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G-Cloud15
Access Local Government Finance
Service Definition

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1 Service Overview

Overview

Local Government (LG) Finance is a comprehensive, cloud-based finance platform purpose-built for local authority operations. Designed to address the complex financial management challenges facing modern public sector organisations, the solution provides local authorities with enhanced control, visibility and automation across all financial processes. Built on our modern Evo architecture as a full Software-as-a-Service (SaaS) offering, LG Finance delivers web-based access from any device, eliminating the infrastructure dependencies and accessibility constraints of traditional systems whilst providing the robust functionality required for statutory compliance and effective budget management.

Complete Financial Management Platform

LG Finance operates as a unified finance database providing a single source of truth for all financial data across your operations. The platform manages the complete financial lifecycle from budget allocation and commitment through to billing, payment and reconciliation, ensuring that all financial information is captured, validated and accessible throughout your organisation. Finance teams can record data once and access it wherever needed, with automated workflows ensuring consistency and accuracy across all processes. The system maintains complete audit trails and comprehensive data governance, supporting both operational efficiency and regulatory compliance.

Enhanced Financial Control and Complete Visibility

LG Finance transforms financial management by providing unprecedented control and visibility across all operations. Finance teams gain complete control over financial interfaces, with the ability to view, manage and re-extract accounts receivable and payable files directly through the system interface without dependency on external support. The platform's dynamic finance code management allows councils to configure codes through a flexible matrix supporting multiple dimensions including service type, department, cost centre and project code, with the ability to update and reapply codes across all commitments without disrupting operations or requiring re-entry.

The unified financial view consolidates all information into a single comprehensive interface, eliminating the multiple screen navigation typically required in legacy systems. Finance teams can access comprehensive information on planned and actual expenditure, billing schedules, payment status and budget positions all in one location. This complete visibility enables proactive budget management, with service directors able to see the complete financial position in real-time, and Chief Finance Officers gaining immediate access to financial positions without waiting for month-end processes. The transformation from reactive fire-fighting to proactive management represents a fundamental shift in how local authorities can control their budgets.

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Streamlined Invoice Management

One of LG Finance's most powerful capabilities is its comprehensive approach to invoice management, addressing one of the most significant pain points in local authority finance operations. The platform enables finance teams to preview invoices before generation, allowing corrections and adjustments to be made proactively rather than requiring the costly and time-consuming cycle of invoice rejection and rework. This preview capability prevents billing errors before they create problems, eliminating the substantial annual overpayments and corrections that create financial uncertainty and administrative burden.

The solution provides flexibility for individual invoice generation, enabling invoices to be created for specific customers or suppliers without waiting for batch processing cycles. This capability is particularly valuable for urgent situations requiring immediate response, where finance teams need to resolve matters quickly without being constrained by system limitations. Manual billing flexibility extends to standalone adjustment invoices, which can be created with custom explanatory text for scenarios such as credit notes, corrections or write-offs without requiring complex workarounds. This flexibility ensures that finance teams can manage the full complexity of real-world local authority billing whilst maintaining complete accuracy and audit trails.
For service directors, this means handling urgent financial matters immediately without bureaucratic delays; for Chief Finance Officers, it represents the prevention of overpayments through proactive validation, reducing external audit findings; and for finance teams, it eliminates the burden of reactive corrections and disputes.

Automated Financial Calculations and Validations

LG Finance removes the administrative burden and error risk associated with manual financial calculations through comprehensive automation. The platform automatically applies financial rules and validations based on your configuration, ensuring consistency across all transactions without requiring manual intervention for routine processes. Automated charge calculations link services directly to rates and pricing structures, with the system generating accurate billing amounts based on usage, time periods or other criteria you define.

The system automatically performs complex calculations and apportionments based on your configuration, including budget allocations, cost sharing arrangements and financial adjustments. Critically, no manual updates are required when circumstances change—the system recalculates automatically, ensuring accuracy whilst maintaining full compliance with financial regulations and internal policies. This automation reduces the manual workload, eliminates errors from manual calculations, and ensures accuracy across all financial activities. For operations teams, it means freeing staff time from administrative burden; for finance operations, it provides automated validation that prevents errors and ensures compliance with external auditors.

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Digital Self-Service and Stakeholder Access

LG Finance integrates with digital portals providing 24/7 self-service access to financial information for citizens, suppliers and other stakeholders. This digital access reduces queries to customer service teams whilst empowering stakeholders with transparency and visibility of their financial interactions with the authority. External parties can access their invoices, payment schedules, account statements and other financial information through intuitive self-service interfaces without requiring contact with finance teams for routine enquiries.

The platform's supplier portal operates on the same Evo platform as LG Finance itself, creating a unified architecture that simplifies technical implementation and ongoing maintenance. Suppliers can submit invoices digitally, track payment status, and access their financial information through self-service capabilities. For Heads of Business Intelligence, this unified architecture represents a significant reduction in complexity and ongoing support requirements compared to solutions requiring multiple integration layers.

System Integration Capabilities

LG Finance is designed with comprehensive integration capabilities to connect with your existing corporate systems. The platform's API-first architecture enables seamless data exchange with external systems, supporting integration with operational management platforms, financial ledgers, budgeting systems and other council applications. These integration capabilities ensure that LG Finance can operate as part of your wider technology ecosystem whilst maintaining its role as the authoritative source for transactional financial data. The platform supports standard data exchange formats and protocols, enabling connection with diverse systems whilst maintaining data quality and integrity throughout.

Integration with your general ledger ensures that all financial transactions flow seamlessly between operational and corporate finance systems, providing complete visibility and reconciliation. The platform supports both real-time and batch integration patterns, allowing you to choose the approach that best suits your technical architecture and operational requirements.

Flexibility Through Configuration

The platform is designed to be locally configurable, enabling councils to adapt to annual changes and policy updates through configuration rather than requiring costly custom development. This configuration-based approach means that authorities can respond to regulatory changes, adjust to local policy decisions, and refine their processes without being dependent on external developers or facing lengthy implementation cycles. The flexibility extends across the entire platform, from finance code structures to calculation rules to reporting requirements, ensuring that the system can adapt to your evolving needs.

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Configuration capabilities include defining your own chart of accounts structure, establishing approval workflows, setting validation rules, configuring pricing and charging structures, and creating custom data fields to capture information specific to your authority's requirements. This flexibility ensures that LG Finance supports your processes rather than forcing you to adapt to rigid system constraints.

Comprehensive Reporting and Analytics

LG Finance provides extensive reporting capabilities covering all aspects of financial operations. The platform supports statutory returns and regulatory reporting with automated data validation ensuring accuracy and compliance. Custom reporting capabilities enable finance teams to create tailored reports for different audiences, from detailed operational reports for finance practitioners to executive summaries for senior leadership and members. Real-time dashboards provide immediate visibility of key metrics, supporting proactive management and informed decision-making across the organisation.

Budget monitoring reports provide clear visibility of commitments, actuals and variances, enabling budget holders to manage their resources effectively. Forecasting capabilities support financial planning and scenario analysis, whilst aged debt reports and cash flow analysis support treasury management. The platform's analytics capabilities enable you to identify trends, exceptions and opportunities for improvement across your financial operations.

Supporting Digital Transformation

For councils pursuing digital transformation strategies, LG Finance aligns perfectly with cloud-first approaches and modern technology standards. The platform's cloud-native architecture provides the modern foundation that digital transformation demands, whilst its comprehensive API capabilities enable integration with emerging technologies and new service delivery models. Real-time financial information supports agile decision-making and responsive service delivery, with complete financial visibility accessible across organisational boundaries where appropriate through secure, controlled access.

The platform supports the movement towards integrated service delivery and partnership working, providing the technical foundation and operational capabilities needed for collaborative arrangements. Whether working with other local authorities, health services, voluntary sector partners or private sector providers, LG Finance enables the financial transparency and control needed for effective partnership governance.

Benefits Across the Organisation

LG Finance delivers value to all stakeholders within local authority operations. Service directors gain complete visibility of their budget positions and can monitor financial

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performance in real-time, enabling proactive budget management and freeing staff time from administrative burdens through automation. Chief Finance Officers benefit from real-time financial positions supporting accurate forecasting, proactive error prevention that eliminates overpayments and corrections, and automated validation that satisfies external auditors whilst ensuring compliance. Finance teams eliminate reactive fire-fighting by accessing complete information in one location, with the ability to correct errors before transactions are finalised rather than managing disputes and corrections afterwards. Heads of Business Intelligence gain a modern, cloud-native architecture that eliminates legacy infrastructure costs, with well-designed integration capabilities and a future-proof, API-first design that reduces technical debt.

Budget holders across the organisation benefit from clear, accessible financial information that enables them to manage their resources effectively without requiring specialist finance knowledge. The intuitive interface and logical workflows mean that non-finance staff can access the information they need whilst appropriate controls and validations ensure financial governance is maintained.

Proven Platform and Expertise

Built on Access's 30 years of expertise in local government technology and backed by our position serving approximately 80 councils with our solutions, LG Finance represents proven functionality enhanced with modern capabilities. Our track record includes 16 of 18 recent Welsh authority wins, demonstrating our continued strength in the local government market. The platform is available through the G-Cloud framework, ensuring procurement compliance, and maintains UK data residency for GDPR and data protection compliance. Our commitment to social value is reflected in our support for local employment and SME supply chains, whilst our comprehensive approach to regulatory compliance ensures the platform meets all statutory requirements.

Summary

LG Finance represents a modern approach to local authority finance management, combining comprehensive functionality with enhanced control, complete visibility and intelligent automation. By addressing the fundamental challenges facing local authority finance operations—manual processes, limited visibility, inflexible systems and error-prone calculations—the platform enables councils to manage their budgets proactively, accurately and efficiently whilst meeting all statutory requirements and supporting the delivery of high-quality services to citizens.

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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.

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.

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Scoping and Workshop	Additional consultancy time for Scoping and Workshop to help drive out the Confirmation of Requirements
Bespoke Consultancy	Any consultancy required to be conducted on behalf of the customer. For example, Emergency Admin/Data entry, Reconfiguration etc. Please contact Onboarding with requirements for quotation
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

Providing you and your users with a high level of incident support is of prime importance to us. As well as being able to answer your queries, our support staff will also be able to inform you about the latest software releases, and provide hints and tips to ensure you are getting the most out of your product. To emphasise the importance of support to Access we have over 500 employees in the UK in our Support and Customer Success functions.

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.

We provide 3 main support plans as detailed below.

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

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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.

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.

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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

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    - 12 Hour RTO
- 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

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data. Maintaining this accreditation requires us to demonstrate effective security controls, regular staff training, and documented processes that are tested through independent annual audits.

9 Development Life Cycle

As one of our core products Access LG Finance has a detailed roadmap of improvements driven both by customers and by our own roadmap. Ongoing development against each application is supported by a development plan that has high levels of details for the next 3 months including user stories. Beyond that top line plans are in place by quarter for a further 12 month with a list of additional options waiting to be added.

New functionality is added on a regular basis (usually every quarter) with all companies benefitting at the same time.

10 Technical Requirements

LG Finance runs on any computer or iOS / Android mobile device with a browser and Internet connectivity.

Web Browsers

- Microsoft Edge
- 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

Maintenance windows as detailed above are minimal with the service so that we use all reasonable efforts to ensure that the SaaS Services are available for 99.70% of each calendar month.

As a true SaaS solution customisation is not available although the product can be configured to meet all standard set up requirements.

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