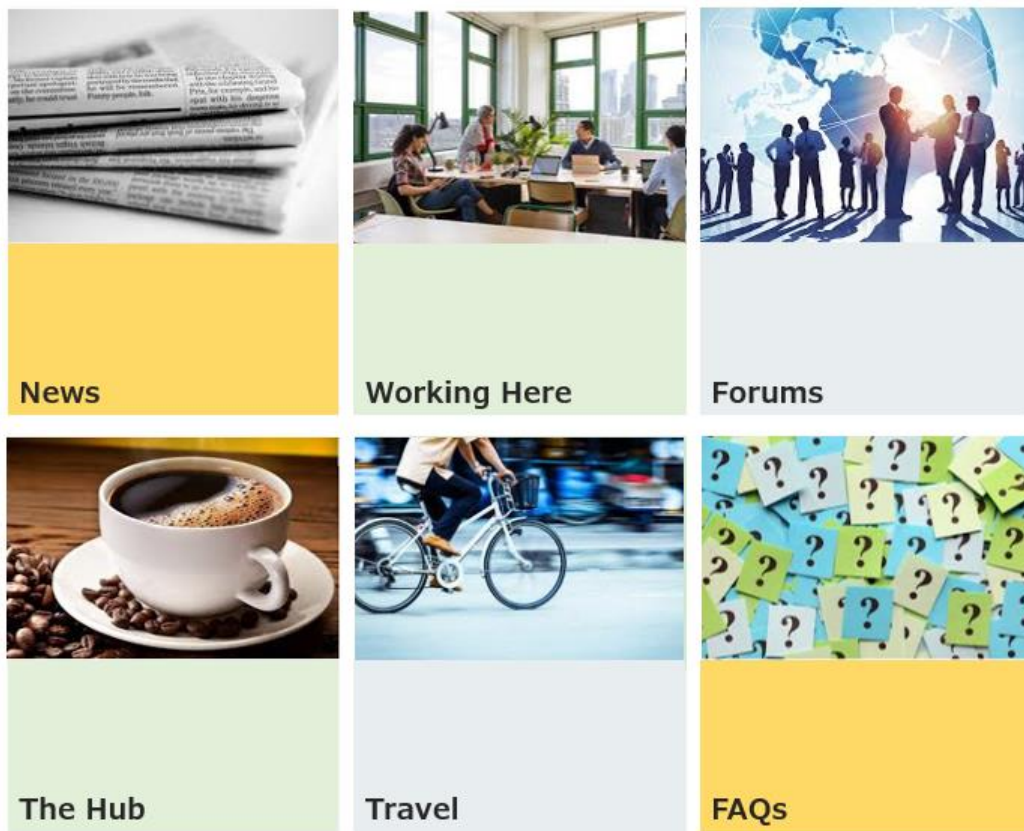
The content management system is intuitive to use and may be configured using member groups so that different teams can manage different content: we recognise that the key to the success of the portal is keeping content fresh and this can only be achieved if it is easy for our clients to manage content themselves. Engage incorporates Umbraco, an easy to use content management system, which can be accessed and updated from your office PC or when out and about from a mobile device.

Umbraco offers an easy Microsoft style user interface for non-technical staff with editing 'on the go' from mobile devices as well as PCs or Macs.

Access is role based, enabling different users to be granted different rights to change content. We will set these up at the start, but you can then easily add and change roles yourselves to maintain full control. Different permissions can be set for different roles. This gives you flexibility and control and allows different owners to manage different areas and content in the site. For example, one site-based team may be responsible for news and announcements to office workers whereas a different customer services team may manage forums and advice.

The ability to change content on the move offers added benefits, meaning that you can update news items quickly or change details about your services and properties as you need to. This is great when hosting events as photographs and updates can be shared, live on the portal.
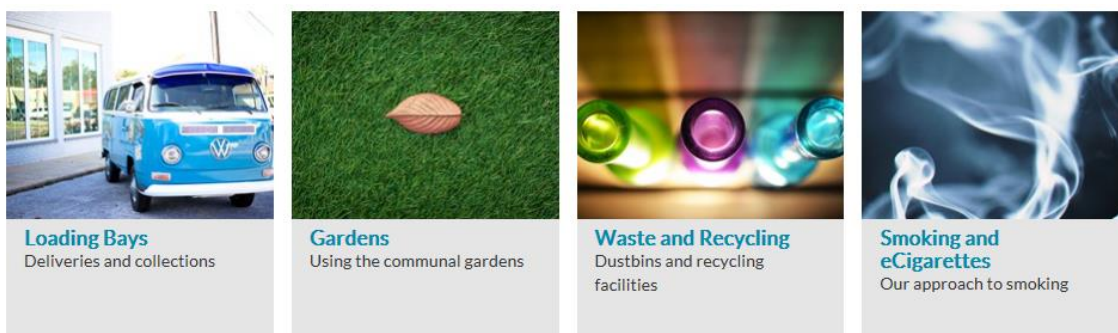
The pages in Engage are designed to enable you to easily change graphics, documents and appearance as well as text to ensure that the site remains fresh but use a variety of templates as controls to minimise risks with changes. The WYSIWYG (What You See Is What You Get) editor means that your content managers can see how their changes will look as they edit rather than having to publish to see their results, simplifying and speeding up the update process.

Engage recognise that requirements change and has built Engage with this in mind, allowing the end user to control changes.

Engage may be delivered standalone but also integrates with back office systems. Where we integrate with back office systems, we aim to operate under a policy of 'one single source of truth', that is, we aim to sit as a layer above your back-office systems and share information in real-time via API from these rather than synchronising or replicating data. This helps maintain data integrity and has security and control benefits.

Features and functionality offered through our portal includes:

- Registration and secure login for each user.
- News sections enabling you to share rich text, images and videos.
- Users may comment or 'like' news items which helps to promote engagement and discussion.

Loading Bays
Deliveries and collections

Gardens
Using the communal gardens

Waste and Recycling
Dustbins and recycling facilities

Smoking and eCigarettes
Our approach to smoking

My Neighbourhood

Leisure
Amenities

Terms of Service

Terms of Service
Privacy Policy
Terms and Conditions

Self Service
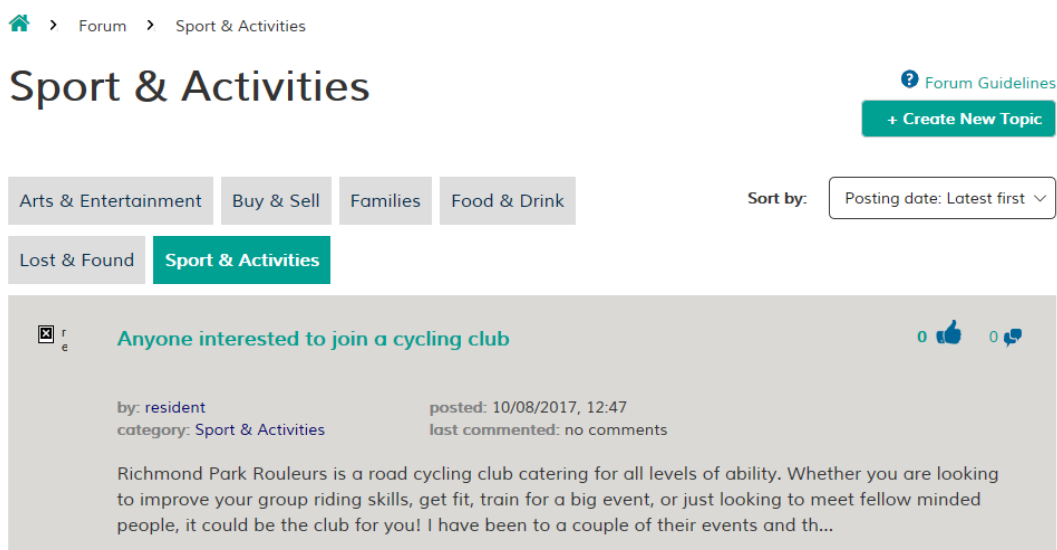
Statements
Documents
Maintenance
Contact

Need to talk to us?

Please give us a call on:
020 3882 1432

- Useful Information and FAQ areas for you to share information such as building policies and procedures along with content reflecting typical queries.

- Neighbourhood information including maps centred on office address showing places of interest – particularly important when staff relocate to your offices.
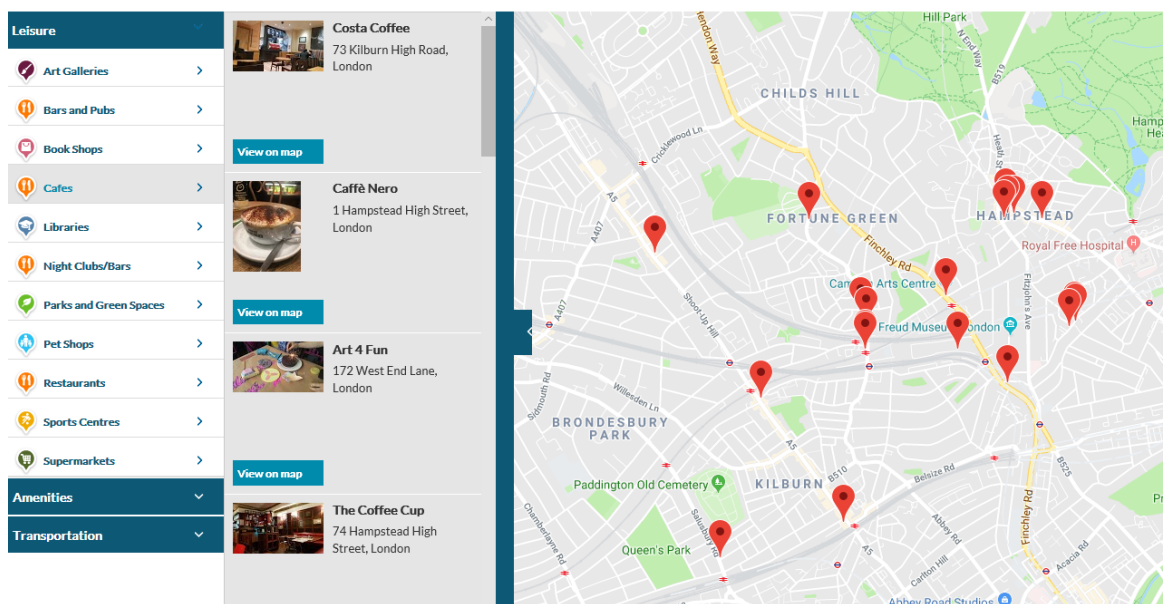
- Offers and promotions enabling you to be able to target offers and services direct to your workers – this may be offers exclusive to them, such as discounts at a local sandwich bar or services that you offer such as discounted cycle hire.

- Forums to promote engagement and give you valuable insight into the opinions and ideas of those working in your offices. They may be general for all residents or grouped for teams such as a social committee. Our forums are grouped into categories defined by you in the content management system and may be moderated by you. There is a reporting mechanism and individuals may be blocked if they breach forum guidelines.

- Online payments may be offered, and we already integrate with WorldPay and Sage Pay payment gateways and present links to AllPay. Other gateways may be integrated at additional cost.

- Statements and documents such as contracts, agreements or licences may be presented online to the contract holder with integration via API with your property management system. We will need to scope this with you and your system provider to confirm integration capabilities and establish costs and timeframes.

- Maintenance requests may be raised online and submitted through an easy to use form, with options to upload images to help clarify the request. We can also integrate with your repairs system via API. We will need to scope this with you and your system provider to confirm integration capabilities and establish costs and timeframes.

- Contact information is presented in the portal to share contact details for your different teams. Forms can capture enquiries or feedback and send to shared mailboxes. This may be integrated with your property management system, but this requires scoping with your provider.

- Search tools enable your customers to search for content easily across the site to make finding information quick and easy.

- Configurable to use your brand fonts, colours and imagery with flexibility in content to ensure that the portal looks and feels bespoke.

- Delivered using your URLs for consistency and to remain 'on brand'

The content management system allows you to enable or disable content sections or limit sections to specific groups giving you control and enabling you to deliver content in phase or stages.

The Concierge Portal enables your front of house staff to:

- Manage visitors including being informed of expected visitors by occupants through the portal, checking visitors in and out, allocating visitor passes, viewing expected visitors for the day, automatic alerts to hosts when visitor arrives, automatic welcome email to guests and self-check-in via a tablet or PC.

- Manage temporary keys with features including assigning keys to a visiting contractor, scanning key fob barcodes for quick check-in / check-out, viewing overdue/checked-out keys, marking keys as lost

- Manage parcels including scanning parcels when they arrive, automatically alerting the recipient that their parcel has arrived and alerts for uncollected parcels.

- Manage bookable assets such as booking meeting rooms or parking spaces with the option to manage centrally or allow residents to book their own through their portal.

Onboarding

For the project to succeed, it is vital to identify and deliver to the right approach. Our approach maintains a focus on:

- Delivery on time and to deadlines
- Focus on quality and control at the core
- Good change control
- Managing stable and focused project teams
- Managing stakeholder expectations

Our onboarding approach to delivery reflects these aims with a focus on quickly delivering benefits and ensuring that the portal solution is instated as a dynamic and central system core to overall operations and services for our clients. We manage our projects using a combined Prince2 and Agile methodology.

Our development approach is Agile, using cross-functional teams to enable us to deliver our applications iteratively to enable you to start to see benefits at the earliest opportunity whilst maintaining quality and control. The Agile approach focuses on delivering work in sprints and this ensures that the project maintains momentum and aims to present customers with regular updates

through continuous delivery of working software. This approach means that we can present the top-level view and measurements and controls to ensure that we remain on track and deliver to agreed milestones and deadlines. Our controls mean that we know what has been delivered when and gives our customers the same assurance.

The core Engage Software as a Service cloud technology means that we deliver the initial phases quickly and our ongoing Agile approach means that we can regularly deliver enhancements and improvements.

We start with scoping, to ensure that the Engage software is configured to suit our customer's operations and services, defining any new integrations and configuration. Once the configuration and design are agreed, we implement and test before passing to your teams for user acceptance testing ahead of delivery.

Our understanding and experience in the sector means that we only involve your teams where we need to understand requirements to you and we can advise you on best practice where features or modules are new to you.

We recognise that some client specific deliverables may involve integration between partners, services and systems, these may incur additional scoping and integrations. These will be proposed following scoping according to our rate cards.

Offboarding

We aim to minimise the data held in Engage, preferring to share data using APIs with other systems rather than duplicating data within Engage. Any data within Engage itself is stored within SQL tables within the Umbraco content management system. At offboarding, any data which the client requires may be exported from SQL so that it may be queried or mapped and imported in any replacement systems as appropriate.

A standard export is provided as part of the routine offboarding process. Additional consultancy or reports may be provided at extra cost.

The Engage instance is then deleted with its associated data.

Support and Maintenance

We offer support by email or telephone. Online call logging may also be provided. Most clients prefer to offer user support for staff only in standard office hours, preferring to 'screen' requests from their users as issues raised by end users usually relate to the tenancy and associated services themselves rather than the portal. On this basis, this is our default level of support. Our systems are monitored and maintained on a 24x7x365 basis to ensure that the portal is available to your users when they need it.

All issues raised are logged in our ticketing system and reviewed and prioritised before being allocated to an engineer to manage to resolution. Once service is restored, root cause analysis may be required to identify underlying problems. Remedial work will be handled as projects, maintenance or bugs.

Where tickets are logged requesting training or other services, we will help within reason but will inform our primary contact if the request would be better met through training or where the request requires new development or configuration.

Support trends are reviewed regularly by management with a focus on continuous improvement. We review support provision with our clients, particularly relating to hours of support and channels of

support to ensure that we meet and exceed their expectations. A current focus is peer to peer collaboration with a focus on best practice.

MRI recognise the importance of regular operating system patching to ensure that customers systems are protected at all times. Critical and security updates are reviewed and released monthly as they are released by the vendor. However, in some instances Engage or vendors may release an update or patch outside of this cycle if there is a need to mitigate an immediate risk.

All are tracked and managed as changes following procedures in line with the ITIL framework. An internal QA phase is for any patching or changes to the system to ensure the software is in accordance with approved documentation.

Following core development sprints, a full set of regression tests is undertaken by Engage to ensure the solution meets specifications. These include:

- testing across a variety of browsers, mobile devices and operating systems
- automated testing
- accessibility testing
- environment testing.

Patches which will have an impact on the functionality of the site will also include a full User Acceptance Testing cycle, although it should be noted that such patches would be rare and such changes would usually be related to development projects.

We undertake new development in our development and test environments to mitigate risk and minimise disruption to users. Where any downtime is required for larger releases, we will liaise with you to ensure that scheduling is appropriate.

As Engage is delivered as a web application no installs will be required on individual PCs.

Training

We deliver up to five online Engage content management and administration training sessions and three online portal launch and awareness sessions as part of the core implementation. Further sessions or onsite training can be delivered at extra cost.

A content management and administration guide for your staff is provided as a PDF with additional help sheets and supporting information as part of onboarding.

Training is not usually required for end users other than that which you cover in the launch and awareness sessions. Engage can provide support for this which will be scoped and priced if required.

Pricing

Our monthly pricing is charged based on the size of your office development:

- Licensing the workers based at your offices to use Engage
- Hosting
- Maintenance and support
- Data storage
- Software releases and patches (for versions licensed)
- Monthly reporting
- Membership of the Engage user's forum

The price per unit is dependent on the square footage of your offices as detailed in the following matrix:

Portal Licensing (Software as a Service)

Sq. Ft	Rate per sq. ft PA
First 100,000	£0.15
Next 500,000	£0.08
Next 500,000	£0.04
Excess	£0.02

There is a minimum charge of £500 per month for licensing.

Onboarding

Description	Rate	Payment Terms
Scoping	£3,000	Prior to start of scoping
Core Implementation (one portal)	£5,000	On completion of scoping
Additional branded portals of the same build	£1,500	Prior to implementation
Integrations	Quoted following scoping	Agreed milestones
Customisation	Quoted following scoping	Agreed milestones

Offboarding

Description	Rate
Decommissioning	£3,000
Core Implementation	£5,000
Integrations	Quoted following scoping

All prices exclude VAT and expenses.