



WORKPRO COMPLAINTS MANAGEMENT SYSTEM

G Cloud 10 Lot 2 - Cloud Software

SERVICE DEFINITION

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2 AN INTRODUCTION TO WORKPRO

This document gives an overview of the **Workpro Complaints Management System** (Workpro Complaints).

Workpro Complaints helps an organisation to improve the quality of its complaints handling and reporting - while reducing associated costs and risks.

It efficiently manages all complaints and enquiries in one integrated system. Subject Access Requests (FOI, EIR, DP) cases can be managed in the same system, and other case types can be added.

Workpro delivers:

- **Secure, comprehensive system** to store and process all complaints, enquiries and feedback
- **Consistent process**; clear workflow ensures transparent, fair case handling
- **Reduced case handling costs**, duplication of effort eliminated, faster processing
- **Increased productivity**; alerts, reminders, workload management tools drive great service.
- **Convenient access** to all case documentation, stored in case record
- **Standardised, quality documentation** easily produced using auto-populated templates
- **Compliance**; procedures and rules reflected in process steps and targets
- **Performance monitoring and control**; 'at a glance' views of KPIs, task and case status
- **Improved reporting** (scheduled, ad hoc, dashboard) from appropriately categorised data
- **Lessons learned** from case outcomes, through root cause and trend analysis.

Workpro is:

- Fully featured, 'ready to go' software that is also customisable and adaptable
- Familiar Microsoft based technology, with an easy-to-use, logical interface.
- Web-browser based, with a responsive design that can be used on a variety of devices.
- Highly secure, with the ability to restrict user permissions if required.

2.1 Complaints Management Expertise

Workpro is developed by Computer Application Services (CAS) Ltd. Established in 1969, CAS has a proud record of designing and implementing high quality, robust IT solutions. The RAF for example has been a client for over 30 years.

We have supplied complaint management systems since 2003, first to the Ombudsman/Regulator community, now to organisations at the sharp end of complaints handling. Our Workpro complaint management solution continues to be developed in conjunction with feedback from our users.

As an employee owned company, every team member takes a personal interest in the delivery and successful implementation of your solution. Friendly, professional and approachable, our aim is that your solution is exactly what you really need.

3 WORKPRO COMPLAINTS FEATURES SUMMARY

Please visit our website www.workpro.com for more product information and case studies.

All complaints efficiently logged and processed



Complaint Capture

Record all case details across multiple channels. Context sensitive input screens with look up lists for speed and accuracy.



Configurable Workflow

Multiple case types supported, each with relevant workflow and targets to guide users through the correct process at every stage.



Alerts, Reminders and Alarms

Highly visible prompts, validation rules and threshold alerts keep cases on track, ensuring timescales and processes are adhered to.

Improved productivity and reduced cost of delivery



Case and Task Ownership

Allocated person per case. Manual and system generated tasks. Re-assign cases and tasks as necessary.



Document Management

Multiple document types supported. Document bundling and multiple upload facilities. Microsoft Word and Outlook integration.



Auto-populated Templates

Templates for faster production of quality correspondence. Auto-population of case data saves time and ensures accuracy.

Reporting, analysis and management information



Flexible Reporting

Scheduled and ad hoc reports, including regulatory reporting where required. Categorisation features ensure accurate data scrutiny.



Real-Time Performance Monitoring

Dashboards, plus multiple case and task views track KPIs, highlight any issues and ensure optimal resource utilisation.



Quick and Advanced Search

Everything is searchable, down to document level, with flexible filtering. Linked Case or Precedent Case tagging.

Reduced risk and investment protection



Root Cause and Trend Analysis

Learn from case outcomes. Analysing trends and root causes will help you make product, service and process improvements.



User Maintained Admin Tools

Administration tools allow aspects of the system to be maintained by an authorised user, e.g. Lookup Lists, KPIs, user permissions.



Security, Audit and File Management

Authorised access only, with system and case level restrictions. Full audit trail. File management tools aid DP/GDPR compliance.

4 WORKPRO COMPLAINTS FUNCTIONALITY

Workpro Complaints is a version of Workpro specifically designed to meet organisational complaints management requirements. It comes pre-configured with a number of features ready to use “out of the box”.

These built in features deliver proven, good practice complaint management processes and are designed to get you up and running quickly. Many elements of the system can be maintained by authorised “super users” (System Administrators) with appropriate training.

Workpro is a “ready to go” solution, but is also extremely flexible and scalable should you require it now or in the future. Compliance with specific business or regulatory rules and timescales can be reflected in the workflow for instance. Please see Section 5 for information about additional services and product options available to Workpro clients. These services are available on **G Cloud 10 Lot 3 – Cloud Support**.

4.1 Complaint Capture

Workpro simplifies and speeds up the logging of new complaints and requests, however they come in.

A unique case record is created for every complaint received. Each case is assigned a unique Case ID.

Multiple Channels

Complaints and enquiries can come from a variety of sources: phone, letter, email etc.

SMS texts, web form and telephony integrations are also available (*please see section 5 for details*).

Multiple contact types can be stored in the system: Complainant, Interested Party etc.

User friendly interface

Easy to use forms minimise keying and avoid duplication of effort, saving time and reducing cost:

- **Context-sensitive input screens**
Users only see what they need to see, reducing time and ensuring a good user experience.
- **Look-up Lists**
Commonly used information, such as contacts and organisations details, is stored in the central repository so that information does not need to be re-keyed.
- **Free form text boxes**
Allow you to record all the information you want, complete with spell checkers and formatting tools.
- **Return to latest activity**
Users can have multiple cases open at once and return to the last activity on a case, which is automatically saved. For example, if a phone call comes in, demanding action elsewhere in the system, they can easily return to where they were at the click of a button.

Multiple Device Support

Workpro has a responsive design so that the Workpro interface can be accessed via alternative devices, such as tablets.

Workpro Web Form Option

A Workpro Web Form is available which can be used to easily log cases by frontline staff and others. This “smart form” is a simple one-page interface which allows users to quickly capture cases and submit them to Workpro for further handling or statistics (if closed at frontline). *Please see section 5 for more details.*

4.2 Configurable Workflow

Standardised best practice workflows facilitate appropriate frontline resolution and escalated handling of complaints.

The steps a user follows are driven by the nature of the case type (how sensitive or how urgent for example), and the key thresholds and timescales that are built in to the workflow adapt accordingly. Different case types can follow different workflows.

Multiple Case types

Workpro can manage multiple case types, each with their own distinct workflow process.

Workpro Complaints comes with a starter set of case types to get you up and running quickly. These are pre-configured as follows:

- **Complaints** – a complaints handling process based on recommended best practice.

The Complaints case type has three stage workflow as standard:

- Frontline
- Investigation
- Review.

- **FOI/DP** – a standard freedom of information and data protection workflow

The FOI / DP case type includes the following Case Sub-types:

- EIR (Environmental Information Request)
- FOI (Freedom of Information Request)
- DP (Data Protection Request).

The FOI/DP case type has the following two stage workflow:

- Information Request
- Review.

Additional case types can be added if required.

Workpro is very flexible and will allow adjustments and additions to workflow, categories and case types according to your business need. *Please see section 5 for details of Workpro options and services.*

4.3 Alerts, Reminders and Alarms

Highly visible prompts, validation rules and threshold alerts guide staff, ensuring timescales and processes are adhered to. Standard KPIs are built in to the workflow.

Alerts

Staff receive automatic alerts of impending tasks, deadlines and any high risk cases. The system also alerts staff to any mandatory missing information to ensure due process is followed and key data captured.

Workpro can issue auto-generated messages (email alerts), e.g. to indicate that an acknowledgement letter has not been marked as issued.

Validation rules

Standard validation rules ensure all key case facts are recorded, including essential categorisation data and other information defined as mandatory. They ensure main reporting inputs are captured for future analysis, audit trails and compliance. Good data in ensures good data out.

Users will not be able to close or progress cases until these validation rules are passed and the minimum data standards are reached.

Validation rules can either be enforced (i.e. a case can't be saved with invalid data), or advisory (the system will display a warning message).

Data entry fields can be conditionally shown or hidden based on previously entered data selected from pull-down lists.

Notifications

Notifications can be added to any case, for example to make staff aware that a client is hard of hearing, or visually impaired so needing Braille documents.

Traffic light system

Red/Amber/Green traffic lights provide highly visual alerts to highlight priorities and approaching deadlines.

A User Notification section at the top of the Workpro screen gives users a constant visual indicator of incoming emails and task status.

4.4 Case and Task Ownership

Users and managers have full visibility of all case activity and status.

Case Ownership

A named person is allocated for every case. This ensures complainants have one initial point of contact, staff know who is responsible for what, and it is easier to keep all stakeholders up-to-date and informed, e.g. feedback to complainants on progress.

Case and Task Re-assignment

Workpro allows authorised individuals to re-allocate cases and tasks as required, for example in the case of staff absence.

Tasks

Tasks are automatically generated at key workflow stages, such as targets for acknowledgements. They can also be created and edited by users as needed:

- Both automated and manual tasks can be set at any stage in the workflow for a case.
- Tasks have target dates and, optional, reminder dates.
- Users are able to see their own individual tasks and targets, and those of their team, while more senior users e.g. Senior Officials and Management, can view the status of all complaints at an individual, team or organisational level.

4.5 Document Management

All documentation associated with a complaint is held and managed in one place. Everything is to hand, ensuring a timely response and that nothing is lost. The integrated document management system means everything is searchable, secure and backed up.

Standard template letters and emails are available at relevant stages in the workflow (*see section 4.6*).

Document Summary

The case record contains a document summary of all incoming and outgoing documentation, all clearly visible and easily accessible from a single view.

Document Preview

A Document Details toggle tab allows users to easily see document information from the Document Summary, including a thumbnail image of the first page, without having to open the document.

Document derivation information is also displayed, showing the source of a document.

Supported document types

Workpro supports all electronic document types including scanned documents. The most commonly used document types are:

- **Word and other MS Office documents** e.g. Excel and PowerPoint files.
- **Outgoing and Incoming emails**
 - Users can send emails directly from cases
 - These emails are automatically attached to the case record
 - Users can attach any other case documents to the outgoing email
 - Incoming emails can be processed and assigned to a case
 - Both simple emails and emails with attachments can be added to case records.
- **Comments and notes**
 - Quick notes function allows users to record status updates or other notes (e.g. telephone call notes, meeting notes)
 - More detailed document notes can be created and added to the correspondence log
 - Notes are automatically attached to the case record and visible in the document summary.
- **Scanned documents**
 - Workpro users can attach electronic files generated from scanned physical correspondence to each case record.
 - Note that scanning facilities are not included with the Workpro solution. *This functionality would be added as an additional service under G Cloud 10 Lot 3. Please see section 5.*
- **Image and PDF files**
- **SMS texts**
 - Workpro can be integrated with SMS text messaging subscription systems. *This functionality is available as an additional module. Please see section 5.*

All of this information is searchable.

Multiple Upload of Documents

Multiple documents can be uploaded to a case at one time.

Document options (e.g. category, folder, sent date) can be set for all documents or individually.

Document Bundling

Workpro includes the ability to combine multiple documents into a single pdf. Multiple documents in the Workpro Document Summary can be selected to create a single multipage document from them. This is particularly useful when sharing workloads with organisations external to Workpro.

4.6 Auto Populated Templates

Professional, high quality letter and email templates promote accuracy, consistency and conformity in correspondence. This speeds up response times and reduces the administrative burden for staff.

Correspondence is automatically populated with case data, such as name, address and case reference number.

Five document and email templates are included in the standard package. Templates can be added and amended as required by users with appropriate permissions. CAS can provide support in producing additional templates if required.

Microsoft Office Integration

Seamless integration with Microsoft Word (for letters) and Exchange (for emails) gives users full editing capabilities, so they can tailor and personalise the correspondence as required.

Multi-Record Support

Information from multiple records and data fields can be displayed in one document, so that all pertinent details can be easily included in any correspondence.

4.7 Flexible Reporting

The advanced reporting features in Workpro are a key strength of the system.

All data and documents in the system can be interrogated to produce statistics or reports. Everything is available for analysis, providing invaluable management insight that helps you to continually improve and deliver better products and services, as well as meet any regulatory obligations.

Automatic, Scheduled Reports

Reports can be automatically scheduled or created on demand.

- Five reports are supplied with the standard system
- The library of commonly used reports can be built up over time.

Ad-hoc Report Writer

Ad-hoc reports can also be created at any time. Microsoft SQL Server Reporting Services is the default reporting tool, but users have the ability to use other Microsoft reporting tools to generate reports as required.

Training on report writing is available and CAS also provides report writing services. *Please see section 5.*

Multiple report formats supported

All reports can be exported to other applications and formats, e.g. Excel, Word, PDF. Easy to use, drag and drop reporting tools help you create all manner of reports, including graphical, visually pleasing outputs.

Categorisation and Classification

Categorisation data is collected as part of the workflow, supporting data query. You can "slice and dice" the information any way you want.

Categorisation and classification fields (e.g. category of complainant or organisation, outcomes) are supported by look up lists that are client maintained.

4.8 Real-Time Performance Monitoring

Dashboards and real-time case and task views track performance. Monitoring can be done by individual case, staff member, team caseload or across the whole organisation.

Dashboards

Dedicated user interfaces are available to reflect different monitoring and reporting needs: Caseworkers, Occasional Users, Team Leaders and Managers. Drill-down facilities allow you to quickly look behind the data, for further investigation.

- 2 dashboards are included with the standard system
- Customised dashboards are available as an additional service. *Please see section 5.*

Case Tracking

Various case tracking views ensure staff can see exactly what stage any case is at. Managers can track case progress and measure it against set targets, identifying any bottlenecks and issues early on.

Workpro provides a number of caseload and task views for open cases for each individual, team (service area) or the entire office including: My Caseload, Office Caseload, Overdue Cases, My Tasks, Overdue Tasks etc.

Additional caseload and task views can be set up for specific requirements as an additional service. *Please see section 5.*

4.9 Quick and Advanced Search

Workpro accumulates a wealth of information, forming a flexible and very comprehensive database.

Quick Search

Staff can easily find cases, or answer a customer query quickly. Hyperlinks in the search results allow you to go straight to the case or document from that screen.

Advanced Search

The data in Workpro can be queried in any way you want. Users can tailor search to their requirements and store queries for future use.

Search capabilities include:

- Case record searches
 - Targeted searching of defined fields, e.g. enquirer name, address or postcode
 - Each user can define their own specific search criteria and change as necessary
 - Free text searches, this will search across multiple fields for cases that contain matching text.
- Document Search
 - An important feature is the ability to search the content of a document
 - Users can perform free text searches of all case documents. This will search the contents of all case correspondence and return found matches.

Linked Cases

Cases can be 'related' or 'linked' together. This is useful for combined processing, for example where cases are from the same individual, or from multiple parties involved in the same incident. It is also useful for

highlighting possible trends, clusters or repeat complainants. Linked cases have a stronger bond than related ones.

Precedent Search

Cases can be marked as Precedent or Landmark cases to improve the consistency of decisions. Lessons learned can be shared with the team.

Filtering

Cases can be filtered by product or service line, or chronologically.

4.10 Root Cause and Trend Analysis

The Case Outcomes section in Workpro provides invaluable data which allows you to identify trends and analyse root causes. By pinpointing common case types or recurring issues for example, you can see where improvements in your service or product can be made.

4.11 User Administration Tools

Administration tools allow aspects of the solution to be maintained by users with the required access level and training (*training options available in section 5*).

Authorised users can make changes to the following elements, without CAS input:

- Look-up Lists
- Categories and classifications
- Document templates
- KPIs (targets, thresholds and alerts)
- User permissions
- Some file management and data retention activities.

4.12 Security, Audit and File Management

Access to the system or certain cases is restricted according to your company policy, protecting sensitive data. Workpro is extremely configurable in setting user security roles and controlling who has access to data. User permissions and security settings are maintained by you.

Security Groups

Can be used to control access to specific data / workflow sections of the system. The standard for Workpro is that users can be segregated in to the following groups:

- **Reader** – users only have read access to the system.
- **Editor** – users can have edit access to case records but read access to other sections of Workpro, e.g. central administration data records.
- **Data Administrator** – users have edit access to all case records and central administration data records.
- **Administrator** – users have full access to Workpro and can perform certain restricted actions.

At additional cost, Workpro can be configured with further security groups, restricting access to functions within the system as defined by the client.

Chronological Audit History

Every detail, every action on a case is recorded in the Case History. This full audit trail shows exactly what has been done, by whom, when. This enables you to demonstrate compliance and transparency, and to prove that due process has been followed.

File Management and Deletion

Workpro includes a file management utility which supports client records management and document retention policies. This can be important for conformance with data protection policies for example.

The file management interface is clear and easy to use. It is designed to allow administrators full control over which documents and cases are targeted at all times during the process:

- Rules are configurable, to determine which cases are targeted and when.
- The process can be scheduled and automated.
- Colour coded tabs and buttons clearly define which processes are scheduled.
- Targeted cases are presented in a clearly laid out grid with filtering options.

File management consists of a number of possible sub-functions, these are:

- Physical file destruction
- General document destruction
- All document destruction
- Case data anonymisation
- Partial case data destruction
- Case history data destruction
- Full case data destruction.

5 OPTIONS, SUPPORT SERVICES AND TRAINING

Workpro Complaints comes pre-configured with a core set of features ready to use “out of the box”, as described in section 4. These are designed to deliver proven, good practice complaint management processes.

In addition, Workpro has a number of optional modules and is also a highly configurable product. If your organisation requires any changes to the standard product, CAS Business Analysts can work with you during the implementation phase to ensure any specific requirements are reflected in your system.

5.1 Core Workpro SCM Package

The core Workpro Standard Complaints Model (SCM) system is preconfigured with the following to get you started (as described in section 4):

- 2 standard business process case types (Complaint and FOI/DP)
- 3 stage case workflow for Complaint case type
- 2 stage workflow for FOI/DP case type
- 5 standard document templates for creating template letters and emails
- 5 standard reports
- 2 dashboards (User and Manager).

5.2 Standard Setup Service

Our Setup Service is required with every Workpro implementation, to set up a client instance of Workpro on the Workpro Private Cloud and to ensure client specific security settings are in place. The Workpro Private Cloud is hosted on UK based data centre infrastructure managed by our hosting partner iomart Group plc. (see section 7).

5.3 Optional Modules

The following features are optionally available:

Workpro Web Form

A Workpro Web Form is available which can be used for easy logging of cases by frontline staff and others. This “smart form” allows users to quickly enter case data on a simple one-page interface. The form is configured to show the same categorisations and lookup data used by Workpro. Submitting the form creates a case in Workpro with case details auto-populated.

If the case can be closed immediately, then this can be indicated on the smart form together with the outcome, and the closed case is then submitted to Workpro to capture statistics. Alternatively, the case can be submitted to Workpro for handling by the complaints team.

This form can also be ‘personalised’ to your requirements if required. See section 5.

SMS Text Integration

We also have experience of integrating Workpro with SMS text messaging subscription systems. This functionality requires a small add-on.

MS Outlook Plug In

An Outlook plug-in can be installed which allows users to file emails and associated attachments directly into the correspondence folder of an existing case.

Postcode Address Lookup

An optional postcode lookup can be added.

5.4 Support Services

Workpro is a ready to go solution, but is also an extremely flexible, scalable and customisable product.

CAS Business Analysts are available to work with you during the onboarding phase (and beyond) to ensure the solution reflects any unique organisational requirements. The aim is always to work as closely to the core product as possible so that customisation can be achieved quickly and cost-effectively.

CAS support services are available through our listing for **Workpro Cloud Support Services in G Cloud 10 Lot 3**. Please see the associated **Workpro Cloud Support Pricing** document for costs involved.

Configuration Changes or Additions

See section 4.11 for the user configuration options within the standard system. Expert services are also available to help with client customisation, for example:

- Changes to the standard workflows or case types
- Additional workflows or case types
- Changes to menus, forms and data fields (e.g. per user type)
- Changes to the standard Workpro Web Form.

Integration Services

Workpro utilises APIs (Application Programming Interfaces) to allow easy integration with your existing systems. Integrations can include for example:

- Integration with client website using web services
- Customer email platform integration (emails sent/received using customer's email domain)
- Telephony system and call recording integration
- Scanner integration
- Integration with other Client systems (e.g. CRM).

Reporting Services

The SQL Report Writer available with the Workpro system is a powerful tool, and users can create their own reports at any time without CAS help (training in report writing can be provided – *see section 5.5*). CAS can also provide the following reporting services:

- **Reporting Datasets Service**

Datasets structure and collate the data collected in Workpro so that you can more easily write reports without the need to understand the underlying database structure. This also makes aggregated reporting with other data sources much simpler.

Standard datasets are included with the core SCM product – these allow you to report on all case data. CAS Business Analysts can also produce additional, bespoke datasets to augment the reporting capabilities from Workpro, for example to include specific business calculations to ensure they are used correctly and consistently across reports.

- **Report Writing Service**

Our Report Writing service is the next level of support available, where we write defined reports for you. CAS Business Analysts are very experienced in analysing and developing reporting

requirements in the Workpro environment. Well written re-usable reports can save you a lot of time and money in the long run.

Data Migration Service

- **Scheduled Import of Administration data**

Administration data is centrally held information such as commonly used contacts or organisation details. This can be imported from other systems. Workpro can be scheduled to import this data automatically, ensuring lookup list data etc. is in sync with your primary data source. It also saves time and keying errors.

- **Migration of Existing Case Data**

Existing case data can also be imported into the Workpro system, from an older system for example. CAS will provide a recommended format for supplying the data.

5.5 Training and User Help

While Workpro is designed to be intuitive and easy to use, we recommend training on the system in order to ensure that your organisation is able to use it to best advantage.

A **Workpro User Guide** is supplied with the system and is accessible by a help link on screen.

Training Options include:

- **User Training** - One day of training on the system, in groups of up to 8, to cover:
 - Entry of case data
 - Workflow steps in case handling
 - Composing correspondence
 - Printing reports, etc.
- **System Administrators Training** – A half day of training, in groups of up to 4, to cover, :
 - Managing the reference data
 - Compilation of templates.
- **Report Writer Training** - A half day to one day training, in groups of up to 3.
- **Train the Trainer** - 1 day for group of up to 8 trainers on user training.

Training can be delivered on or off-site, and online training sessions are also available.

5.6 Support and Maintenance Packages

We highly recommend a support and maintenance package is purchased with your system. *Please see section 7.3 for details.*

6 TECHNICAL INFORMATION

Workpro is built on Industry Standard Microsoft Technology (Microsoft SQL Server and ASP.Net).

As a web-browser based product Workpro can be used on any supported web-enabled device, subject to security / access permissions. Workpro has no more significant bandwidth requirements than accessing other online applications.

System Requirements:

- Workpro requires Internet Explorer 10 or higher, but IE11 or Edge is recommended.
- Mozilla Firefox and Google Chrome are also supported.
- Case documents are created in Microsoft Word format. For full integration when working with case documents, while MS Word 2007 or higher is supported, 2010 or above is recommended.
- Workpro also offers Microsoft Outlook integration, requiring Outlook 2007 or higher.

6.1 Accessibility

Workpro is currently WCAG 2.0 A compliant, and it complies with many aspects of the WCAG 2.0 AA standard. We are working towards full implementation.

Workpro has a responsive design which can be accessed from any mobile device.

6.2 Encryption of Data at Rest and in Transit

Encryption of Data at Rest and in Transit is included with every standard Cloud Hosted Workpro solution.

6.3 Note on Open Source

Please note that Workpro is a proprietary product and will not be made available as open source. Buyers can access the source for configuration and any data loading (ETL) functions which are created as part of their project.

7 HOSTING AND SUPPORT

7.1 Hosting Partner

Workpro is hosted in a secure Private Cloud on UK based data centre infrastructure operated by our hosting partner iomart Group plc.

Iomart is a UK based cloud company with wholly-owned secure data centres in 8 UK locations, and more worldwide. Managed cloud hosting support (provided by iomart plc) is 24/7, 365 days a year. Iomart provides a Service Availability Guarantee of 99.9%. For more information, visit www.iomart.com

Different configurations of cloud hosting are available through iomart, allowing you to tailor the level of security and resilience to meet your business needs, including dual load balancing for extra resilience, for example. *This is not part of the standard Workpro G Cloud 10 offering, but can be purchased if required.*

CAS also has extensive experience of working with government infrastructure networks, as well as other suppliers of cloud based hosting services if preferred.

7.2 Backup/restore and disaster recovery

Workpro installations include daily backups to capture information recorded during the working day and providing a daily recovery point.

Iomart data centre facilities include backup (and off-site storage facilities) and recovery procedures to ensure system availability and data retention in the event of a system failure or disaster occurring. All infrastructure items used (including power, server and communications hardware) include fully redundant hardware features to avoid single points of failure.

A fault tolerant system which provides automatic disaster recovery can be offered by iomart for additional cost.

7.3 Support and Maintenance

If you purchase a Support and Maintenance package for your Workpro application (highly recommended), a Service Level Agreement (SLA) will come into effect. This details maintenance activities and expected response times for support activities.

CAS operates an ITIL compliant support operation comprising of manned help desk with backup technical resource as required. Support is available through:

- Online support portal (available 24/7/365)
- By email or telephone (helpdesk)
- Remote support via dedicated link.

Online Support Portal

Clients can securely log and monitor their technical support requirements through the online support portal 24/7/365.

- Colour coded Issue List provides complete visibility of priority and status.
- Billing dashboard shows support hours used and how many remain on your contract.
- Reporting dashboard includes graphs that show for example, number of issues raised, closed or currently open.

Upgrades

Workpro is an evolving product and one system upgrade is available to customers per year as part of the Workpro Licence Agreement.

Support Hours

Standard Workpro application support hours are Mon-Fri 9-5, excluding the Christmas and New Year period. Out of hours cover is available at extra cost.

Managed cloud hosting support (provided by our hosting partner iomart plc) is 24/7, 365 days a year. Iomart provides a Service Availability Guarantee of 99.9%.

Response Times

Priority	Fault Level Description	Target
1	System non-operational and affects the majority of (>50%) users	<i>Respond < 1 hr Resolve < 4 hrs Mon-Fri</i>
2	System non-operational and only affects a minority (<50%) of users	<i>Respond < 4 hrs Resolve < 8 hrs Mon-Fri</i>
3	Identifiable fault but system still operational, minor faults and advice	<i>Respond < 4 hrs Resolve – next planned release</i>
4	Cosmetic issues which do not affect the operation of the system	<i>Respond < 8 hrs Resolve – next planned release</i>
5	System enhancements, new and additional features	<i>Respond < 8 hrs Resolve – resolution according to negotiation</i>

7.4 Information Assurance

CAS operates a Security Management System which is **ISO27001** certified. Our codes of practice are certified to **ISO 9001:2000** standard. We also have **Cyber Essentials** and **ISO 14001** (Environmental Management) certifications.

Iomart plc hosting services are accredited to ISO27001 Information Security Management System. Iomart has further accreditations in ISO 9001, ISO 14001, ISO 27001, Cyber Essentials, and many others. Iomart is also certified to provide secure infrastructure and cloud services to PSN-connected public sector bodies.

8 ONBOARDING/OFFBOARDING

8.1 Onboarding

Ordering and Invoicing

All pricing is exclusive of VAT. Please see the following documents for pricing information:

Workpro Cloud Software Pricing - G Cloud 10 Lot 2

Workpro Cloud Support Pricing - G Cloud 10 Lot 3

Payment terms are 30 days from date of invoice.

System Setup

Once contracts are signed, clients will be set up with an instance of Workpro in the iomart Private Cloud.

At this point the Licence is valid and users can start using the system.

Optional Support Services

If additional Support services have been purchased, the client will be assigned a designated CAS Business Analyst who will be responsible for the delivery of their configuration changes.

8.2 Offboarding

Contract Termination

Clients must provide one month notice of termination and complete a service termination form.

An exit plan will be agreed including data extract arrangements.

Data Extraction

Data and document extraction is included in the price of the contract:

- We would provide client data in the form of a spreadsheet when the contract ends. We would also transfer any stored documents to a client drive.
- Provision of data extracts in other formats would be chargeable according to our rate card.
- After contract termination, all live client data will be deleted. All customer specific backups will be destroyed. Client data may still be held on shared system backup tapes. If clients require to have individual backup tapes and not be part of the shared backup this must be notified at time of ordering. There is an additional charge for providing individual backup services.