

Retain Cloud

Service Description 2024

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1 Introduction

Retain is a Resource and Talent Management platform. Our mission is to unlock agility, people, and business performance. Retain is a deeply featured, globally scalable, professional services automation platform with everything needed to run and manage a people-based business.

Retain Cloud has been developed iteratively over 25 years through the ideation and feedback from over 1.5 million resources and 200 industry-leading professional services firms. Built on Azure, and working in partnership with Microsoft, Retain Cloud is specifically designed for professional services firms, for whom people are at the core of everything they do.

This document is designed to provide a brief service description/overview.

2 Functional Overview

Retain Cloud is configured using the application's web front end by users who have been granted system administrator privileges. The configuration options available in Retain Cloud are vast but some of the key configurable features are described below.

2.1.1 Plans

Plans are used to view Jobs and resources with Retain. Filters can be applied to these plans to show only the Jobs/resources that are relevant to the user. These filters can be saved as either a public or private plan for later viewing.

The data presented on the plan can be customised to show any of Retain Cloud's static or calculated data such as utilisation, availability, grade, location, etc.

Individual or team diaries are built into the plan visualisation and these unpin the relevant calculations.

Custom colour themes can be created to help users easily recognise data based on criteria that and most important to them and conflict (i.e. resource overallocation based on configured thresholds) warnings can be enable or disabled.

2.1.2 Table View

Offering similar functionality to plans, table view allows users to manage resource time and hours in a tabulated format. This allows users to rapidly create bookings with varying time allocations across a time period using a familiar cell format.

2.1.3 Notifications

Notifications are used to inform users of an event or activity. For example, a notification can be sent by email or through the notifications page to a talent when they are booked to a job, or a notification can be sent to resource manager when a resource they manage has been requested.

Each type of notification can be turned on or off as per the users' preferences.

2.1.4 Resources

A resource is the default term for a person within Retain Cloud. These are the people who can be booked to Jobs and whose time is to be managed. The term 'resource' can be customised to better fit with an organisation existing term e.g. resource can simply be renamed to 'person'.

2.1.5 Bookings

A booking is an allocation of an individual resource (or several resources) to a specific job which covers a defined date range and a measurable number of hours. Bookings can be confirmed or unconfirmed.

2.1.6 Profiles

Profiles are used to manage and display information about a resource's professional skills, certifications, experience, work history and more. They serve as tools for those who are trying to find a qualified resource to take on a specific role or responsibility. Having an up-to-date profile enables other users to find others when they are looking for candidates to take on job or a project.

2.1.7 Jobs/Projects

A Job or Project is a discrete body of work that multiple resources work on and are typically done on behalf of a client.

Jobs/Projects can also represent non-work activities such as vacation or sick leave which may be excluded from resource utilisation calculations.

2.1.8 Roles

A Role is an expression of staff requirements or demand. Roles can be created and requested to compare the costs of upcoming work using existing resources. A role may not always translate into a future booking.

Resources proposed to Roles can also be rejected and the reasons captured so that an audit trail can be maintained.

2.1.9 Role Templates

Role Templates can be used to quickly create new Role requests that meet predefined criteria e.g. a Senior Manager Auditor Role Template may specify talent requirements based on specific grade and skills. Role Templates can be created from existing Roles or manually on demand.

2.1.10 Skills

Skills can be set up and displayed in the talent profile. Skills can then be used to as requirements for roles.

2.1.11 AI Suitability Matching

Retain Cloud optimizes customers' workforce with Intelligent AI Matching by harnessing the power of artificial intelligence when suggesting resource to roles. The AI Suggestion Engine seamlessly integrates with Retain Cloud, offering unparalleled precision in workforce planning. Talents' skills and work history are combined to recommend people to fill Roles who either meet the direct requirements of the Role or who are closely aligned to the Role's requirements.

Here's how it works:

- **Intelligent Resource Suggestions:** Our AI considers both exact and similar skill sets and work experience when suggesting resources. But it doesn't stop there. It provides explanations for each recommendation, allowing planners to understand why a particular resource is suitable.
- **Machine Learning Insights:** The engine analyses skill co-occurrences and combinations, revealing patterns that influence suitability. These insights are presented in an intuitive format, making it easy for planners to grasp the rationale behind each match.
- **Skill-Level Context:** We factor in skill proficiency levels. When a resource is recommended, the AI explains how their skill level aligns with the role requirements. This transparency ensures informed decision-making.

- **Client-Job History:** By incorporating previous client experiences, the AI provides context. It explains why certain resources are more suitable based on their familiarity with specific clients or industries.
- **Availability Indicators:** The AI transparently communicates resource availability. Planners can see whether a recommended resource is actively engaged or has scheduling constraints.
- **Empowered Planners:** Armed with explainable AI, planners confidently make assignments. They understand the reasoning behind each recommendation, ensuring optimal workforce utilization.

With the AI Suggestion Engine, Retain Cloud empowers planners to make strategic decisions backed by clear, interpretable insights. Transparency meets efficiency.

2.1.12 Roles Board/Marketplace

Roles can be published on a Roles board or Role marketplace. Potential applicants can take a detailed look at all the roles on offer, including their exact availability for that role, and apply to those of interest.

2.1.13 Shortlisting

Planners and Requesters can shortlist resources by highlighting their preferred resources from the list of suggested resources. Up to six resources can be shortlisted which can then be updated by adding or removing shortlisted resources.

2.1.14 People finder

A way to quickly perform searches for resources without changing the plan filters. Resources can be found based upon specific criteria e.g., skills, availability etc. A booking or role can be created from the search results.

2.1.15 Timesheets

This feature allows users to quickly log time against multiple Jobs.

2.1.16 Reports

Using embedded Microsoft Power BI, the reporting feature within Retain Cloud allows users to generate reports based on various data related to resources, such as time spent, allocation, and availability. These reports can be used to gain insights into the utilization of resources, identify areas where resources may be over or underutilized, and make informed decisions about resource allocation and scheduling.

Retain Cloud has standard report templates that can be customised and by adding additional fields and saved as custom reports.

2.1.17 Roll Forward

The Roll Forward feature streamlines the process of planning recurring seasonal tasks. It enables users to replicate selected bookings from one job to another in the future, with the option to mark them as either planned or unconfirmed bookings.

Based on client feedback in our next release users will also be able to duplicate multiple (1000s) Jobs simultaneously, with subsequent operations being queued. The duplication queue is visible in the Operations Log, providing detailed notifications of the duplication progress.

This feature is designed to enhance operational efficiency by simplifying the management of recurring and future bookings.

2.1.18 Project/Job economics

Cost and charge rates can be added to each talent's profile so that project cost and revenue can be calculated and reported on in real-time. Combining this with timesheet data allows whole project cost/revenue reporting that can be rolled up any organisational unit such as Client, Engagement Partner, Sector or Service Line level.

Fixed price or time and materials budgets can be added to Jobs allowing engagement managers to allocate resources that fit within the budgetary constraints.

2.1.19 Scenario Planning

Scenario Planning allows users to construct project teams in different configurations to based align to project budget constraints and then request bookings for the resources identified in the optimal plan.

2.1.20 Project Health Status

Heath Status can be assigned to a project so that Resource Managers and Project Managers can assess the progress of a project in terms of time, cost, and quality to determine the overall project health. An indicator indicating the Total Health of the project is displayed on Job/Project icon.

2.1.21 Milestones

Milestones allow Project Managers to convey status updates to stakeholders, keep track of the job timeline and assess whether planning is on the right track towards completing a job or falling behind schedule. Project Managers may use milestones on a job to define the scope of a job, research important Key Performance Indicators (KPIs) and to allocate resources.

2.1.22 Retain Mobile Application

The Retain Cloud Mobile Application is available through the Apple IOS and Google application stores. It allows resources to view and add comments to their bookings.

2.1.23 Settings

Settings are the customizable options that are available within Retain Cloud, allowing users to configure various aspects of Retain to meet their specific needs and preferences. These settings include options for adjusting the user interface, such as configuring custom fields, setting up user profiles or accounts, or defining default preferences such as currency or language options.

2.1.24 Custom Fields

Custom fields are defined by system administrators and clients to add their own fields to an entity such as Resource, Job, Booking, Role, etc. Custom fields can be created with the below formats:

- Plain text: a string of text up to 255 characters
- Formatted text: a longer string of text that may contain line breaks and up to 4000 characters
- Whole number: a whole number that can (optionally) be formatted as a currency, percentage and be set to fall within a min/max range
- Decimal number: as above, with an additional option to set how many decimal places are displayed
- Note: raw decimal numbers are stored at maximum precision and this option applies rounding
- Date: a single date
- Boolean: stores a true/false value presented as a yes/no switch
- Lookup: a single value that is selected from a predefined list
- Multi-select lookup: multiple values that can be selected from a predefined list
- Planning data lookup: a single piece of planning data (a resource, job, or client)
- History: multiple paired date + lookup values

2.1.25 Security Profiles

Security profiles can be configured and assigned to a user to determine what access that user has to the Retain cloud application. User access to specific page can be restricted entirely or the actions a user may perform can be restricted. E.g., a user may be restricted to only edit the Jobs they manage.

Rules can be set using predefined conditions or more complex rules can be configured using custom JSON rules.

2.1.26 Field Security

Individual fields be restricted with security profiles. Each field can be marked as editable, read only or hidden. This includes user created custom fields.

3 Technical Overview

Retain Cloud is a fully scalable, highly available, and performant SaaS solution hosted on Microsoft Azure. The solution leverages the benefits of Microsoft Azure, such as disaster recovery, backup, security, and monitoring. Retain Cloud operates in different geographies based on customer preferences for data residency and compliance requirements, with platforms hosted in various Microsoft Azure regions, including the UK, EMEA, US, and APAC. For Retain Cloud customers in the Microsoft Azure environment, we offer a system availability of 99.5%, excluding periods of planned maintenance.

Our customers have access to the customer portal 24 hours a day, 7 days a week. The Support Desk's standard hours are 0900 to 1730 Monday to Friday (GMT/BST), excluding Bank Holidays in the United Kingdom. At our entire discretion, the support team may be available between 0700 to 1900 to assist customers and we can also provide an out-of-hours 24/7/365 service for P1 incidents upon request.

3.1 Authentication (Connection)

Retain provides two options for login:

- One is to use the inbuilt password functionality.
- The other is SSO, using IdentityServer to act as a Federation Gateway we can authenticate using Azure Active Directory in which case users are authenticated using OAUTH against Azure Active Directory, and the email claim compared with the email of the user stored in the Database.

Our architecture allows for other external Identity providers to be set up, but currently only Azure AD has been implemented.

Access tokens are granted to the user and clients can configure the session and absolute timeout at the tenant level, to meet a customer organisation's security policy.

3.2 Account Provisioning

Security profiles can be configured and assigned to a user to determine what access that user has to the Retain cloud application. User access to specific page can be restricted entirely or the actions a user may perform can be restricted. E.g., a user may be restricted to only edit the jobs they manage.

Rules can be set using predefined conditions or more complex rules can be configured using custom JSON rules.

Individual fields be restricted with security profiles. Each field can be marked as editable, read only or hidden. This includes user created custom fields.

3.3 API

3.3.1 API Portal

The Retain Cloud API Portal serves as a gateway for integrating Retain Cloud services into customer applications. It provides a comprehensive API catalogue that adheres to RESTful standards, ensuring secure and seamless integration with third-party systems.

We offer three distinct REST APIs:

- DataAccess API: Grants access to Retain Core data.
- SecurityProfile API: Manages security profiles within the Retain Administrative Module.
- Reporting API: Provides read-only access for reporting purposes and to populate a customer's data warehouse.

Our API Portal is powered by Microsoft APIM, offering detailed documentation for each API. Customers can explore, learn, test, and request access to our APIs in a user-friendly environment.

Additional APIs are well documented in OpenAPI (swagger) format and can be given on request.

3.3.2 Security and Authentication

To secure our APIs, we implement OAuth 2.0 authentication. Which can either be maintained with passwords solely within

application or optionally linked to AzureAD to provide Single Sign on capabilities (recommended).

We ensure that only authorized users, or authorized managed service accounts can access the API, and they are always limited to the appropriate tenant's data, and only given access to APIs they have rights to. Data access additionally follows a flexible set of rules such that a user may only view or edit data relevant to themselves.

For enhanced security, we advocate the use of managed service accounts, for any integrations.

3.3.3 Managed Service Accounts

Retain Managed service accounts are designed to facilitate customer integrations without utilizing personal user accounts. Customers can create up to five service accounts, which are overseen by System Admin users. These accounts are strictly for integration purposes and cannot be used for direct login to Retain Cloud.

Management of these accounts is handled through a security profile which can be tailored to restrict actions that can be performed by the service account within Retain.

3.4 Environments

3.4.1 Customer Environments

Each Retain Cloud customer is provided with a bespoke and secure tenant database with no data being shared between customer tenants. A unique customer URL, typically the customer's business name, is assigned to each tenant. Approved and authenticated users can access Retain Cloud through Microsoft Edge or Google Chrome Browsers, noting that while any other modern can be used we do not assure our product's compatibility with these.

If required, a second customer tenant can be provided as a clone of the primary tenant in which customer can test changes prior to promoting to production.

3.4.2 Operational Upgrade and Maintenance Windows

Planned maintenance windows are pre-defined timeframes that are scheduled for us to apply product releases, patches, and preventative maintenance updates. Announcements are published on the Customer Portal with dates of maintenance activity and notifications will also be sent to customers with details of timeframes which will confirm any periods of service downtime. We aim to carry out all planned maintenance outside of customers working hours to minimize any service disruption.

We adhere to the Secure Development Framework for our environments, we operate a controlled test and release cycle through several internal environments:

- Development Environment
- QA Environment
- QA2 Environment (Performance & Load Testing)
- UAT Environment
- Production Environments

Details of generic planned maintenance on Production environments are in the table below:

Planned Maintenance	Duration	Notice
Annual BC/DR Test	On average 4hrs	Annually every August 7 Days confirmation and notice

Q1 Release (Mar)	On average 4hrs	Roadmap and indicative release date published 6m in advance 7 Days confirmation and notice
Q2 Release (Jun)	On average 4hrs	Roadmap and indicative release date published 6m in advance 7 Days confirmation and notice
Q3 Release (Sep)	On average 4hrs	Roadmap and indicative release date published 6m in advance 7 Days confirmation and notice
Q4 Release (Dec)	On average 4hrs	Roadmap and indicative release date published 6m in advance 7 Days confirmation and notice

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Annual Certificate Maintenance	On average 2 hrs	7 Days confirmation and notice
Monthly Patching	No outage required	No notice

3.5 Maintenance

3.5.1 Upgrade management

Our innovation is driven by a continuous cycle of ideas, feedback and requests from our customers to keep growing and improving our customers' experience. Our Retain Ideas customer portal is our hub for innovation and is where customers can submit new ideas and vote on existing ones. These customer ideas and suggestions underpin our product roadmap and so we encourage our customers to use our Ideas Portal to help us develop and refine our product's future.

After submitting an idea our research team will reach out to the submitter and include them as part of the research activities to shape the roadmap idea.

As we undertake development, we manage our upgrades through our Secure Development Framework, which underpins our ISO27001 certification. We operate a controlled test and release cycle through multiple environments:

- Development Environment
- QA Environment
- QA2 Environment (Security, Performance & Load Testing)
- UAT Environment
- Production Environments

Each new feature or enhancement is promoted sequentially through these environments once the quality standards for that test phase have been met. By the time a release is ready for production deployment it will have passed unit/system, manual/automated regression, penetration/vulnerability assessment, performance/load and user acceptance test phases.

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We do not operate a service model where clients approve a release for promotion into production - Retain control the release cycle and it is implemented globally. Safety controls are in place with feature flags and backwards compatibility to ensure there is no negative impact from a new release.

3.5.2 Functional Maintenance

Our custom and practice to date has been to provide the roadmap and new functionality at no additional charge however we always reserve the right to charge for additional roadmap functionality in future releases.

We intend to undertake quarterly releases; these are automated and will not require intervention from customers. From time to time, we may disable new features by default and this will be transparent in the release briefings and notes, along with help guidance on how to enable. For each release we communicate a release briefing with new features and bug fixes, these communications are also available on our portal.

We also have an online help document with a “What’s New Section”, please find an example in the following link:

<https://help.retaincloud.com/>

We have a strict security patching methodology for operating systems and servers. In line with Microsoft vendor release patches are applied monthly. Non-security-related patches are reviewed, prioritized, and included in our SaaS release process.

Retain operations and security teams assess and remediate critical security vulnerabilities within 24hrs and high-security vulnerabilities within 7 days. Any non-critical third-party software is updated as part of our release management process.

For customer issues raised which cannot be resolved by the Retain Support team and for where a software bug is identified, then a problem is raised with the Retain Development team with full replication details and a priority based upon business impact and customer urgency.

For all software bugs raised, a Known Error Knowledge Base (KB) article is created which contains the problem description and provides the workaround where available. Release notes will include details of the customer bugs that have been fixed and the Known Error KB articles will be updated to include the release version, root cause, and resolution details. This process has been implemented with a view to improve customer visibility as the Known Error KB articles can be subscribed to on the customer portal for progress updates and resolution details.

4 Support

4.1 Customer Onboarding Support

Retain Cloud is designed to be entirely configurable through the application's web front end. With a small amount of training customers are able to implement simple configurations with minimal support. However, we recognise that many customers have complex requirements that need to align to existing or new business processes and for those customers we provide chargeable implementation services through our experienced Professional Services Team.

- Services provided by our Professional Services team include:
- Supporting the definition of customer requirements
- Application of relevant configurations
- Migration of data into Retain Cloud from other customer systems
- Integration between Retain Cloud and other customer systems
- Provision of comprehensive training to different customer stakeholder groups
- Supporting the planning and execution of customer test activities
- Supporting the transition into Retain Cloud live service
- Providing post transition dedicated early life support

4.2 Service Levels, Reporting and Availability

The Retain Service Charter contains details of the levels of service that we offer and sits alongside our contracts. We welcome ideas for improving and enhancing our service and strive for continuous improvement. Our support teams are dedicated to providing exceptional standards of customer service that meet and ideally exceed the targets defined in the charter.

Standard SLA Response and Resolution targets are as follows:

- **P1 / Critical:** an event or series of events during which the entire system or business-critical functionality is completely inaccessible: Response and Resolution targets - 8 hours

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- **P2 / High:** an event or series of events that interrupt business-critical functionality or reduces/eliminates access for multiple users: Response and Resolution targets - 12 hours
- **P3 / Moderate:** an event or series of events that makes non-business critical functionality or procedure unusable or difficult to use, with minor operational impact but no direct impact on critical services: Response target 32 hours / Resolution target five working days
- **P4 / Low:** a degradation to non-critical functionality. The basic functionality still works but with errors or degraded performance. A request for information or advice or a standard pre-approved change: Response target 40 hours / Resolution target 10 working days

Initial contact with the customer constitutes the first response. Resolution is captured at the point of a solution being provided to the customer in the form of either advice provided, restoration of service, and/or a viable workaround being provided.

For all issues raised customers are provided with a unique case reference and their issue is triaged and assigned one of the above priority levels:

Premium Response and Resolution SLAs are available upon request and for an additional charge.

For Retain Cloud customers in the Microsoft Azure environment, we offer a system availability of 99.5%, excluding periods of planned maintenance.

Our customers have access to the customer portal 24 hours a day, 7 days a week. The Support Desk's standard hours are 0900 to 1730 Monday to Friday (GMT/BST), excluding Bank Holidays in the United Kingdom. At our entire discretion, the support team may be available between 0700 to 1900 to assist customers and

we can also provide an out-of-hours 24/7/365 service for P1 incidents upon request.

Retain Cloud provides Online help within the application this can also be viewed using the following URL:
<https://help.retaincloud.com/>

Where appropriate we will determine and document the root cause of issues, logging them as known issues in the service portal and within the incident case if applicable. If the Major Incident Management process has been invoked we will also log the root cause and its resolution as part of the Major Incident Report.

We analyse all service trends monthly as well as operating a Continual Service Improvement Programme which proactively supports proactively reduction of trending incidents.

We do not offer service credits as part of our service.

4.3 Online Support

We would strongly recommend using our online customer portal which is the first point of contact for all support enquiries. Over 90% of customer issues are raised on the portal which provides 24/7/365 access to log, update and view case progress. As our main communication tool, customers can add comments and upload attachments to assist with case investigation as well as using the knowledge base to access documentation, FAQs and search for known issues.

4.3.1 Telephone Support

Our Support Desk's standard hours are 0900 to 1730 Monday to Friday (GMT/BST), excluding Bank Holidays in the United Kingdom. At our entire discretion, the support team may be available between 0700 to 1900 to assist customers and we can also provide an out-of-hours 24/7/365 service for P1 incidents upon request.

4.4 Escalation Process

4.4.1 Scope

The scope of the Escalation Process will cover support Cases that have been raised, project issues that have been identified, and concerns relating to our management of customer accounts. Automatic escalation will only relate to Cases that have been raised through the Support Portal or with the Hotline Support helpdesk.

4.4.2 Support Cases

The Retain support teams are dedicated to providing exceptional standards of customer service that meet and ideally exceed the targets defined in the Retain Service Charter. Where we have been unsuccessful in meeting these standards, and where there is an active support Case that has been raised through the Support Portal or with the Hotline Support helpdesk, the Escalation Process will apply. Escalation activities will be driven by the priority that a Case was assigned when it was raised.

4.4.3 Automatic Escalation

The next escalation point will be notified at the time relative to the target resolution time for the Case stated in the table below. That escalation point will use their experience and influence to ensure that all reasonable efforts are being taken to resolve the Case. Escalation will continue until the Case has been closed and will be recorded in the Case history.

			Escalation times (relative to SLA Resolution Time) and where to			
Priority	Support Tier	Resolution Time	1 st Escalation	2 nd Escalation	3 rd Escalation	4 th Escalation
 Critical	Premium	4 Hours	-2 Hours Service Delivery Manager	0 Hours Account Manager	+2 Hours Chief Operating Officer	+4 Hours Managing Director
	Standard	8 Hours	-2 Hours Service Delivery Manager	0 Hours Account Manager	+4 Hours Chief Operating Officer	+8 Hours Managing Director
 High	Premium	8 Hours	-2 Hours Service Delivery Manager	0 Hours Account Manager	+4 Hours Chief Operating Officer	+8 Hours Managing Director
	Standard	12 Hours	-2 Hours Service Delivery Manager	0 Hours Account Manager	+6 Hours Chief Operating Officer	+12 Hours Managing Director
 Moderate	Premium	5 Days	-1 Day Service Delivery Manager	0 Days Account Manager	+3 Days Chief Operating Officer	N/A
	Standard	5 Days	-1 Day Service Delivery Manager	0 Days Account Manager	+5 Days Chief Operating Officer	N/A
 Low	Premium	10 Days	-2 Days Service Delivery Manager	+5 Days Account Manager	+10 Days Chief Operating Officer	N/A
	Standard	10 Days	0 Days Service Delivery Manager	+10 Days Account Manager	+10 Days Chief Operating Officer	N/A

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5 Information Security

At Retain, security is integral to what we do and we operate to Cyber Essentials (UK) and ISO27001 standards. We have a strict security patching methodology for operating systems and servers. In line with Microsoft vendor release patches are applied monthly. Non-security-related patches are reviewed, prioritized, and included in our SaaS release process. Retain operations and security teams assess and remediate critical security vulnerabilities within 24hrs and high-security vulnerabilities within 7 days. Any non-critical third-party software is updated as part of our secure release management process. All code scanned DAST, SCA, SAT, Penetration Tested as part of our secure development process.

Using security best practices and to ensure the confidentiality of customer data we ensure that:

- Data is encrypted at rest and in transit.
- For the Azure SQL databases, we rely upon Azure's service-managed transparent data encryption (TDE). The built-in server certificate is unique for each server and the encryption algorithm used is AES 256.
- The connection to Imperva (WAF) is only accessible via HTTPS; the minimum protocol version is TLSv1.2 the supported cipher suites are listed here <https://docs.imperva.com/bundle/cloud-application-security/page/cipher-suites.htm> (TLS1.2 and above)
- In transit, the application in Azure is only accessible via HTTPS; the minimum protocol version is TLSv1.2 and supported cipher suites supported are TLS_ECDHE_RSA_WITH_AES_128_GCM_SHA256 and TLS_DHE_RSA_WITH_AES_128_GCM_SHA256. Its only accessible to whitelisted IP Addresses from Imperva
- All secrets stored in Azure Key Vault are encrypted at rest, these keys are protected by modules that comply with the FIPS 140-2 standard.
- The password hash that gets produced by the Retains Identity framework relies on the choice of the hashing algorithm, work factor (iteration count), and the unique salt size. The salt is a randomly generated value that is different

for each user and each password and is stored as part of the hash

- We have a least rights and privilege access polices/procedures in place
- The application has a flexible security model, role based, field and record level which is configurable

Under GDPR, SaaS suppliers and SaaS customers must only keep personal data for as long as necessary and as specified to data subjects. Retain will delete all data on exit of contract within 90 days of service termination. During live services it is the customer's responsibility to ensure that any PII stored in the tool is deleted or archived upon the exit of an employee or client.

Any breach notification will notify our clients and the ICO without undue delay, but not later than 72 hours after becoming aware of a breach.

In the event of termination of the contractual relationship we will return all client data in our standard .csv format. We will do this within 90 days subject to a formal termination in writing.