

G-Cloud15

Access Legal Case Management Evo Service Definition

Contents

1	Service Overview.....	3
2	Onboarding.....	4
3	Additional Service Options	5
4	Service & Support Management Details	6
5	Account Management & Customer Success	7
6	Outage and Maintenance Management	7
7	Backup and Disaster Recovery.....	8
8	Business Continuity.....	9
9	ISO27001 Accreditation	9
10	Development Life Cycle.....	9
11	Technical Requirements	10
12	Service Constraints.....	10

1 Service Overview

We provide a full holistic solution, all fully integrated saving you the hassle of using separate systems. Here, you'll find more details on what these are and what they do.

Access Legal Case Management Evo - Practice & Case Management Software

A Web Browser based system which does away with the need to install software on your hardware device (other than a modern Web Browser product such as Google Chrome, or Edge Chromium). Perfect for remote working from any hardware device.

- **Case Management:** Improve your department's efficiency with automated workflows and tasks designed especially for the public sector.
- **Management Reporting:** Monitor your departments efficiency and effectiveness with intuitive reporting.
- **Time Recording:** Record time more easily and accurately to ensure you know where efficiencies can be made.
- **e-Bundling:** Create court-compliant, fully indexed, paginated and bookmarked court and core bundles in seconds.
- **Mobile app**
 - Record time while on the go from your mobile phone or tablet.
 - Record dictations, which are sent straight to the secretary for transcription and stored on the case file. You can even have them automatically transcribed using your phone's own voice recognition technology.
 - View matter balances, time reports, and expense reports
 - View file history of a matter
 - Send email
 - Monitor team efficiency and KPIs from your mobile phone.
- **Client Portal - "MyLegalSpace/SafeChat"**
 - Securely collaborate with third parties, give your client access to milestones and documents and get forms completed online.

Integrations

- Access Legal Case Management integrates with many applications used by legal professionals to enhance the functionality of the core case management system.

Data Security

- Access UK is ISO27001 accredited at a company level and has passed GDPR and Cyber Essentials Self-Assessment.
- Multi Factor Authentication available.
- Firewalls, Intrusion Detection, antivirus and other security features applied at datacentre / server level.
- Data security is part of the culture here at Access and is ingrained in everything we do. We carry out frequent ISO audits and ensure that all personnel are regularly trained and tested on data protection standards. Your data is in very safe hands with Access.

Technical Requirements

There are no technical requirements for using Access Legal Case Management software beyond a modern web browser (e.g. Edge or Chrome) and internet connection. As it is browser-based, users simply need an internet enabled device and their log in credentials. However, administrators will need the configuration tool which requires a Citrix license, which is managed by Access Legal.

Microsoft Office 365 licenses are required and can be procured through us or Microsoft directly.

2 Onboarding

We aim to provide you with an excellent experience in getting up and running with Access Legal Case Management. Our Implementations packages range from small site implementations using our rapid FlightPath Implementation packages right up to larger solution projects where we would use our Access Implementation methodology. For the set-up process to be as successful as possible, we need to work together to achieve this.

Access FlightPath

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e-learning, so your users can learn our products at their own pace.

Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote customer projects.

Each FlightPath implementation programme from Access follows a well-defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

3 Additional Service Options

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

Financial Director (legal accounts)	Our Financial Director Legal Accounts solution integrates seamlessly with Access Legal Case Management to provide a full Practice Management solution. Financial Director Legal Accounts gives you complete control over your firm's finances and is fully compliant with the Law Society and SAR
Workflows and modules for specific areas of legal practice	We offer a broad range of workflows and modules designed to make managing cases in different areas of law more efficient.
Access Analytics	As part of the Access Evo platform, Access Legal Case Management supports an integration to Access Analytics (a business insight and reporting solution) that includes extended reporting capabilities and allows users to create their own bespoke reports and dashboards. This can be undertaken directly by the user, or consultancy services are available for a hand-held approach.
Workflow Specific Training	Training covering a module/application specific workflow i.e., Family/Matrimonial, Crime, Probate, Conveyancing
Project Team Training	Training with your Project Team to ensure that they have an understanding of all relevant functionality
General Consultancy & Configuration	Additional ad-hoc consultancy and configuration that is required that is not described in any of the other services.
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 provide 3 main support plans as detailed below.

The Essential Plan

The online service The Essential Plan is available to all Access customers as part of your license fee and provides you with easy-to-access online support for all your queries, facilitated via our Customer Success portal.

The Standard Plan

Get answers faster

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

Boost productivity with direct access to the experts and achieve a higher return on investment

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

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

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 specialising 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 Outage and Maintenance Management

Outage Reporting - Customers can subscribe to email alerts giving updates on scheduled maintenance and outages. We also provide all our customers with a live dashboard so you can also review uptime statistics.

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.

7 Backup and Disaster Recovery

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

All backups are stored on disk and are retained for a period of 3 months.

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.

Retention for backups:-

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

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.

Standard Restore Testing

We undertake a restore test automatically on a weekly basis.

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).

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.

8 Business Continuity

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

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

10 Development Life Cycle

As one of our core products Access Legal Case Management 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.

11 Technical Requirements

Access Legal Case Management runs on any computer or mobile device with a browser and Internet connectivity.

Web Browsers

Google Chrome, Edge Chromium, Safari 9+. We always recommend that the latest version of your preferred web browser is used for optimal user experience.

Mobile Devices

IOS, Android

12 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.