edison365

Tel: (+44) 1628 361895
Email: Hello@edison365.com
Address: Marlow International,
Parkway, SL7 1YL

Statement of Works: Expert Configuration

Detailed information on what's included with your Expert Configuration Services

1. Background

The Client have selected edison365 as the technology solution to support the realization of their business requirements. The Client have also selected edison365 to provide management consulting support for the initial implementation of the edison365 software.

This Statement of Work details the deliverables, scope, and conditions associated with the execution of these services.

The execution of the services listed below is dependent upon the subscription purchased by the Client. Elements of software functionality are restricted to different subscription levels.

edison365 will only provide services that cover the subscription procured by the Client, and will not execute any works for the Client that pertain to functionality not available at the subscription level procured.

The execution of the services contained within the Statement of Work are bound by the conditions set out within the Master Services Agreement.

2. In Scope

2.1 edison365 installation

If the Client have opted for a full cloud-hosted SaaS solution, no installation is required. As such, section 2.1 may be discounted as it is not relevant.

If the Client have not opted for a full cloud-hosted SaaS solution, installation is required. As such, edison365 will execute the works detailed within section 2.1.

2.1.1 Pre-requisites Call

edison365 will meet via Microsoft Teams with the Client IT team to establish that all necessary technical pre-requisites are in place within the organization, so that edison365 may begin the actual technical installation of edison365.

edison365 will confirm the required permissions within this call that the Client must have in place in order to successfully execute the installation.

2.1.2 Technical Installation Call

edison365 will meet via Microsoft Teams with the Client IT team and work directly with technical experts to complete installation.

It is incumbent upon the Client to ensure this session is attended by people who have the required permissions to complete the technical installation.

Failure to complete the installation of the software may lead to implementation delays.

2.2 Preparation

2.2.1 Kickoff Session

edison365 will meet with the Client via Microsoft Teams to address the high-level delivery plan, cover key requirements, and begin gathering the necessary information to begin implementation.

edison365 will also conduct a brief maturity assessment to baseline the requirements of the Client and to inform the rest of the implementation.

This will last no longer than one hour and will be delivered in a single meeting.

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2.2.2 Launch Planning Workshop

The launch planning session will be delivered via Microsoft Teams, and will provide recommendations for the Client, with the aim of increasing engagement, stimulating adoption, and ensuring that the Client gets users onto the software quickly and smoothly.
This will last no longer than one hour and will be delivered in a single meeting.

2.2.4 Discovery Session

edison365 will explore the Client requirements via Microsoft Teams prior to configuration of the solution. edison365 will work with the the Client core team to define key requirements, core functionality and implementation strategy. Information gathered within the discovery session will be used used to facilitate configuration of the edison365 platform. The Client must provide concise information on key requirements, which covers:

- Desired outcomes
- Desired process
  - Workflow
- Desired data capture
  - Fields
  - Tables
  - Forms
  - Cards
  - Templates
  - News
  - Calendars
  - Resources
    - Resources
    - Resource Fields
- Desired business analytics and intelligence
- Desired user permissions and access control

This will last no longer than two hours and will be delivered over a maximum of six meetings at two hours per meeting.
It is incumbent upon the Client core team to prepare for this session by defining desired outcomes, processes, data and reporting needs. Information on outcomes, processes, data and reporting requirements must be provided before or during the Discovery session.
Requirements documentation must be sent via email to the implementation consultant prior to or during the session. Acceptable formats include:

- .pdf
- .docx
- .xlsx
- .pptx
- .png
- .jpeg

Requirements may also be described verbally during the session, at which time the implementation consultant will document and record those requirements.
Failure by the Client to provide this information during the discovery session will result in delays to the implementation process.

2.3 Configuration

The edison365 implementation consultant, customer success consultant, and service desk team require access to the Client's tenant and instance to complete these works. It is incumbent upon the

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Client to provide access to edison365 prior to the configuration works commencing. Access must be provided to their edison365 accounts.
Access via separate service account, virtual machine, or other systems or processes which result in an increase to the amount of time required to complete the works are outside of the scope of works.

2.3.1 Initial Base Configuration

After the Discovery Session, edison365 will leverage information provided by the Client to begin configuration. edison365 will make changes exclusively to the edison365 software to address the Client requirements. The work will be done within the Client's tenant and instance of choice. Configuration of other systems, software or platforms is excluded from the scope of work.
This work will commence only once the discovery elements have concluded and the implementation consultant has been provided sufficient information to begin configuration. This work may take up to two weeks depending upon the complexity, scope and volume of configuration work as agreed during the discovery process.

2.3.2 Configuration

edison365 will meet with the Client via Microsoft Teams to present the configuration work for feedback and comment. edison365 will work with the Client team to evaluate the work done to date. The Client will provide feedback on the configuration work, and highlight any components that must be changed in order to address their requirements. Any changes not highlighted by the Client during these sessions will not be addressed by the implementation consultant.
This will last no longer than two hours.
The capabilities include:

- Challenges
- Ideas
- Business Case
- Projects

Configuration includes:

- Fields
- Tables
- Forms
- Cards
- Workflow
- Templates
- News
- Calendars
- Resources
  - Resources
  - Resource Fields

It is incumbent upon the Client to make decisions about process, requirements, configuration and needs outside of these sessions. The purpose of these sessions is strictly to focus on the technical implementation of the edison365 software.
Change documentation must be sent via email to the implementation consultant prior to or during the session. Acceptable formats include:

- .pdf
- .docx
- .xlsx
- .pptx
- .png
- .jpeg

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Changes may also be described verbally during the session, at which time the implementation consultant will document and record those changes.
edison365 will configure a **maximum of two templates** across all capabilities.

2.3.3 Reporting Discovery Session

edison365 will deliver reporting discovery sessions via Microsoft Teams, where the reporting requirements of the Client will be reviewed. edison365 will translate these requirements into actionable outputs, leading onto report development work.
The session will either focus on existing templates / wireframes that the Client wish to replicate, or if not known, existing edison365 best practice templates.
This will last no longer than two hours and will be delivered over a maximum of six meetings at two hours per meeting.
It is the responsibility of the Client to decide what information must be presented within the report, including:

- Source fields
- Source tables
- Source capability
- Transformations (how the data is modelled)
- Calculations (additional expressions to be built into the report)

It is incumbent upon the Client to discuss and agree reporting requirements internally prior to this session. Information on reporting requirements must be provided before or during the Reporting Discovery session.
Requirements documentation must be sent via email to the implementation consultant prior to or during the session. Acceptable formats include:

- .pbix
- .pdf
- .docx
- .xlsx
- .pptx
- .png
- .jpeg

Requirements may also be described verbally during the session, at which time the implementation consultant will document and record those requirements.
The edison365 implementation consultant, customer success consultant, and business intelligence consultant require access to the Client's tenant, instance and data to complete these works. It is incumbent upon the Client to provide access to edison365 prior to the configuration works commencing. Access must be provided to their edison365 accounts.
Access via separate service account, virtual machine, or other systems or processes which result in an increase to the amount of time required to complete the works are outside of the scope of works.

2.3.4 Reporting Development

edison365 will leverage information provided by the Client to begin developing the Power BI report. Throughout the development process, edison365 may meet with the Client to present progress, seek clarifications, or request more information. This also grants the Client the opportunity to evaluate, comment, and propose changes to the report.
A single .pbix file with a maximum of twenty worksheets shall be delivered to the Client following the development work.
This is timeboxed to **3 days**. If you require additional support, speak to your account manager about pricing and availability.
Reports will **always** be developed using the most recent version of Microsoft Power BI. Per the Power BI website; "Only the most recent version of Power BI Desktop is supported"

It is incumbent upon the Client to ensure they are using the most up to date software in order to use the reports created by edison365. You can check the current version here.

2.4 Education

2.4.1 Reporting Workshop

edison365 will deliver reporting workshops via Microsoft Teams following completion of the Reporting Development work.
This will last no longer than two hours and will be delivered over a maximum of two meetings at two hours per meeting.
In this workshop, edison365 will assist the Client in the publication and scheduled refresh of the report via the Power BI online service within the tenant of the Client.
edison365 will also provide basic guidance on the use of the Power BI report once it has been published to the Power BI online service. This includes;

- Navigation of the User Interface
- Interacting with visualizations
- Sharing the report
- Embedding the report within edison365
- Key insights from each report

It is incumbent upon the Client to ensure, prior to the session:

- There is a nominated person responsible for publishing and maintaining the report.
- This person is present for the Reporting Workshop.
- This person has access to the data sources queries within the Power BI report.
- This person has either;
    - Permission to create a new workspace within the Power BI online service, or;
    - Access to the target workspace where the report shall be published

2.4.2 Admin Training Session

edison365 will deliver feature-led training to the Client via Microsoft Teams on both the front and back end of the edison365 software. This includes the following:

- Front end
    - User interface
    - Creating a Challenge
    - Creating an Idea
    - Creating a Business Case
    - Creating a Project
    - Managing a Challenge
    - Managing an Idea
    - Managing a Business Case
    - Managing a Project
    - Interacting with news
    - Interacting with cards
    - Engaging with other users (likes, comments, votes)
- Back end
    - How to create, edit and delete fields
        - Text
        - Rich Text
        - Number
        - Image
        - Choice
        - Multi-level choice
        - Tags (multi select)

        - Multi-level Tags (multi select)
        - Date
        - Switch
        - People Picker
        - URL
        - Calculated
        - email
        - Phone
        - Location
    - How to create, edit and delete tables
        - Standard
        - Periodic (Gregorian)
        - Periodic (Fiscal)
        - Calculated
    - How to create, edit and delete forms
    - How to create, edit and delete templates
    - How to create, edit and delete workflows
        - Create Stages
        - Configurable forms per stage
        - Unique forms per stage
        - Configurable cards per stage
        - Conditional Branching
        - Assign Reviewers
        - Conduct Triage
        - Automatic flows
        - Assign Review Tasks/checklists
        - Workflow Actions & notifications
        - Create Power Automate actions
    - How to create, edit and delete triage metrics
    - How to update the design
        - Logo
        - Theme
        - News Stories
        - Forms
        - Cards
        - Views
        - Homepage

This will last no longer than two hours and will be delivered over a maximum of four meetings at two hours per meeting.
This is timeboxed to **1 day**. If you require additional support, speak to your account manager about pricing and availability.

3 Out of Scope

The items listed below are specifically excluded from the scope of this engagement. Should the Client wish to include these in the defined scope following the initial agreement and commencements of the works, this will be raised as a formal Change Request (CR) via the Account Manager.
edison365 will manage each the Client change request, and where necessary propose additional costs arising from the variation.

- Integration to other systems
- Timesheet / individual progress collection
- Custom software development of the edison365 platform

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- The installation of additional instances
- Data migration from, or to, other systems
- Microsoft Power BI training
- Publication and distribution of Microsoft Power BI reports
- Hosting of Microsoft Power BI reports
- Reporting developing using any tool other than Microsoft Power BI
- Connection to external (non-edison365) data sources for report development
- Strategic Innovation Management training
- Project Planning training
- Project Management training
- End user software training

3.1 Changes to Scope

Any changes to scope, deliverables or budget will be subject to a standard Change Request (CR) process. Each CR will be documented in a change log. The impact, risk, time and required cost of each CR will be estimated by edison365. This will be communicated to the Client via email.
Both edison365 and the Client must agree and accept the CR prior to the works commencing. Work on any CR will not begin until it is formally accepted in writing by the Client.