



Workpro Case Management Support Services

G Cloud 14 Service Definition

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Workpro case management software is developed by CAS
- an employee-owned technology company.
www.workpro.com

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Document Information

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Intended Purpose

This is a service definition document for Cloud Support services which can be bought to support Workpro case management software. These services enhance the following Workpro Cloud Software (listed in G Cloud 14 Lot 2):

- Workpro Complaints management software
- Workpro HR and Employee Relations case management software
- Workpro Requests – FOI, EIR and DPA case management software
- Workpro Casework - case management system.

Document Sections

Section 1 - [Service Information](#) contains essential information about our Workpro support services and security.

Section 2 - [G-Cloud Alignment Information](#) details how to buy our service, and how to leave our service should the need arise.

Section 3 – [Why Workpro?](#) provides information about our company, our experience and why Workpro makes a good choice for your case management requirement.

How to Use This Document

This service definition document is an active document which means you can click on the links we provide to move around the document viewing only those specific sections you are interested in during the different phases of your G-Cloud buying process.

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2 Section One – Service Overview

Workpro Support Services are available to support Workpro Cloud Software (listed in G Cloud 14 Lot 2):

- Workpro Complaints management software
- Workpro HR and Employee Relations case management software
- Workpro Requests – FOI, EIR and DPA case management software
- Workpro Casework - case management System.

Services include planning, setup and migration, integration, training, and configuration changes or additions.

CAS can advise on which services are appropriate and the number of days required, based on our understanding of specific client needs.

Please refer to our SFIA Rate card published under our service listing for charges.

Testing is carried out as standard with any deployment.

2.1 Key Features

- Implementation planning, requirements gathering and specification production.
- Setup and Migration services, including data and document import.
- Integration services – e.g. other client systems, authentication systems, branding etc.
- Training services for System Administrators, Users and Report Writers.
- Configuration services - changes or additions to standard workflow, reports etc.

2.2 Key Benefits

- Ensures Workpro solution reflects any unique organisational requirements.
- Minimise costs by building on functionality in the standard Workpro package.
- Exceptional flexibility and scalability. Workpro can adapt to business needs.
- Investment protection through integration with any existing systems.
- Harness current data and minimise duplication through data migration.
- Adapt to legislation, business process and environment changes over time.
- Compliance with legislation, regulation and business goals assured.
- Optimise efficient use of combined systems/ data.
- Supplement internal IT resources with our expertise as needed.

2.3 Support Services

The following section describes support services we can provide to enhance or change your Workpro system during the lifetime of your contract with us, including configuration, integration or migration services.

As these services are optional, for requirements beyond the core system onboarding service. Quotes will be provided and timelines agreed prior to this work commencing. See [Service Pricing](#).

2.3.1 Planning Services

Workpro Business Analysts are experienced in gathering requirements and formalising them into specification documents. The inclusion of agreed acceptance criteria ensures a shared understanding of requirements with our customers. To help clients with the process of planning their cloud software implementation, we give access to a core system and an example configuration specification. The client compares these with their own requirements specification (if they have one) and adjusts or adds to the configuration specification as necessary.

2.3.2 Set Up and Migration Services

We offer fixed price Standard Deployment Packages which can be purchased with your Workpro software in G Cloud 14 Lot 2. This Lot 3 service covers any additional requirements beyond this standard service that you may have, including:

- Data migration – import existing case data into Workpro using agreed format. We provide a template you can use to extract data from the original system.
- Document import – we can work with you to import existing case documents into Workpro using an appropriate, structured folder format.

2.3.3 Integration Services

Workpro can be integrated with other client systems, for example, payroll, CRM, scanning systems and SMS text messaging.

- Import Core data (for example customer or employee information) automatically from a wide range of other systems, ensuring this data remains in sync with your primary data source.
- Partnership with StackOne allows easy integration with a range of HRIS systems, via their middleware service. This avoids the need to involve your IT team in manual data extraction and upload.

2.3.4 Training Services

Training services for System Administrators, Users and Report Writers. Please note that fixed price Standard Training Packages can be purchased with your system under G Cloud 14 Lot 2. Additional training can be purchased at any time during your contract with us.

Training is delivered online in manageable modules. Sessions are recorded so that users can refer back to them, and notes and exercises are provided to help users consolidate their learning. All sessions are in groups of 8 attendees.

A Workpro User Guide is also supplied with the system, accessible by an on-screen help link.

System Administrators training covers:

- Core record management including automated tasks
- Case permissions, case unlocking and user management (access and roles)
- Dashboard and report management
- Templates, document folders and file management
- Form and list management.

User training includes:

- Overviews and monitoring caseload
- Process, workflow, tasks and alerts
- All document actions
- All case actions, including adding participants, linking cases, closing and re-opening.
- Search.

Report Writer training covers report administration, development, creation and subscriptions.

2.3.5 Configuration Services

Workpro offers the best of both worlds. Standard tools for a rapid start, plus complete flexibility if you need a more tailored approach.

The Workpro Implementation Team will work with you to ensure your system reflects any unique organisational requirements. We always aim to work as closely to the standard product as possible so that customisation can be achieved quickly and cost-effectively.

Configuration services include:

- Changes or additions to standard case types
- Creation of bespoke reports to augment the standard reporting capabilities.

2.4 Support and Maintenance

Support and Maintenance services, including system upgrades. Please note that fixed price Standard Support Packages can be purchased with Workpro software under Lot 2. Additional support services can be purchased at any time during your contract with us.

We operate an ITIL compliant support operation comprising of manned help desk with backup technical resource as required.

- 24/7/365 online support portal, for logging and monitoring issues, requests and billing
- Support is also available by email or telephone through our helpdesk
- On-screen Help link always visible to users, with access to Workpro User Guide.
- Remote support can be carried out via dedicated link if required.

- Workpro is an evolving product and one system upgrade is available per year.
- Planned and emergency maintenance is included with the standard support package, including monthly patching out of hours, with users notified in advance.
- Standard Workpro application support hours are Mon-Fri 9-5, excluding the Christmas and New Year period. Out of hours cover is available – this is charged at 1.5 times our standard rate. Please refer to our SFIA Rate Card.
- Our Business Relationship Manager oversees your contract and acts as an escalation point.

Response Times

Our target resolution time for support tickets, from date of receipt, is:

	Priority	Fault Level Description	Target
	1	System non-operational and affects the majority of (>50%) users	Resolve within 5 hrs
	2	System non-operational and only affects a minority (<50%) of users	Resolve within 12 hrs
	3	Identifiable fault but system still operational, minor faults and advice	Resolve within 30 days
	4	Cosmetic issues which do not affect the operation of the system	Resolve within 60 days
	5	System enhancements, new and additional features	Resolve – agree delivery date on approval of change request
	6	Request for advice	Resolve within 10 days

2.5 Security

Workpro Cloud Hosting comes with best-in-class data security and disaster recovery as standard:

- UK-based, ISO 27001 accredited, state of the art data centres.
- Cyber Essentials Plus certified
- 24/7/365 Managed Cyber Security Service
- Double Encrypted rolling data backups
- Full Disaster Recovery (DR) to a second standby data centre.

We set up your own separate instance of Workpro Complaints in the Workpro Cloud. We have a Private Cloud option with VPN (Virtual Private Network) connections if required.

Access Controls

Workpro is a web browser based product, accessible from any web enabled device, subject to security/access permissions. Data is protected by access controls and data access is only permitted to authenticated users.

Managed Cyber Security Service

All Workpro hosted systems benefit from a fully Managed Security Service (iMMS). Artificial intelligence (AI) and next generation cyber security tools, combined with 24/7 monitoring by cyber security experts, identify and protect you from all the threats you face.

Business Continuity and Disaster Recovery

The Workpro platform is designed to be robust and resilient to most foreseeable risks.

The primary Workpro hosting environment includes full redundancy across all components. This is at both Workpro platform level (servers / firewalls / power supplies / clustered databases / etc.) and data centre level (multiple power lines into the building, UPS, back-up generators, multiple network carriers, and so on.).

Your Workpro Cloud service includes a second standby data centre for full Disaster Recovery (DR), supplementing high levels of resilience in the primary data centre.

Both CAS and our hosting partner have documented Business Continuity and Disaster Recovery (DR) Plans, within the scope of our accredited ISO 9001 quality management system and ISO27001 information security management system.

Plans are tested annually with invocation of different DR scenarios.

For more information on hosting security see [Appendix B](#).

3 Section Two - G-Cloud Alignment

3.1 How to Buy our Services

Support services for Workpro case management system can be bought with your system through Lot 2 (Cloud Software), or separately under Lot 3 (Cloud Support), according to your preference.

Our Lot 2 Cloud Software listings are as follows:

- Workpro Complaints management software
- Workpro HR and Employee Relations case management software
- Workpro Requests FOI, EIR and SAR case management software
- Workpro Casework - case management system.

Please note our additional Supplier Terms and Conditions which are also published under our service listings.

3.2 Service Pricing

We endeavour to be transparent in our pricing and to provide our service in the most cost effective way possible.

Please refer to our pricing document and SFIA Rate Card published under our service listing.

3.3 Contract Termination

If a client wishes to leave before the official end of the G Cloud contract, we require three months' notice of termination in writing (on letterheaded paper, by email or post). An exit plan will be agreed including data extract arrangements.

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 standard daily rates (see SFIA rate card).
- After contract termination, we will take the client system down and delete all client data. This will happen within a week from the client notifying us that they have extracted their data as required. We can selectively remove customer specific data sets at any point.

4 Section Three – Why Workpro?

4.1 Why Choose Us?

Workpro is developed by Computer Application Services Ltd (CAS). We specialise in case management systems for complaints handling, employee relations, information requests (FOI, GDPR, SAR, EIR) and other regulatory casework.

We supply our trusted Workpro software to public and private sector organisations throughout the UK and overseas. Product development is ongoing, and we actively seek user input to the product roadmap.

Examples of Workpro UK clients include:

- Employment Agency Standards Inspectorate
- Financial Regulators Complaints Commissioner
- NHS England
- Public Services Ombudsman offices in England, Scotland, Wales and Northern Ireland

The standard Workpro system can be adapted to fit your business needs during onboarding or later should your needs change. Your system administrators can make many changes to the system themselves, including look up lists, fields, targets and terminology, which can all be easily amended to reflect your policies and processes.

Our experienced Workpro team is also available to support you throughout the lifetime of your solution.

“The people at Workpro make a real difference. They know what they are talking about, they are reactive and responsive, and I trust that any issues will get fixed. The relationship is very important to us.”

Chris Harrison, Performance and Business Information Analyst, Housing Ombudsman Service

4.2 About Us

We are an employee-owned technology company based in Edinburgh, Scotland. The company has been developing software since 1969 and we became employee owned in 2014. A growing company, we are proud of our heritage while looking forward to the future.

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.

We endeavour to be a good corporate citizen, employer and supply partner. Appendix A provides more detail on our [Social Values](#).

5 Appendix A – Social Value

We endeavour to be a good corporate citizen, employer and supply partner. Our Social Values align with the UK government's Procurement Policy Note PPN 06/20 as follows:

Theme	CAS Social Value
Covid-19 recovery	<ul style="list-style-type: none"> Covid-19 saw an increase in enquiries from dispersed teams struggling to maintain visibility of caseload activity, with data security concerns about the use of multiple devices in remote locations. Workpro is online software that enables new ways of working as it ensures teams can collaborate efficiently on cases wherever they are, with data stored centrally in a system with robust security measures.
Tackling economic inequality	<ul style="list-style-type: none"> We have invested heavily in cyber security monitoring for all Workpro systems. All Workpro hosted systems benefit from a fully Managed Security Service (iMMS). iMMS uses artificial intelligence (AI) and next generation cyber security tools, combined with 24/7 monitoring by cyber security experts, to identify and ensure protection from threats. Workpro tools helps caseworker teams deliver better service to their customers with reduced case turnaround times and consistent responses. Workpro reporting gives management teams the ability to analyse and learn from case data so they can identify product and service improvements, and address any systemic issues. Scotland is experiencing a skills shortage in software development. Our team continues to grow and our new hybrid way of working has enabled us to recruit software developers and project managers from other areas of the UK. We regularly invest in staff training, including funding courses for recognised qualifications. Recent examples including funding the achievement of Professional Diploma in UX Design for our UX Designer, and an Open University Project Management course for one of our senior developers.
Fighting Climate Change	<ul style="list-style-type: none"> Our hosting platform uses 100% renewable energy to power their data centres and supports an initiative to convert waste heat into energy. Workpro includes a file management tool that promotes the timely removal of data and files. A robust document management regime reduces unnecessary e-storage and associated cloud infrastructure emissions, while promoting best practice data protection. Workpro enables organisations to move to more 'paperless' ways of working with the ability to send and receive correspondence electronically. We have ISO 14001 certification which helps us promote team awareness and action in reducing our environmental impact.

Equal Opportunity	<ul style="list-style-type: none">• We have a long-standing Equality Policy and taking its natural course recruitment has seen a broad base of nationalities, backgrounds and interests represented in CAS.• We are Employee Owned, meaning every employee has a stake in the business either directly or via our Employee Benefit Trust.
Wellbeing	<ul style="list-style-type: none">• Our staff are supported by a comprehensive Employee Assistance Programme with access to medical, legal, and counselling support.• All managers have undergone Menopause training and we have an appointed Menopause Wellbeing Champion.• The team has undergone DiSC Profiling and training to promote understanding of different communication and work styles and needs.• Regular VIP Awards (Values In Practice) recognise commitment to our company values. These are peer group awards, recognition of team members by the team.• We support local schools, providing IT equipment and work experience as needed.• Charitable donations are made throughout the year to employee nominated causes.• We operate an employee volunteering scheme, making 2 hours per week/1 day per month available during work time to help their choice of charity.

6 Appendix B – G Cloud Security Principles

The following gives an overview of how our Workpro service complies with G Cloud Security principles. More detail is available on request.

Principle	Workpro compliance
1. Data in transit protection	Data in transit is encrypted using https / SSL encryption with TLS 1.2 to completely encrypt case and document data, database logs and backups.
2. Asset protection and resilience	<p>UK based data centres, designed to be robust and resilient to most foreseeable risks.</p> <ul style="list-style-type: none"> • Full redundancy across all hosting components. • 24 x 7 x 365 manned security & monitoring systems • Standby Disaster Recovery (DR) environment • Your service includes overnight backups, 3-month rolling retention period and hourly transaction logs. • Adding an additional safety net, encrypted data backups are securely stored off site to a UK based data centre. • All retired storage media is wiped to DOD standards where appropriate or alternatively physically destroyed. • Annual penetration testing carried out.
3. Separation between consumers	<p>Workpro cloud hosted systems use a common hardware platform, but each Workpro application is customer specific and uses a pair of SQL Server databases for data storage.</p> <ul style="list-style-type: none"> • All processing is done in your own application instance. • All services and entry points require authentication. • Your Data is encrypted with a key that is unique to you. • Each staff member has an individual login on to the system • Group membership and selective security controls access.
4. Governance framework	<p>Both CAS and our hosting partner:</p> <ul style="list-style-type: none"> • Are ISO 270001 accredited, with fully documented policies for our ISMS (Information Security Management System). • Are Cyber Essentials Plus accredited. • Are registered with the ICO to handle personal data in the performance of our businesses in accordance with the UK Data Protection legislation. <p>Data is protected by access controls and data access is only permitted to authenticated users. Access to individual cases, case documents and other data is protected by role-based security controls.</p>

	<p>You remain the Data Controller at all times. CAS acts as a Data Processor only under your instruction. We would only look at your system under an authorised service request ticket.</p>
5. Operational security	<p>All Workpro hosted systems benefit from a fully Managed Security Service (iMMS). iMMS uses artificial intelligence (AI) and next generation cyber security tools, combined with 24/7 monitoring by cyber security experts, to identify and protect you from all the threats you face.</p> <p>Workpro Cloud Hosting includes:</p> <ul style="list-style-type: none"> • Encryption of Data in Transit and at Rest • Abnormal Access Prevention • Intrusion Detection and Prevention • Malware and Ransomware Protection • Vulnerability Scanning • Distributed Denial of Service Mitigation (DDoS) • Data Loss Prevention (DLP) • Application Defence • Penetration testing • Accredited change management procedures • Regular software patching and hardware maintenance. <p>CAS has a documented incident reporting process that includes action steps to handle critical incidents.</p>
6. Personnel security	<p>All staff are subject to formal identification and employment checks, including requirements for Baseline Personnel Security Standard.</p> <p>The CAS Company Handbook includes published policies regarding data security and breaches, individual responsibilities, and the disciplinary process.</p> <p>Both CAS and our hosting partner operate within our formal security and quality management accreditations: ISO 27001 and ISO 9001</p>
7. Secure development	<p>We use an agile development approach based on the Microsoft Secure Development Lifecycle. We conduct annual reviews against the OWASP Top 10 and address any findings or proposed improvements.</p> <ul style="list-style-type: none"> • Penetration testing of Workpro on an annual cycle • Data is protected by access controls, authenticated users only. • Development leads conduct technical reviews of specifications and application designs. • Code changes are subject to review to identify security and other issues.

8. Supply chain security	Our hosting provider does not process, store or transmit any personal identifiable information (PII) on behalf of clients. Their accredited controls and service measures relate to hosting-side management and monitoring covering organisational controls, physical controls, and platform controls. These include data centre policies, firewall policies, intrusion detection, encryption, vulnerability assessment, SIEM, and so on.
9. Secure consumer management	<p>User Admin Tools enable nominated system administrators to control access to areas of the system, determining individual user permissions – right down to case level. You may wish to restrict access to a particularly sensitive case, or only allow a manager to view his own team’s cases.</p> <p>All accounts are managed within a secured Windows domain, in a single group to which only the system administrators have access.</p>
10. Identity and authentication	<p>Workpro is a web browser based product, accessible from any web enabled device, subject to security/access permissions. Data is protected by access controls and data access is only permitted to authenticated users.</p> <p>Workpro supports Single Sign On authentication methods, including Azure AD, Shibboleth, ADFS and Okta, many of which can provide MFA (Multi-Factor Authentication). It also supports app-based 2FA (Two Factor Authentication), for example with Google Authenticator.</p>
11. External interface protection	<p>Both CAS and our hosting partner have well-established ISO27001 certifications, showing that procedures and processes exist to manage risks, including security incidents and breaches. We conduct regular risk assessments as part of our continual improvement.</p> <p>All Workpro hosted systems benefit from a fully Managed Security Service (iMMS). iMMS uses artificial intelligence (AI) and next generation cyber security tools, combined with 24/7 monitoring by cyber security experts, to identify and protect you from all the threats you face.</p> <p>Workpro Cloud Hosting includes:</p> <ul style="list-style-type: none"> • Cisco Firewalls • Restricted access to Workpro via VPN (private cloud only) • Encryption of Data in Transit and at Rest • Abnormal Access Prevention • Intrusion Detection and Prevention • Malware and Ransomware Protection • Vulnerability Scanning • Distributed Denial of Service Mitigation (DDoS) • Data Loss Prevention (DLP) • Application Defence

12. Secure service administration	<p>Workpro is designed to be compliant with the Data Protection Act and GDPR, and implements appropriate data archiving and extensive security controls.</p> <p>All Workpro hosted systems benefit from a fully Managed Security Service (iMMS). iMMS uses artificial intelligence (AI) and next generation cyber security tools, combined with 24/7 monitoring by UK Security Cleared experts, vetted to NPPV level 3, to identify and protect you from all the threats you face.</p> <p>All administrative and maintenance functions require VPN access, only available from a controlled list of locations, and granted by individual credentials. Separate credentials are then required for individuals to access admin functions within target systems. Role-based access ensures that individuals have the appropriate level of access.</p>
13. Audit information provision to consumers	<p>All case activities are recorded in the case history record of each case. System logs also record activities like authentication attempts and errors.</p>
14. Secure use of the service by the consumer	<p>Please see our Acceptable Use Policy for Workpro software, published in the footer on our website.</p>