

Zellis Application Management Service Description Guide.

Autumn 2024 edition



Contents

Document Control..... 2

1 Introduction..... 3

 1.1 Scope 3

 1.2 Document content 3

 1.3 Updates to this Guide..... 3

 1.4 Service Descriptions..... 3

 1.5 SDG use and navigation 4

2 Application Management Services..... 5

 2.1 Application Security Management 5

 2.2 Incident and Alert Management..... 7

 2.3 Upgrade and Release Management..... 8

 2.4 System Health..... 9

 2.5 Configuration and Support 10

 2.6 Hierarchy Maintenance 11

 2.7 System Evaluation 12

3 AMS Governance and KPIs..... 14

 3.1 KPIs..... 14

Document Control

Information	
Document Id	AMS SDG
Document Owner	Zellis UK Ltd
Issue in	November 2024
File Name	Zellis Application Management Service Description – v2.0

1 Introduction

1.1 Scope

This Service Description Guide describes the Application Management Service available to Zellis HCM AIR, Zellis HCM Cloud and Private Cloud Customers. For simplicity, unless a service is differentiated, the application set is referred to generically here as HCM Cloud.

Your **Customer Agreement** specifies which Services you have purchased, and additional details of our Services are included in the process maps that we provide during Service implementation.

In this Service Description Guide “you” means the Customer, “we” means Zellis. “your” and “our” should be read accordingly.

1.2 Document content

The Service Description guide comprises the following sections:

- Application Security Management
- Incident and Alert Management
- Upgrade and Release Management
- System Health
- Configuration and Support
- Hierarchy Maintenance
- System Evaluation

For each area of service, standard activities that are included in the charges are listed. Within each table we set out our responsibilities and your responsibilities, and any assumptions and exclusions that apply.

1.3 Updates to this Guide

We may amend or update this Service Description Guide from time to time including (without limitation) to reflect ongoing service enhancements. Changes will be made available to all customers via the link in the Customer Agreement and notified to registered users through the Customer Help Centre. Each update will replace any previous versions. In the event of any conflict between this paragraph and the Terms and Conditions, this paragraph shall prevail to the extent of such conflict.

1.4 Service Descriptions

Each service is defined using the following standard format:

Ref: XXnn	Standard / Optional	Name
Our responsibility:		<i>Narrative describing Zellis' obligations</i>
Your responsibility:		<i>Narrative describing Customer's obligations</i>
Assumptions:		<i>Narrative describing applicable assumptions</i>
Exclusions:		<i>Narrative describing applicable exclusions</i>

Where:

- **Ref:XXnn** is the formal reference for the service comprising letters and numbers.
- **Standard / Optional** defines whether a service is standard or may be procured as an optional extra.
- **Name** is the basic description of the service.

Note that customer-specific processes are clarified and documented in Detailed Working Instructions (DWIs) at implementation after which they may be updated via Change Control processes.

1.5 SDG use and navigation

Only those Service options of the SDG set out as being applicable in the **Customer Agreement** apply with reference to Services procured from Zellis.

2 Application Management Services

2.1 Application Security Management

Incorporating:

- Security profile maintenance.
- User maintenance incorporating monthly access control reviews.
- Password reset processing where single sign-on (SSO) and multifactor authentication (MFA) is not configured.

Ref: AM1	Standard	Access Control
Our responsibility:		Undertake monthly checks on user access. Deactivating access where the user has not accessed within the last 30 days.
Your responsibility:		Check and respond to the monthly report provided for your colleague's access rights. Notify Zellis of any required changes including leavers.
Assumptions:		Standard report output. Report to be provided within five working days of the end of each calendar month.
Exclusions:		Bespoke requirements.

Ref: AM2	Standard	Request Management - Profiles
Our responsibility:		Set up new security profiles as required and maintain any changes to existing profiles.
Your responsibility:		Provide detailed requirements.
Assumptions:		Set up to be undertaken within five working days.
Exclusions:		External systems.

Ref: AM3	Standard	Request Management - Users
Our responsibility:		Set up new operators as required and maintain any changes to existing users.
Your responsibility:		Provide authorised access request.
Assumptions:		Set up to be undertaken within 24 hours of request.
Exclusions:		External systems.

Ref: AM4	Standard	Password Resets for Users
Our responsibility:		Perform password resets for operators of both HCM Cloud and MyView, and remove any systems locks.
Your responsibility:		Provide users with self-service instructions.
Assumptions:		Response within 24 hours.
Exclusions:		External systems.

2.2 Incident and Alert Management

Incorporating:

- Proactive management of technical incidents.
- Problem and defect investigation and management.
- Service communication and management of maintenance windows.

Ref: AM5	Standard	Support for Incidents and Defects
Our responsibility:		Problem triage prior to case creation. Advice and guidance on system usage and resolution.
Your responsibility:		HCM Cloud users are fully trained in the usage of the System.
Assumptions:		Technical incident logged by you.

Ref: AM6	Standard	Incident Management
Our responsibility:		Pursuit of cases logged by engaging with Zellis support teams to monitor cases and update you on status and progress.
Your responsibility:		Provide full backing data of incident.
Assumptions:		Technical incident logged by you.

Ref: AM7	Standard	Problem Management
Our responsibility:		Evaluate HCM Cloud known issues and communicate impact and workarounds with you.
Your responsibility:		Cascade internally and / or provide contacts.
Assumptions:		You test workarounds and associated fixes when made available.

Ref: AM8	Standard	Service Communications
Our responsibility:		Communicate to you any upcoming scheduled / non-scheduled downtime, or major incidents and support with planning and preparation.
Your responsibility:		Cascade internally and / or provide contacts.
Assumptions:		No change to scheduled dates.
Exclusions:		Potential to change however Zellis will use reasonable endeavours to reduce impact.

2.3 Upgrade and Release Management

Incorporating:

- Product and System roadmap reviewed proactively to identify future benefit opportunities.
- Legislative and innovation upgrades planned to incorporate regression testing and consider use of new product facilities.
- System health maintained, including deployment of patches.

Ref: AM9	Standard	Upgrade / Patch Management
Our responsibility:		Evaluate new HCM Cloud functionality including legislative changes and resolved problems and advise you on efficiency savings and benefits.
Your responsibility:		Planning and release scheduling to enable legislative compliance through support of upgrades.
Assumptions:		All major upgrades applied.

Ref: AM10	Standard	Knowledge Updates & Future Roadmap Discussions
Our responsibility:		Discuss product roadmap and other system related changes quarterly.
Your responsibility:		To consider beta testing options.

Ref: AM11	Standard	Control of Databases
Our responsibility:		Monitor and control HCM Cloud versions.
Your responsibility:		Agreement to usage.
Assumptions:		Databases to be on latest version unless mutually agreed.

Ref: AM12	Standard	System Release Testing
Our responsibility:		Testing of standard system functionality after HCM Cloud upgrade.
Your responsibility:		Additional User Acceptance testing of upgrade changes, including payroll processing tests.
Exclusions		Bespoke items.

2.4 System Health

Incorporating:

- Data management according to your retention policies.
- System housekeeping to maintain performance.
- Configuration of task scheduling and automation of core functionality to enhance system and process efficiency.
- Platform management, risk reduction activities, and systems reporting.

Ref: AM13	Standard	System Health Review
Our responsibility:		Undertake a health check assessment of your system, and review on an annual basis to keep your HCM Cloud solution up to date.
Your responsibility:		Specify retention policy details.
Exclusions		Non authorised deletion.

Ref: AM14	Standard	Data Retention
Our responsibility:		Assist with data management and deletion in line with agreed retention policy.
Your responsibility:		Specify retention policy details.
Exclusions		Non authorised deletion.

Ref: AM15	Standard	System Housekeeping
Our responsibility:		Regularly run housekeeping routines so that HCM Cloud runs at optimal performance.
Your responsibility:		Agree scheduled housekeeping activities in line with retention policy details.
Exclusions		Non authorised deletion.

Ref: AM16	Standard	Task Scheduling and Automation
Our responsibility:		Automate tasks where possible using the task scheduler and offline processing, enabling good practise optimisation.
Your responsibility:		Consider and support deployment of functionality.

Ref: AM17	Standard	Core Functionality
Our responsibility:		Support in the configuration of the health check core functionality.
Your responsibility:		Engage with the improvement agenda and support deployment of functionality.
Exclusions		Average holiday pay and National Minimum Wage configuration not in scope.

2.5 Configuration and Support

Incorporating:

- Small change capacity to support the underlying dynamic nature of your business needs.
- Creation and maintenance of ad-hoc reporting.
- Hands on support from payroll and HCM Cloud experts.
- Support for cyclical change activities e.g. year-end, AE re-enrolment, and salary reviews.

Ref: AM18	Standard	Change Control – Assessment
Our responsibility:		Impact / risk assessment of change requests submitted by you. Engagement with relevant Zellis teams where pricing, planning and document control is required.
Your responsibility:		To provide clear requirements and supporting data if required.
Assumptions:		Small change.
Exclusions		Larger changes and projects.

Ref: AM19	Standard	Support for Minor Application Changes
Our responsibility:		Support with the creation of but not limited to pay elements, control groups, cost codes, service conditions, post, grades, monetary and spinal tables, locations, and user defined fields.
Your responsibility:		Provide detailed requirements.
Assumptions:		Price inclusive subject to fair usage e.g. typical annual demand being: 15 new pay elements, two new control groups, 25 cost code changes, five service condition changes, 100 post creations, five spinal tables, 10 grades, 25 locations, five standard letters, five new MyForms and five user defined fields or screens.
Exclusions		Change or creation of reports linked to new pay elements. The transfer or creation of employee records from and to new control groups, service conditions, locations, spinal tables and grades.

Ref: AM20	Standard	Processing Guidance
Our responsibility:		Hands on support from payroll and HCM Cloud experts, providing advice and guidance on payroll administration and processing.
Your responsibility:		Provide detailed requirements.
Exclusions:		Configuration of HCM Cloud functionality and reporting.

Ref: AM21	Standard	Annual HCM Cloud Changes
Our responsibility:		Support with the production of year-end, P11D and payroll benefits, gender pay reporting, re-enrolment, increments, and salary update processes.
Your responsibility:		Provide detailed requirements.
Assumptions:		HCM Cloud functionality already configured, tested and signed off by you.
Exclusions:		Configuration of HCM Cloud functionality and reporting.

Ref: AM22	Standard	Simple Reporting
Our responsibility:		Provision of simple ResourceLink Reporting Service reports using ad-hoc views.
Your responsibility:		Provide report requirements.
Assumptions:		Maximum 20 listing reports using standard data fields.
Exclusions:		Complex reporting e.g. PowerBI or crosstab reports, and third-party reports. Changes to existing bespoke reports.

2.6 Hierarchy Maintenance

Incorporating:

- Maintenance of the payroll and HR hierarchy held within HCM Cloud.
- New post and structure unit creation and post-to-post maintenance.

Ref: AM23	Standard	Maintenance of Payroll and HR Hierarchy
Our responsibility:		Manage individual and bulk changes to the HR and payroll hierarchy.
Your responsibility:		To provide supporting data.
Assumptions:		Limited to maintenance activities. Price inclusive subject to fair usage. E.g. typical annual demand: Service limited to 50 changes.
Exclusions:		Major hierarchy changes and restructures.

Ref: AM24	Standard	New Post and Structure Unit Creation
Our responsibility:		Creation of new structure units / movement of units and posts within the hierarchy.
Your responsibility:		Provision of detailed requirements.
Assumptions:		Price inclusive subject to fair usage. E.g. typical annual demand: Service limited to 100 post creations / 50 new structure units.

Ref: AM25	Standard	Maintenance of Posts
Our responsibility:		Process individual or bulk changes to existing background posts.
Your responsibility:		Provision of detailed requirements.
Assumptions:		Price inclusive subject to fair usage. E.g. typical annual demand: Service limited to 100 post changes.

Ref: AM26	Standard	Post to Post Maintenance
Our responsibility:		Maintaining individual and bulk post reporting line changes.
Your responsibility:		Provision of detailed requirements.
Assumptions:		Price inclusive subject to fair usage. E.g. typical annual demand: Service limited to 50 changes.

2.7 System Evaluation

Incorporating:

- Ongoing monitoring of system health to maintain efficient and effective operation.

Ref: AM27	Standard	Review your top HCM Cloud issues
Our responsibility:		Discuss priority issues in the organisation and work with you to identify and configure solutions.
Your responsibility:		Provision of supporting data.
Exclusions:		Peripheral systems of data feeds. Larger changes and projects.

Ref: AM28	Standard	Review System Functionality
Our responsibility:		Review the system functionality in use, advising whether this is being used effectively and suggest / recommend improvements.
Your responsibility:		Consider options for core functionality adoption.

Ref: AM29	Standard	Evaluate System Functionality
Our responsibility:		Provide advice and guidance and give options for solutions where needed.
Your responsibility:		Provision of supporting data.

3 AMS Governance and KPIs

AMS Service governance will take place as part of overall service governance processes (whether SaaS or Managed Service) in liaison with your Customer Success Manager.

3.1 KPIs

Metric	Target
<p>Email Cases Response Rate</p> <p>The proportion of Case Management Tool enquiry tickets received per month by the AMS Team responded to within one Working Day of receipt. "Responded" includes an indication of the actions being taken and expected resolution timeframes.</p>	95%
<p>SLA reporting</p> <p>Quarterly SLA Reporting on call status.</p>	95%
<p>Application management</p> <p>Support for minor application changes within five days of request.</p>	90%
<p>Ad-hoc reporting</p> <p>Support for Ad-hoc reports within five days of request.</p>	90%

**For further information
please visit zellis.com**

A4190/MCB29 November 2024
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