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G-Cloud15

Access Synergy Education Management System

Service Definition

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1 Service Overview

The Synergy education management system is modular-based, allowing you to select the functionality that suits your needs such as, admissions, education support, early years childcare, benefits management and special educational needs. Whichever modules you choose, data only needs to be entered once and can be used across systems, which improves accuracy and reduces risk. It also leaves you with more time to focus on what you do best – supporting families.

Synergy has been designed to deliver a holistic overview of all local authority interactions with children, young people and families, which provides the insight you need to make key decisions successfully, resulting in much more positive outcomes for children and young people. Our comprehensive suite of products makes information sharing simple – across systems, providers, departments and even other authorities. It integrates seamlessly with other systems, including third-party software, to record and manage all aspects of children's services.

From managing school admissions and transfers to 30-hour funded childcare and vital family information, Synergy provides a well-proven solution. We've specialised in management software for children's services since 1989 and created Synergy in collaboration with education and safeguarding experts.

Admissions

Managing school admissions can be complex and time-consuming for local authorities, schools and parents. Synergy's schools admissions solution enables parents to apply for school places online, removing the need for local authorities and schools to spend days entering data. Synergy manages the admissions, transfers and appeals processes across all schools and key stages from nursery to secondary, along with transfers and in-year admissions.

The school management software records details of school capacities, applications for places, decisions and automatic allocations based on specified criteria against admissions policies. Synergy provides a powerful and flexible search and selection process, so school place applications can be quickly retrieved and updated.

Modules within Synergy's Admissions:

Admissions Management

Admissions Management is a user-friendly application that records details of school capacities, attendance applications, appeals and placements. Offering a comprehensive online schools admission system, Synergy allows for powerful and flexible search and selection of school place applications, efficient bulk processing based on the admissions criteria for either the local authority or the individual school, and it can run stand alone or as a part of the integrated suite of software.

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Synergy Parent Portal

Parents can apply for school places online using the user-friendly Synergy Parent Portal, which can also be accessed on mobile devices for busy parents on the go. Parents can view all the information they need and make their preferences quickly with validations in place to help them enter the correct information. Parents are kept up-to-date with their application in the portal and are able to accept/decline offers and appeal decisions.

School Access Module

Using Synergy's school access control system, schools can view all applications to them, including all parent-supplied information via the Parent Portal. Schools are able to securely download all pupil information for import into their Management Information System at the end of the enrolment process.

Own Admissions Authority Schools can rank applicants online with the local authority able to see this in real-time. Primary Schools are able to see whether their pupils have made preferences, and can support parents where necessary.

Integration to the Case Management module allows for SENCOs and school staff to make requests and provide information via forms chosen by the Council.

Geographical Information System Software

The Geographical Information System (GIS) software retrieves catchment area data for the applicant and can generate catchment based preferences. Using GIS for school management gives your school an online distance measurement, in straight line route, shortest calculated route and safe walking routes, including details of catchment areas and nearest school type details.

SEN

The SEN module helps local authorities handle the complex provisions for children with special educational needs in a fully web-based Case Management solution.

Customisable workflows allow for the procedures of each authority to be standardised and automated, helping to maintain quality while complying with the statutory timescales of each SEN process. This is also flexible, allowing for Council staff to adapt to changing circumstances or statutory frameworks quickly and effectively, without supplier intervention.

When used alongside our Education Support modules such as Sensory Support and Educational Psychology, a highly detailed single view of the child is provided. This also offers the ability to branch SEN workflows to and from other teams, delivering holistic and integrated processes with enhanced visibility of each child's circumstances and needs.

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Integration to the School Access Module provides further benefits, allowing for school-based professionals such as SENCOs to submit advice directly into the SEN module, while custom evidence submission forms can be published to the Synergy Web module for the inclusion of parent/carer contributions.

The Synergy Professional Portal and Contributions functionality is also used to integrate third-party professionals into the SEN process, giving Councils the ability to seamlessly request and receive advice to be included in assessments, reviews and more.

Transport

Built on the Access Evo platform, Synergy Transport has been comprehensively designed to streamline home to school transport management and improve the experience for families and transport teams alike.

This includes a wealth features, including an online Transport Application process that allows parents and carers to request transport either as part of their child's admissions application or as a standalone request. Automated eligibility calculations with optimised route creation deliver vastly increased efficiency savings, alongside integration capability to finance, fleet management and commissioning systems for a holistic overview of all aspects of Transport management.

Synergy Transport also delivers key management tools for routes, staff, vehicles and contracts. Child records integrate seamlessly with the Admissions and SEN modules, creating a single source of information shared across education services and beyond.

Early Years

Early years education and care providers often find themselves overwhelmed by administrative tasks, with valuable time and resources lost to inefficient processes. Synergy Family Information Services (FIS) streamlines these operations, enabling you to work more efficiently while delivering enhanced support to the parents and carers you serve.

Modules within Synergy Early Years

Early Years Funding

The Early Years Funding module is a comprehensive platform that brings together provider management, funding administration, and child record management within a single, web-based environment. The system operates through Registration and Provider records that capture organisational details and Ofsted information, containing service specifics such as operational hours, fees, age ranges, and availability.

Sophisticated funding calculations are supported for all current and new entitlements including working families, deprivation supplements and EYPP. ECS checking service

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integration allows for Councils to determine and update eligibility for children and families on demand, while the integrated Ofsted feed allows for the seamless maintenance of childcare service records. Parents and carers are also able to utilise the ECS service to check details for 2yo and 30H funding codes via their Synergy Web account.

The streamlined funding operations manage the complete payment journey from initial estimates to final settlement through one integrated system. Providers submit headcount data via the responsive Provider Portal, triggering automatic eligibility verification for programmes like EYPP and DAF.

Provider Portal

The Provider Portal allows Early Education Settings to access a secure web site and submit details of their termly estimates (*where applicable) and actual headcounts, adjustments and sufficiency information directly into Synergy. The process alone can save countless hours of manual entry and removes the possibility of typing errors on behalf of the administrative staff. A data checking and approval mechanism replaces the data entry exercise to ensure the highest possible quality of records.

Training and Booking

Synergy's Early Years Training module enables councils to comprehensively manage training courses from creation through to completion. Each course instance captures detailed information about venues (with addresses, contacts and facilities), tutors (including names, contacts and costs), multiple sessions (with dates and times), and attendees (tracking booking status, cancellations and attendance). The system allows councils to control which courses are visible online to organisations, manage qualifications associated with courses, and adjust schedules as circumstances change. Attendees can be managed manually with flexible allocation and status tracking.

Through the provider section of the Synergy Web Portal, registered users from early years organisations can manage their staff details and book them onto available training courses. The portal features configurable search facilities that allow councils to define search parameters and customise the information displayed in course lists, with only courses marked as 'available online' shown by default. When portal users submit staff bookings, these automatically appear in the back-office system with a 'requested online' status, triggering notification emails to the council team who can quickly access the relevant course record using built-in query tools.

Family Information Services

Synergy’s flexible Family Information Service (FIS) solution enables local authorities to manage childcare information and service directories, ensuring the right data is available to the right people at the right time. Secure and comprehensive, the system can be configured to suit your needs.

The FIS solution provides local authorities with:

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- An online, easy-to-use directory for early years' childcare information management and services.
- Customisable parent/carer search route and search result configuration
- Integrated mapping features, including radial searches
- Instant data exchange of provider information with Early Years records

Our multi-purpose online directory enquiry allows parents/carers to access important data and register interest in services. This spans across service providers, staff and contacts and general enquiries. This module allows categorisation by type, method, source or requirement, to improve efficiencies and show the right contacts to the right people, at the right time.

Parents and Carers can also utilise 2-year-old and 30 hours checking facilities that connect to the government's Eligibility Checking System and provide an instant result. Customisable guidance information on the next steps for them to take reduce time-consuming referrals and provide clarity and efficient services to the public.

Governors

We know that managing information for your governing body is time consuming and sharing accurate information within the statutory timeframe can be challenging. Our Governors functionality improves the accuracy, accountability and value of your governing body administration. It offers streamlined workflows and can record meeting minutes, store training details, automatically generate letters and more. It also stores full details of a governor's history as well as their correspondence and training records.

Free School Meals

Our Free School Meals module delivers a straightforward way for local authorities to manage and allocate free school meals, clothing vouchers and other grants and benefits. It confirms eligibility in real-time so parents don't need to prove eligibility with a benefit receipt or use a paper-based application form. The online application form also means no data entry for local authority staff, and schools are notified automatically when the application is approved.

Family Hubs

The Family Hubs solution enables local authorities to manage centres effectively while empowering users to oversee all activities and sessions. By sharing data seamlessly with Synergy, authorities gain a comprehensive view of each family and their engagement across centres, supporting more informed and coordinated care.

The solution ensures that 'projects' (groupings of activities that work towards common outcomes) can be shared across multiple centres without duplication, and further the activities that run within those projects. This ensures that local authorities have a simple but effective reporting structure, and a structure that is easy for users to follow and work

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with. When scheduling sessions of a given activity, familiar tools are provided that allow recurring sessions to be easily scheduled.

Synergy enables many different types of events to be recorded as part of the standard offering and configuration. Supported event types include Phone Call, Visit, Meeting, Case Note, Email, File Attachment, Manager's Decision, Contact Record and SMS Text Message. Each is equipped with common and dedicated fields to support recording the event, including rich text fields to allow the user to highlight relevant details as needed.

Education Support Services

The Education Support Services module encompasses a wide range of local government functions through dedicated functionality suited to the needs of each service within a modern, user friendly Case Management solution. This includes (but is not limited to) Exclusions, Educational Psychology, Performance Licenses, Sensory Support, Education Welfare, Penalty Notices, EOTAS and PEPs.

The ability to create customised workflows that incorporate ESS's dedicated support for its variety of services enables Councils to develop best-practice processes suited to them. Features such as 'Send to Many' allow work to be conducted in bulk as well as individually, while Family records allow users to view and act upon important information related to each child.

Additional functions include the ability to communicate with stakeholders via email, letters and SMS, record visits, phone calls and case notes, as well as attach files to each record. With each service utilising the Case Management alongside the SEN and Family Hubs modules, a holistic and encompassing single view of the child is created, granting permitted users a wealth of information of each child's circumstances

Local Government (LG) Finance

LG Finance is a comprehensive, cloud-based finance platform designed for local authority operations, providing enhanced control, visibility and automation across all financial processes. Built on our modern Evo architecture as a full SaaS offering, the platform delivers web-based access from any device whilst eliminating legacy infrastructure dependencies. Operating as a unified finance database, LG Finance manages the complete financial lifecycle from budget allocation through to billing, payment and reconciliation. The platform features dynamic finance code management allowing flexible configuration across multiple dimensions, a unified financial view consolidating all information in one interface, and the ability to preview and adjust invoices before generation—preventing errors proactively rather than through costly correction cycles. Automated calculations and validations remove administrative burden whilst ensuring accuracy and compliance, with the system automatically recalculating when circumstances change without requiring manual intervention.

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The solution integrates seamlessly with existing corporate systems through its API-first architecture, supporting connections with general ledgers, budgeting systems and operational platforms whilst maintaining data quality throughout. Digital self-service portals provide stakeholders with 24/7 access to financial information, reducing queries whilst improving transparency. The platform is locally configurable, enabling authorities to respond to regulatory changes and policy updates through configuration rather than costly development, with comprehensive reporting capabilities supporting both statutory returns and custom analytics. Real-time dashboards and budget monitoring enable proactive management across the organisation, transforming financial operations from reactive fire-fighting to strategic control whilst meeting all statutory requirements.

Education-related finance activity, such as SEN funding, Early Years Funding, Transport and Penalty Notices will be managed from within the applicable CYP modules. CYP will integrate with the wider LG finance solution so that users can perform their tasks within their day-to-day areas and record the funding allocation / payment amount or penalty notice issue (process dependent), and then submit this to LG Finance for recording and integration with corporate finance.

Reporting

A wealth of reporting options are made available to local authorities in conjunction with Synergy. Our philosophy is that the information recorded in Synergy is your data, and is accordingly fully accessible for reporting and data warehousing tools.

As an additional benefit, when using SQL Server Reporting Services the Council utilise the supplied Report Model, which removes the need for users to understand the underlying database structure and in turn, enables simple 'drag-and-drop' of the required fields into the dataset used for the report. This enables new members of the reporting team to quickly access their required data and build reports, while also offering system users without extensive reporting experience the ability to build reports.

Welsh Specific Requirements

Synergy provides comprehensive support for Welsh-specific education requirements. This includes optional Welsh language configuration for the public-facing Synergy Web Portal, allowing parents and carers to view and switch between English and Welsh languages as required, as well as the ability to request Admissions communications in their language of choice.

Additional Learning Needs, EOTAS and Transport functionality are provided, ensuring full current and future compliance with Welsh statutory requirements.

Synergy Evo

Access Evo is our AI-enabled software platform that integrates artificial intelligence features across our solution portfolio including Synergy and all associated solutions. It is

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designed to empower users to achieve more by automating routine tasks, providing instant insights, and giving them the freedom to focus on more important functions.

Access Evo is the evolution of our local government services for Children and Young People. The Evo Suite will provide a single, centralised location for not only our existing modules, but a wide range of new developments that will deliver further efficiency and cost saving benefits to our user community. Evo will enable Access to deliver these improvements more responsively than traditional software release cycles; once a feature is ready for deployment to production, it will need only to be enabled, minimising down time for customers.

As a fully web-based, user-friendly platform, Evo is also more accessible for users to engage in local government education services on a variety of devices and locations, with WCAG2.2AA compliance across the solution.

The Synergy Evo upgrade also gives customers access to the following additional features:

- **Access Identity**: Utilises the OpenID connect protocol to provide Single Sign-On (SSO) across your Access Evo solutions.
- **Access Copilot:** Harness the power of AI with Copilot. Copilot acts as the user's personal assistant. Answering questions based on available data and enabling data-driven decisions to be made quickly.
- **Access Feeds:** A personalised, intelligent feed of tasks, events, and alerts that prioritises a user's workload, helping them stay focused on what matters most.
- **Collaborate:** Our document sharing and project communication tool.
  Collaborate helps customers put all their documents in one place and enables them to automatically communicate any updates across the organisation.
- **Applause:** Access Applause and its simple and speedy peer-to-peer appreciation features make recognition easy. It encourages the behaviours that align to your mission and values, and rewards people in a way that encourages a cycle of positive momentum. With studies showing that 39% of employees don't feel appreciated at work and 65% wish they had more feedback, investing in employee recognition software is essential for businesses looking to improve their employee engagement and retention, and drive higher productivity.
- **Engage:** Customise your ideal solution, from flexible employee benefits and discounts, reward and recognition technology, internal communications tool or a combination, for the complete employee engagement solution.
  Our platform helps you to:
    - Deliver a wide range of employee perks and benefits tailored to your company values.
    - Personalise, allocate and recognise rewards and achievements
    - Foster a vibrant organisation culture through seamless internal social communications.

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Core Benefits include:

- **Increased Productivity:** Automates day-to-day tasks, leading to significant productivity gains (some early adopters reported a 50% reduction in administrative tasks).
- **Enhanced Security & Privacy:** Operates with a 3-Tier Security Model that ensures all customer data remains within a private, secure environment and is never used to train external AI models.
- **Informed Decision Making:** Uses AI and analytics to bring together previously siloed data, enabling users to gain deeper insights and make smarter decisions with natural language prompts.

Our additional options for Synergy are detailed below.

Access Connect

Access Connect provides a highly secure and persistent connection to the Access Hosted Platform, allowing for in-house Council reporting teams to connect to Synergy databases and extract the data they need. This is compliant with Windows Server and Desktop architecture, empowering on-premise data warehouses, reporting solutions and data analytics without the need for supplier intervention.

Access Data Platform

With the wealth and diversity of information and data available across Access products, Access is delivering a state-of-the-art Business Intelligence and Reporting platform. The ever-growing volume of data spread across our solutions, both structured and unstructured requires a sophisticated and scalable proposition. Not only will the platform surface valuable and timely data insights, but will also provide sophisticated predictive analytic models and explore AI capability to enable customers to drive real value and service improvements. Access has a working partnership with Microsoft to re-imagine our analytics capabilities using the power of Microsoft Fabric.

This innovative digital approach integrates data movement, processing, transformation, real-time event routing, and report building, all within a single environment and empowers users to unlock the potential of their data.

Synergy API

The Synergy API is a REST API which uses secure HTTPS requests to populate information about a child/young person either to or from records in Synergy. This can be developed by authorities or through the Access group in conjunction with any compliant external suppliers to enhance the single view of a child and increase the efficiency of local authority processes.

SysTalk

SysTalk underpins the vision of an integrated children's service; it can map data from multiple systems into a single record for each child. SysTalk lets you load, cleanse and

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deduplicate information from a variety of sources and a range of file formats. This allows you to easily and effectively update a child's core record on Synergy.

School Data Imports

Synergy supports an integration with Wonde, a provider who specialise in the collection and onward provision of school MIS data in order to deliver scheduled imports.

Wonde's available dataset includes:

- All On Roll Students
- Rolling 3 months of Leavers
- Rolling 3 months of Sessional Attendance marks for both on roll and leaver cohort
- Rolling 3 months of Exclusions/Suspension records for both on roll and leaver cohort

This integration can be run on a regularly scheduled basis as defined by the Council, allowing a weekly or daily import of the data. Wonde manage the integration with the schools, significantly reducing effort on data sharing agreements and interface configuration.

Automated Imports

Scheduled imports of other data is fully supported via our Automated Imports module that automatically picks up files from a user-specified location and runs them through the Systalk import process. This allows open-ended integration with external systems, as anything which can generate a XML or CSV export of data can have that information automatically brought into Synergy on a scheduled basis. Users configure and save the intervals for when the import should run, mapping criteria, and any validation rules. These are then saved, ensuring that configuration is only needed once.

Access NotesCentre

Access NotesCentre is our AI-powered solution designed to dramatically reduce the time practitioners spend on administrative tasks—currently up to 60% of their workday. Using voice dictation, typed, or pasted text, it intelligently organises and summarises unstructured content into professional case notes using predefined templates. Built on a private Large Language Model specifically trained in local government services terminology, NotesCentre is tailored to each council's local context and nuances, ensuring secure, ethical AI that inspires confidence.

The solution works seamlessly across smartphones, tablets, and laptops with offline capability, automatically populating the correct forms and fields. NotesCentre can also record meetings, identifying speakers and extracting key actions and decisions. It can generate multiple outputs from a single input, such as formal minutes, accessible summaries, or translations into different languages, all while keeping the practitioner in control with preview and editing capabilities before committing content to the system.

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2 Onboarding

Access Implementation Methodology (AIM)
Our consultants follow a 4-phase, 12-step process and we propose a scale of project, management and administration that's appropriate for your specific needs. From evaluation, planning and design, through to implementation of your business solution.

Phase 1, Pre-project planning

Step 1: Needs analysis
After detailed consultation we will clearly define your needs in a proposal document that identifies the benefits you will experience by updating your systems.

Step 2: Solutions demonstration
We will take you through a tailored demonstration of your proposed solution and work with you to agree which elements will be included in the initial project. We listen and take account of all your feedback and will provide a quotation outlining the anticipated cost of your project.

Step 3: Sales handover
Having finalised the project's scope and agreed commercial terms, we prepare a handover document from sales to the project team who will partner you throughout implementation. They will meet with all appropriate members of your team to ensure continuity throughout the process.

Phase 2, Configure & Install

Step 4: Definition
The Access project team will work with you to define the structure and control processes that will guarantee the success of your project. Documents that we provide you at this stage will cover all your project objectives, the full specification and success criteria. This gives total clarity over individual tasks and responsibilities to ensure you're fully informed going forward.

Step 5: Solutions workshops
This step helps your project team become fully immersed in the proposed software. We map business processes to functionality so that you can understand how the solution will look and feel.

Step 6: Confirmation of requirements
Following your feedback from the solutions workshops, we will confirm the detailed actions and solution components necessary to meet the project success criteria we identified earlier.

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Phase 3, Training

Step 7: Configuration

The components identified in Step 6 are delivered and a User Acceptance Test (UAT) system is built ready for you to carry out a pilot test. We configure and tune all the variables within the system to match your specific requirements.

Step 8: User Acceptance Test (UAT)

The UAT is conducted in a workshop environment for your staff against an agreed test plan. At the end of this step you will be ready to go live.

Step 9: Education

With a fully designed, installed and tested system now in place, we will train your staff on all relevant areas of the software. We are highly skilled at adapting our training to the learning styles of each of your staff members. We can train all of your staff or, if preferred, we will train your in-house.

Phase 4, Support

Step 10: Go Live

The test system is converted into a live working environment ready for the processing of real-time business transactions. This is managed by a pre-agreed go live check list to ensure all possible circumstances are considered and addressed. We will be on-site to answer your questions and support your users throughout this time, helping them to get maximum clarity and impact from the software as they become increasingly confident.

Step 11: Support handover

We prepare a handover document and deliver it to our ongoing support team. This document contains all the information our support consultants need to answer any future queries you may have.

Step 12: Post project review

Your experience is extremely important to us. Shortly after you go live we will request feedback on your experience of the implementation process to help us further refine our delivery processes. We then agree sign-off for the project.

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3 Additional Service Options

The table below highlights the additional value added services that our consulting teams can provide. Please take some time to review these.

Data Services Consultancy	Ad hoc data services requests
Report Writing	Ad hoc report writing requests
Full Synergy Healthcheck	Evaluation of the Customer's current Synergy usage, configuration and processes with suggested changes and process adjustments
Application Report Training	Detailed knowledge of the reporting capabilities from the synergy system for SSRS reporting
Local Government Viewers	Integration between Mosaic, Synergy and Core+ - a platform for interoperability between LG systems
FlexPoints	Access FlexPoints are a cost-effective, flexible way to easily access and consume value added services including customisation, training, integration, analytics or reporting, as your business needs evolve. Access FlexPoints provide a simple way to create an allocation of points that you can call on at any time to spend on Access services. Having a banked allocation of Flexpoints provides the reassurance that as your business needs evolve you can use them to extend and modify your use of the technology.

4 Service & Support Management Details

Support Commitment

We recognise that the systems, software and services we supply may be critical to the well-being of your business. Our aim is to ensure that you have continuous operational capability from our products. We will help you to achieve this by providing efficient support, resolving the majority of tickets at first-line contact.

We will help you maximise your return on investment by providing the best in technical assistance, advice and customer care. We own your support queries and will ensure that they are resolved as promptly and efficiently as possible.

Support will be provided in accordance with our Synergy Service Level Agreement.

We provide 3 main Customer Success Plans for Access Synergy as detailed below.

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The Standard Plan
As a Standard Plan customer you benefit from faster response times and can access our support teams via telephone and live chat, as well as through our Customer Success portal. To help your team be more productive, you are provided with continued access to our e-learning content as well as a programme of Success webinars, designed to keep you up to date with new features and share best-practice advice and guidance.

The Premier Plan
Our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your Customer Success Manager will get to understand how you're using the technology and will advise you on how to get more from it.

The Premier+ Plan
Our Premier+ Plan provides the highest level of dedicated support to maximise your technology investment. Building on the Premier Plan benefits, you receive more frequent consultations with your designated Customer Success Manager and also benefit from a Lead Technical Support Engineer who prioritises your complex and business-critical issues, ensuring rapid resolution when it matters most.

Full details of our Customer Success Plans can be found here Access Customer Success Plans.

Get to know our knowledge base
Knowledge Base is our huge database of commonly asked questions, articles and videos. All you need to do is Register and Login and you can find the answers you need any time of the day.

The advanced search function not only searches articles from Knowledge Base, but links up with our Community hub to display the topics that you need. So you've got everything you need all in one place.

Can't find the article to answer your question? Not a problem. Each article links to our Community so you can ask a question, or to raise a case with the Access team.

Got a question? Ask our Community
Community connects our customers together to help them solve problems and share how to get the very best out of their Access products.

Our customers know more about using our products in their jobs than anyone else. Community gives you the chance to receive – and share – friendly expert advice that goes beyond normal customer support. Discover best practice hints and tips from peers in your industry to help you make the most of your experience with your Access product.

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Each of our products has its own dedicated Community, so you can get straight to the discussions that matter to you. No unnecessary searching needed.

If a question can't be answered by Community a member of the Access team will reply. We'll make sure that no query goes unanswered.

5 Account Management & Customer Success

With over 160,000 customers using products supplied by the Access Group we have a large team involved with ensuring that our customers are able to build on their investment with Access.

This includes the Customer Success team who are specialists in specific products whose role is to ensure that our customers on Standard and Premier Success plans benefit from educational webinars to ensure that you are always taking advantage of new functionality and most importantly continuing to adopt best practice in the day to day use and set up of the software.

Our Account Management team work with our customers specializing in vertical sectors or specific products. Depending on the complexity of the customer these are either office based using the latest technology to provide our customers with the highest possible levels of service or will visit sites for face to face meetings.

Our Account managers work with you keeping our customers informed on the way emerging technologies can help their business. They prepare briefings on the business, technical and financial benefits of technology and collaborate with customers to ensure the customer is aware of the breadth of software and support that Access can provide.

6 Backup and Disaster Recovery

The solution has been designed to cater for disasters ranging from a database restore through to a complete datacentre outage.

Backups are stored within a multi tenancy data vault and are encrypted at rest. The design of the architecture means that all data is simultaneously available in both the primary datacentre and the secondary datacentre meaning data is always backed up to another geographically diverse site.

All Servers are backed up on a daily basis at 10pm. These backups go directly to storage in the DR Datacentre to ensure off-site availability.

All systems hosted within DC2 are backed up as standard with the following retention policies:

- SQL Servers
    - Full backups every Saturday retained for 3 months except last Saturday of the month which is retained for 6 months **
        - Differential every night (excluding Fri & Sat) retained for 1 month

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        - Logs every 15 minutes retained for 1 month.
            - **Pay data full backups retained for 5 years
- Non-SQL Servers
    - All non-SQL servers have a standard retention of 30 days

All backup data is replicated between Data Centres to ensure data is available in the event of the loss of a site.

Note: For SQL server backups only the database backed up, anything stored outside of this on these servers is exempt and cannot be restored.

Retention for backups:-

15-min SQL	28 days
Daily	28 days
Weekly	3 months

Backups will be deleted upon client request following termination of contract, otherwise they will be aged out via retention policies.

The solution has been designed to deliver Recovery Point Objective (RPO) and Recovery Time Objective (RTO) using the following definitions:

- RPO is the maximum time period in which data might be lost.
- RTO is the duration of working time within which data should be restored after a disaster. This time starts from when a support call is logged with Access.

Ransomware/Malware
In the event of a server or service being infected then a system will need to be restored from a backup taken prior to the infection taking place (if available), in this event RPO & RTO times are not applicable.

Standard Restore Testing
We undertake restores automatically on a weekly basis via an automated process to a separate server to ensure that the backup is consistent and valid on restore.

DR Testing
We run a full DR test on a 6 monthly basis, this is a non-invasive test where we bring the DR site up in an isolated fashion to ensure the services recover (Zerto allows us to do this without bringing the production environments down).

As standard all systems will be configured with Bronze DR, in the event of a disaster the system will be recovered within a secondary Data Centre from backup with the following RPO and RTO SLA's. No DR testing is included within this option:

- SQL Server
    - 15 minute RPO
    - 12 Hour RTO

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- Non-SQL Server
  - 24 Hour RPO
  - 12 Hour RTO

SQL Server
SQL Server Full Database backups are taken overnight as well as having SQL transaction logs taken at 15 minute intervals. This allows a database to be restored to an overnight position or to be restored to a chosen point in time within the day.

Frequently a database is restored following a user accidentally changing lots of data so the RPO does not always apply as the user may have changed the data several days ago, however the solution has been designed with a maximum RPO of 12 hours and a RTO of 6 hours.

Single Virtual Machine Failure – IIS or RDS Server
In the unlikely event of a single virtual machine (VM) failing (e.g. the IIS VM ceases to respond but the other VMs are still functioning correctly) then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed so that the files on an IIS and RDS server are fairly static with an RPO of 12 hours and a RTO of 6 Hours.

Single Virtual Machine Failure – SQL Server
In the unlikely event of the SQL Server virtual machine (VM) failing then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed with an RPO of 12 hours and a RTO of 6 Hours.

Complete Primary Datacentre Outage
In the unlikely event that the primary datacentre goes completely dark where all VMs are lost or there is no internet connectivity an investigation period will be undertaken for 2 hours to determine the cause and decide if a datacentre promotion is required to make the secondary datacentre the primary one. Once this decision has been made the solution has been designed with an RPO of 12 hours and a RTO of 12 Hours 'Optional' Customer Copies of Backups.

7 Business Continuity

The Access Group's full and most up to date business continuity plan can be requested by emailing buyer.enablement@theaccessgroup.com

8 ISO27001 Accreditation

The Access Group holds ISO27001:2022 accreditation across the entire organisation. This independently verified certification demonstrates our commitment to protecting your data. Maintaining this accreditation requires us to demonstrate effective security

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controls, regular staff training, and documented processes that are tested through independent annual audits.

9 Development Life Cycle

Access Synergy has a detailed roadmap of improvements driven by customers, statutory requirements and our own roadmap.

We take a partnership approach to developing and refining our product roadmap and delivering on the promises we make. This includes individual meetings with our customers and active participation in user groups.

The developments set out in the roadmap are the direct results of this partnership approach and reflect individual specifications refined through this rigorous process. UI/UX prototyping tools form a critical part of this process, allowing wireframes and example user journeys to be demonstrated to our customers at an early stage, gaining valuable feedback before development begins.

This allows us to ensure that what we develop meets the wider needs of our customer base and provides users with the opportunity to help shape the end product.

10 Technical Requirements

There are no server based scripts or executables which need to be run remotely from the client. There are also no components which require client side installation.

Web based functionality is supported on the following browsers (including mobile variants):

- Microsoft Edge
- Firefox
- Chrome
- Safari

Owing to the way most browsers now auto-update, our testing can only practicably focus on the most recent version of the browser publicly available at the time of testing a development item. As part of our regression and release procedures, wider application testing is performed to ensure continued compliance.

11 Service Constraints

Where Access is providing managed hosting services, the agreed threshold for application availability through the Access Hosted system in any month is 99.5%.

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Maintenance management: Downtime due to maintenance is very infrequent and is run outside of normal working hours with all customers being informed in advance to minimise disruption.

Planned maintenance: We will advise customers 5 working days in advance of a 'normal' change.

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