AMS-HOPS Package for Local Authority / PTA / Other Public Sector Members

2018-19

SAM→

Contents

Background

Smart Applications Management (SAM) is the trading name of South West Smart Applications Ltd, incorporated and registered in England and Wales (Company no 7205882, VAT no 133366035), whose registered office is at 14 High Cross, Truro, Cornwall TR1 2AJ ("SAM").
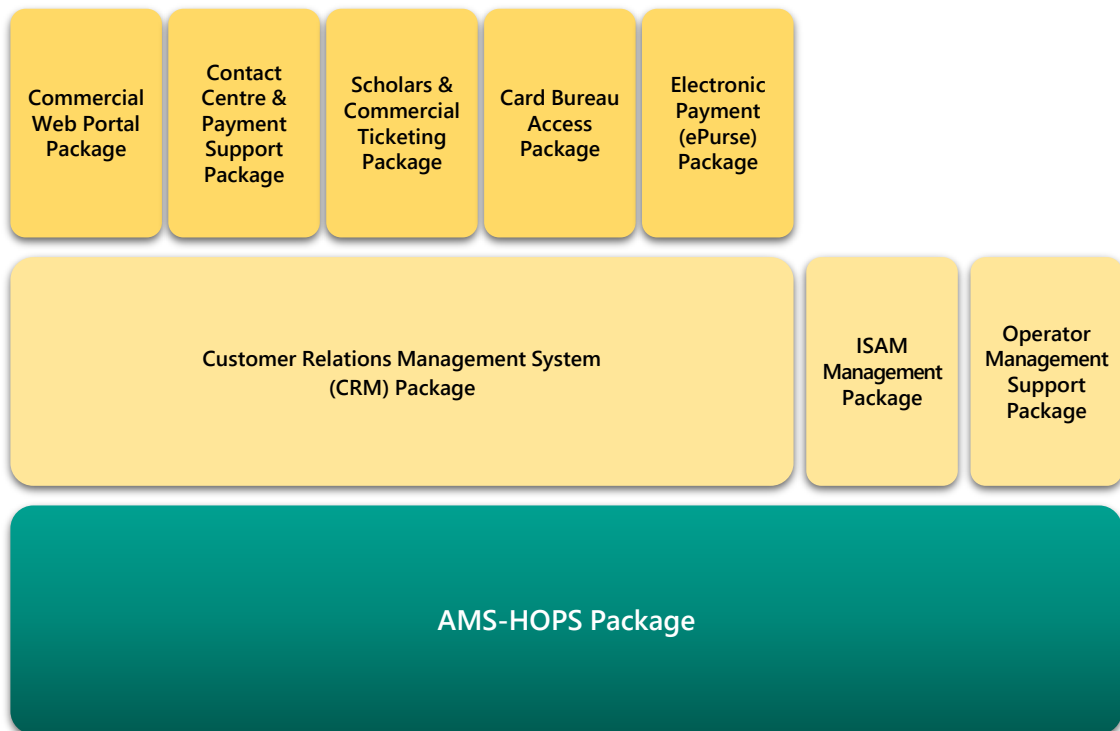
In 2016 SAM held a number of internal workshops and meetings with its Members, to develop and refine a series of customer specific support services (Packages) for the period April 2017 – March 2023.

The SAM Managed Service

The SAM Managed Service provides support via a series of individual support Packages which can be combined to provide a complete end-to-end managed service for smart and integrated ticketing, which best meets the needs of an individual SAM Member. Each Package is designed to support a specific Scheme requirement and has been developed by SAM using the experience gained through supporting its Members over the last 8 years.

The diagram below shows how the Managed Service is built upwards from the AMS-HOPS Package which forms the base of most Managed Service solutions. Members can then choose to build on the AMS-HOPS Package and add, for example, the CRM Package, or assist SME Operators through the addition of the Operator Management Support Package.

The SAM Managed Service has been designed to be flexible, to allow Members to add Packages as their Scheme grows and their requirements change.

Commercial Web Portal Package	Contact Centre & Payment Support Package	Scholars & Commercial Ticketing Package	Card Bureau Access Package	Electronic Payment (ePurse) Package		
Customer Relations Management System (CRM) Package					ISAM Management Package	Operator Management Support Package
AMS-HOPS Package						

AMS-HOPS Package for: | Local Authority / PTA's / Other Public Sector Members

Introduction

The AMS-HOPS Package forms the foundation of SAM's Managed Service, in providing a fully managed, dependable back office AMS-HOPS system able to support a wide range of Smart Ticketing Schemes from basic Entitlement Schemes to the most complex of Commercial Schemes.

The AMS-HOPS underpins any ITSO Smart Ticketing Scheme and manages all the communication and security functions (including Hotlisting and Actionlisting) as well as controlling and updating the Schemes ISAM estate. SAMs core AMS-HOPS Package supports Members with a fully managed AMS-HOPS service.

As a SAM Member, when purchasing a Managed Service package from us, you are not just getting access to the software from the Supplier, but the support of a team dedicated to ensuring you can get the best out of your integrated smart system – however large or small that may be.

Services Provided within the AMS-HOPS Package

The services provided by the SAM Managed Service under the AMS-HOPS Package are based upon the provision of a secure, unique AMS-HOPS partition. It is delivered to the required technical specification and functionality defined within the National Procurement Framework (page 15), inclusive of all Service Levels. Key attributes and services of the AMS-HOPS Package provided by SAM for its Members include:

1. Actionlist Management
2. Perso & HSAM Management
3. Hotlist Management
4. Standard AMS-HOPS Performance Monitoring
5. Supplier Liaison & Management
6. SAM Member AMS-HOPS Support
7. AMS-HOPS Package Supplier Service Levels (SLAs)
8. Enhanced Reporting via SAM's own Data Visualisation Service (DVS)
9. ITSO Support

Services Provided within the AMS-HOPS Package

1. Actionlist Management

- Local **apportionment of dedicated ISAM space** to optimise Actionlisting
- **Daily (M/F) check** of the Actionlist activity
- Produce weekly reports per operator and area
- **Troubleshoot** ISAM issues
- Attend ITSO meetings about Actionlisting
- Respond to ITSO consultations about Actionlisting
- Provide **customer support** for Actionlist issues
- **Actionlist testing**
- Produce Actionlist strategies

2. Perso & HSAM Management

- Define and oversee Perso & HSAM profiling
- Development and management of Perso ISAM Profiles
- Quality Assurance of Perso ISAM profile per batch
- Troubleshoot HSAM issues
- Liaison with Suppliers to ensure HSAMs do not expire
- Regular checking to ensure Perso ISAMs do not expire
- Management of Perso updates & keys (inc rollover)
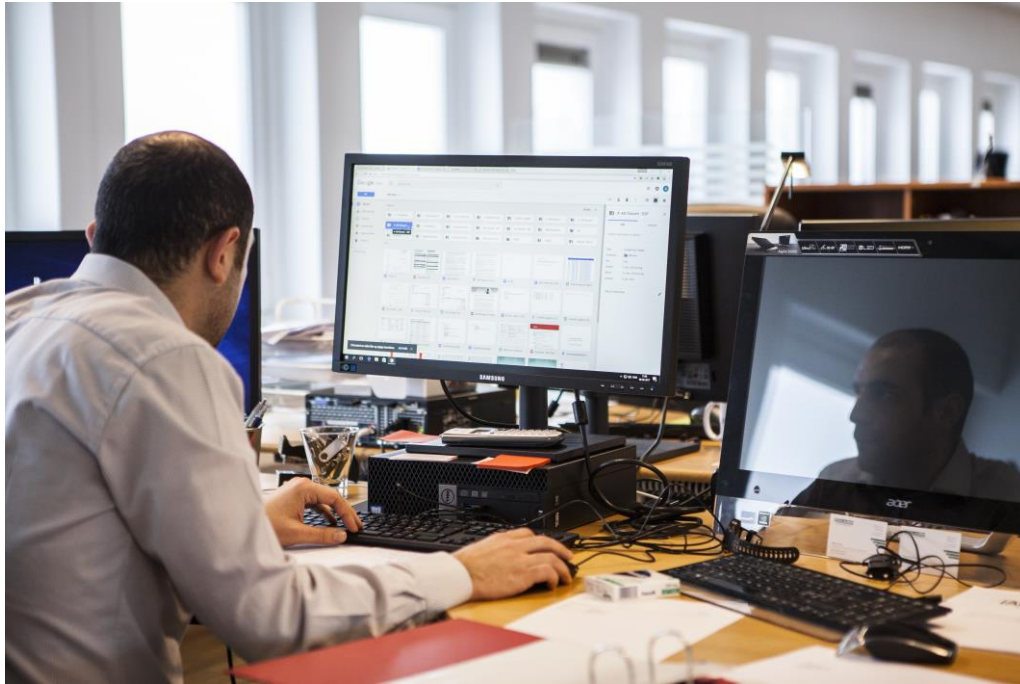- Development of and support for SuperPerso ISAMs

3. Hotlist Management

- Monitor apportionment of dedicated ISAM space to optimise Hotlisting
- **Daily (M/F) checking of the Hotlist activity**
- Daily (M/F) Monitoring of Active and Master lists
- Production and distribution of weekly reports per Operator and Area for Members
- **Produce and maintain Hotlisting toolkit** for Members
- Produce for Members individual ISAM Hotlist apportionment strategies
- Support Members in developing a **Hotlist Strategy in line with BSOG Conditions**
- Represent Members at ITSO meetings about Hotlisting
- Respond to ITSO consultations about Hotlisting
- Advise ITSO and DfT on National Hotlisting guidance
- Support Members to **produce templates of Hotlisting marketing** material including posters, driver guides, amnesty leaflets and PR guidance
- Provide **FREEPOST service for returned/Hotlisted commercial cards**
- Assist other areas on 'the SAM approach' as appropriate
- Inform Members where Operator is failing to meet requirements
- Support Manual Hotlist Processing, including converting email requests into Hotlists as required
- Raise Hotlist messages within the AMS-HOPS as required

4. Standard AMS-HOPS Performance Monitoring

- Performing **daily (M/F) checks** within the AMS-HOPS to ensure systems are operating correctly
- **Generating regular reports** within the AMS-HOPS to monitor overall performance
- Liaising with the Supplier where anomalies are identified & reporting anomalies via the Service Desk
- Reporting any **identified risks or threats** to Business As Usual (BAU) to Members
- Testing new reports via the SAM integrated User Acceptance Testing (UAT) platform before release to live
- **Monitoring of data exports** to external systems, inc. checking and validating data exports

5. Supplier Liaison and Management

- Assessment of **performance against SLAs**
- Regular Account meetings with key Suppliers
- Registering identified issues with the Service Desk
- **Managing issues** through regular calls
- Broker support between Supplier and Member as required
- Project escalation and **solution standardisation** as required
- Identification of new opportunities
- **UAT testing** inc advice and guidance

6. SAM Member AMS-HOPS Support

- Provide **0900-1700 M/F phone support** for Members
- Provide email support for Members
- Provide **access to AMS-HOPS Phone Service Desk** 0900-1700 M/F
- Provide access to AMS-HOPS Email Service Desk
- Access Member's AMS-HOPS partitions to resolve queries as required
- Log issues with Supplier(s) as required
- Work with wider supply chain to identify the source of any issues
- **Oversee management** of resolving any identified issue

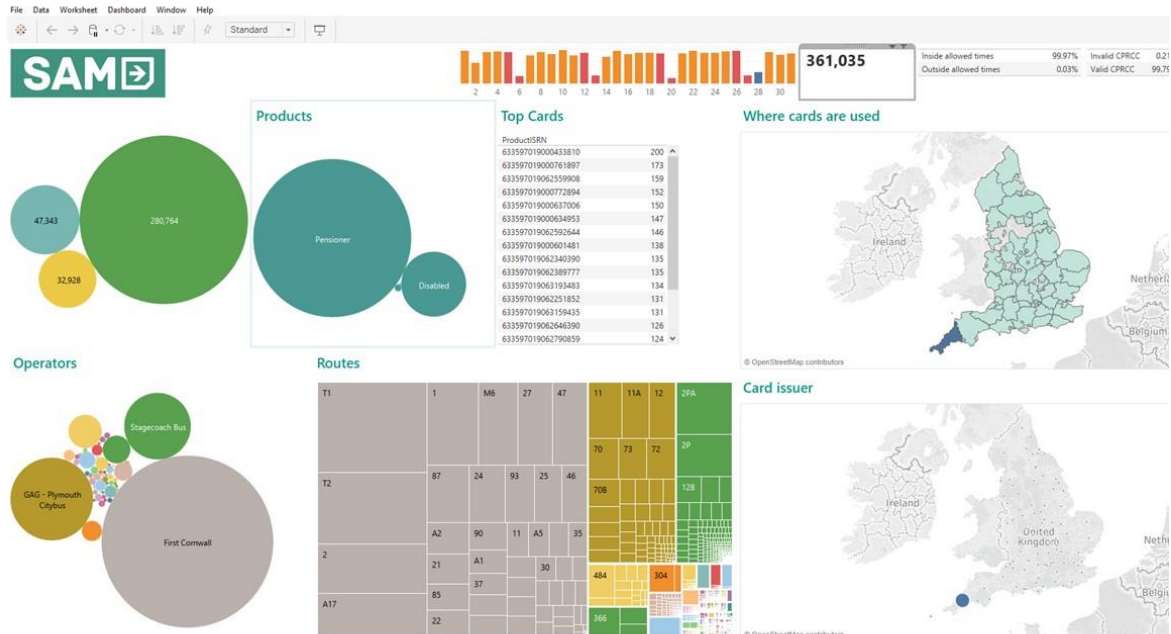# 7. AMS-HOPS Package Supplier Service Levels (SLA's)

- The Core System SLA requirements of the AMS-HOPS Package provided to SAM by the Supplier for the Managed Service Package is based on time availability, monitored over a <u>monthly</u> period, and includes:

99.5% = Level of AMS-HOPS availability to the Customer

99.5% = Level of automatic processing, generation and availability of Class 2 messages for the process of master, active and distributed hotlisting

99.5% = Level of automatic processing, generation and availability of action lists

99.5% = Level of Journey Transactions, inc Ack/Nak messages successfully processed within 1 hour of being received into the AMS-HOPS

99.5% = Level of time a master asset register is provided during Support Hours detailing all ISAMs supported by the AMS-HOPS and the profile of that ISAM

99.5% = Level of ISAM messaging successfully managed to ensure updates received from the ISMS or key updates/ rollovers or keep alive messages are made available

AMS-HOPS Service Levels With Supplier

Full details of the Service Level Agreement for the AMS-HOPS is available within the Members Area of the SAM Website

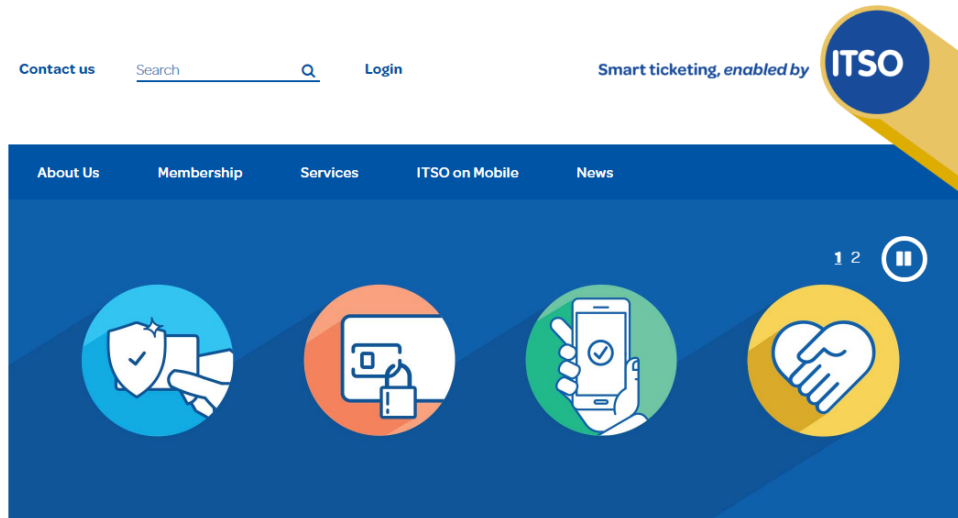# 8. Enhanced Reporting via SAM's own Data Visualisation Service (DVS)

The Data Visualisation Service (DVS) is SAM's own **bespoke reporting platform** for Members, and is provided at no additional cost to all AMS-HOPS Package customers. DVS enables a secure platform for:

- **Monitoring and verifying** import data
- BAU review of product performance
- Production of Member specific reports – weekly, monthly and annual usage
- **Bespoke products report** service (available from SAM via email, or phone)
- Onsite DVS training where required
- Ability to undertake 'What If' analysis and drill down to transaction level
- Bespoke data support to police and other agencies where needed
- **Fraud and similar** trend identification

To ensure as many Members are able to benefit from DVS, it has been developed to run using Tableau, a freely available data presentation platform.

9. ITSO Support

The national smart ticketing standard

ITSO has been making travelling on public transport throughout the UK seamless and easier by enabling smart ticketing technology since 2002. Throughout our history, we have been where the opportunities are, supporting our members to grow smart ticketing and realise its potential.

We recognise that people want to buy travel the same way that they would buy other goods and services, for example on a mobile phone. Our vision is to provide better journeys for everyone.

- Production of **ITSO User Guide** for Members
- National engagement with ITSO
- Representation on Member's behalf at ITSO Working Groups
- **Engagement with ITSO on** specification issues
- Application of relevant corrigendum with Suppliers
- Bulk purchasing of ITSO ISAM services to reduce costs
- Support Members with ITSO news story development as required
- **Central management of core ITSO requirements** (for example TKR)
- Management of ITSO OIDs, products, etc (Serena) as required
- Responding to ITSO requests on behalf of Members (surveys, etc)
- Developing **funding applications with ITSO**
- Support for **ITSO on Mobile** as required
- Representation at ITSO related events as required

Technical Specification

AMS-HOPS
Technical Specificati

The AMS-HOPs Technical Specification from the National Procurement Framework is available in the Members Area of the SAM Website

AMS-HOPS Package Pricing

Local Authority / PTA / Other Public Sector Member Pricing

The Core AMS-HOPS Package for Local Authority / PTA / Other Public Sector Members is charged on an all-inclusive basis per AMS-HOPS partition. The rate is per Active Card, and reduces with scale based on the number of Active Cards in each Scheme, with no premiums for cards from Commercial or Scholars Schemes. For clarity, an Active Card is a customer record/card which is still in the Members Scheme and which is neither expired, nor hotlisted or deactivated.

	Up to 100,000 cards	Over 100,000 cards	Over 200,000 cards
AMS-HOPS Package (per Active Card) Annual	£0.35	£0.25	£0.10
Migration Fee (one-off)	Agreed per scheme depending on complexity		

Members are billed in advance, at the beginning of the new Financial Year. Should a Member wish to withdraw from the Package, the standard notice period to SAM is 6 months.

Optional Services Available

The following optional services are available to any SAM Member to complement the core AMS-HOPS Package. All optional enhancements are covered within the National Procurement Framework, and a Member is able to add them to their core package at any time during the contract period, through providing SAM with a Purchase Order.

Ref:	Detail	Cost
HP4	ISAM Profiling 1 – 500 ISAMs	£30 per ISAM
HP5	ISAM Profiling 500+ ISAMs	£25 per ISAM

Contact Us

To discuss the AMS-HOPS Package, please contact:

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