



## Education Finance Services Catalogue

At Access we pride ourselves on the depth and breadth of skills across our 400 certified professional services employees. These Consultants, Programme Managers, Project Managers, Trainers and Solution Architects are here to provide you with the industry expertise and product best practices that help you deploy, adopt, operate and integrate our market leading software applications. Either on-premise, or in the Cloud. Our Professional Services teams help hundreds of customers like you, every week, to improve their productivity, increase their efficiency and ultimately provide them with the freedom to do more.

### Day Rate Service options

Service	Description	Customer Outcome	Pricing
<b>1 Day(s) Consultancy</b>	Up to 6.5 hours consultancy per day, delivery methods of remote or on-site	Desired outcome agreed by client and consultant ahead of the scheduled day.	per day
<b>Remote Consultancy</b>	Up to 3 hours remote consultancy.	Desired outcome agreed by client and consultant ahead of the scheduled day.	per day
<b>Project Management</b>	Time to manage the timings of the project to provide an update on progress that has been made and ensure everything is on track.	Professional Project management providing clients to support they require to implement their projects successfully.	per day

### Implementation Services

Service	Description	Customer Outcome	Pricing
<b>FlightPath A for Education Finance</b>	Implementation of Access Education Finance to a single academy. Simplifying financial accounting in schools, academies and academy trusts, providing an accountancy package you expect, but better. This implementation can include the adoption of the DfE standard chart of accounts. This fixed price, low-risk implementation package standardises your implementation journey based on our best practices and are designed to deliver timely value to you and your colleagues. For more details see <a href="http://www.theaccessgroup.com/flightpath-overviews/">www.theaccessgroup.com/flightpath-overviews/</a>	Implementation of Access Education Finance including: All modules contained within the system, tailored to the specific setup of your organisation. Key services delivered include; remote system design and scoping; migration of customer, supplier and chart of accounts information; training for end users on all system functions and handover to our dedicated support team.	Fixed Price
<b>FlightPath B for Education Finance</b>	Implementation of Access Education Finance to a Multi academy Trust. Simplifying financial accounting in schools, academies and academy trusts, providing an accountancy package you expect, but better. The implementation can include the adoption of the DfE standard chart of accounts. This fixed price, low-risk implementation package standardises your implementation journey based on our best practices and are designed to deliver timely value to you and your colleagues. For more details see <a href="http://www.theaccessgroup.com/flightpath-overviews/">www.theaccessgroup.com/flightpath-overviews/</a>	Implementation of Access Education Finance including: All modules contained within the system including the optional to use central bank functionality, tailored to the specific setup of your multi academy trust. Key services delivered include; remote system design and scoping; migration of customer, supplier and chart of accounts information; training for end users on all system functions and handover to our dedicated support team.	Fixed Price
<b>Implementation of Education Budgets</b>	6.5 hours of onsite training on Access Education Budgets. Training will include full system setup and complete end to end user training for up to 8 people.	By the end of the session all users will have a solid grounding in the practical use of Access Education Budgets and will have started the process of building a school/academy budgets in the system. Users will have a good working knowledge of advanced features, such as; 3rd party links, payroll reconciliation and ledger group reporting.	Per Day
<b>System Scoping / Data Setup</b>	This service ensures that when an additional site joins a Multi Academy Trust, the system is setup and configured for use by the new school/academy as part of the existing trust setup.	On completion of this service, the MAT will have full access to a new licence within their existing environment, that is pre configured with customer/supplier/CoFA data to allow for use by the new school.	Per Day

### Advisory and Adoption Services

Service	Description	Customer Outcome	Pricing
<b>User adoption review</b>	Let us do an on-site user adoption review to ensure your employees are getting the best outcomes from your Access Education Product investments.	An action focused report showing your adoption maturity of the solution, any quick resolutions and longer recommendation resolutions or actions to increase your ROI (Return on Investment).	Fixed Price
<b>System health check</b>	Review current system setup, adoption of profiles, review of transactions across the MAT to ensure best practice and highlight any areas for suggested improvement.	Ensures you are getting the best performance, using best practices and are using the software to its full potential.	Fixed Price
<b>Budget Workshops</b>	A half day group based training session, for up to 10 delegates. Providing a hands on opportunity to use Education Budgets with an experienced consultant providing support/training.	By the end of this workshop delegates will have had the opportunity to use live data within their software and apply this within their own school/academy. Covering day to day operations as well as looking at the most recent updates to the software and how they benefit the end user.	Per Delegate
<b>DfE Data Migration Service</b>	On the 14th May 2019, the DfE announced the launch of a new academies chart of accounts as the first step to automated financial reporting. The new academies chart of accounts is the DfE's standard for financial data that underpins the academies accounts return and budget forecast returns. The DfE recommend adopting the new chart of accounts for use from September 2019; although adopting the new structure is voluntary.	On completion of this service, users will have been moved from their previous chart of accounts to the new DfE recommended chart of accounts, with a revised mapping structure across the MAT/SAT.	Per Day

### Additional Services

Service	Description	Customer Outcome	Pricing
<b>Year End Workshops</b>	A half day group based training session, for up to 10 delegates. Providing a hands on opportunity to use Access Fiance with an experienced consultant providing information and an opportunity to ask any questions relating to your organisation.	By the end of this workshop delegates will have had the knowledge to perform year end in their software and apply this within their own school/academy. Covering year end tasks and reporting mechanisms to the relevant stakeholders.	Per Delegate
<b>New User Training (Finance)</b>	A full day session with new users or bespoke training to the users role, this training will ensure that the user can perform operational tasks and reports.	By the end of this workshop delegates will have had the knowledge to perform year end in their software and apply this within their own school/academy. Covering year end tasks and reporting mechanisms to the relevant stakeholders.	1 day
<b>New User Training (Budgets)</b>	A half day session providing a hands on opportunity to use Education Budgets with an experienced consultant providing support/training.	By the end of the training delegates will have had the opportunity to use live data within their software and apply this within their own school/academy. Covering day to day operations as well as looking at the most recent updates to the software and how they benefit the end user.	1/2 day

<b>Budget Holders (Procurement Process)</b>	Demonstrate how the Workspace administrator adds new users to procure within Access Finance and use workspace to authorise transactions as well as budget monitoring.	At the end of the session budget holders will have access to the live system to create purchase requisitions, view transactions they are responsible for and incorporate their own budget monitoring reports	Per Delegate
<b>Workspace and Data Analytics</b>	A two hour webinar for individuals or groups on the use and benefits of Access Workspace. How to configure Workspace to fit with your organisations needs.	By the end of the training delegates will be able to use Workspace for Collaboration & Communication, use of Analytics Dashboards (Reports) for their Access Products and will know how to get immediate access to your financial and budgeting information.	2 hours
<b>Basics of Accounting Training</b>	A half day group based training session. Providing training on understanding the Basics of Accounting for non-finance users.	By the end of the training the delegates will have a better understanding of financial statements, e.g. Trial Balance, Income & Expenditure, Balance Sheet and Cashflow Forecasts. Users will have a better understanding of double entry bookkeeping and how to account for income & expenditure and assets & liabilities.	1/2 day

## Mission Critical Services

Service	Description	Customer Outcome	Pricing
<b>Not applicable</b>			

## Development and Integration Services

Service	Description	Customer Outcome	Pricing
<b>Not applicable</b>			