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Access CaseMatters Evo

Service Definition

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1 Service Overview

Access CaseMatters Evo case and practice management systems help more than 25,000 professionals across 850 law firms be more efficient and more productive – freeing up time for fee earners to focus on what they do best.

The time-saving nature of Access CaseMatters Evo allows fee earners to complete tasks much faster than ever before. Through the use of automation, tedious paperwork and client communications can happen in minutes rather than hours.

In addition, Access CaseMatters Evo has grown organically to become the most flexible and complete solution available for anyone who needs to

- Streamline processes
- Automate tasks
- Manage risk and compliance
- Keep the integrity of critical data
- Provide a superior customer and stakeholder service

As a result, Access CaseMatters Evo is used by national heavyweight law firms, boutique smaller organisations, Medical Agencies, Claims Management companies, Hire Car companies etc.

Some of the key features of CaseMatters Evo are:

- Case Management
    - Data Storage\Security
        - Use Access CaseMatters Evo's powerful database to store all your case information, including details on clients, experts, solicitors and other parties. All records of correspondence are also tracked such as emails, phone calls, letters and faxes.
        - Access UK is ISO27001 accredited at a company level and has passed GDPR and Cyber Essentials Self-Assessment.
        - Multi Factor Authentication and Advanced Threat Protection available.
        - 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.
    - Diary and Task List
        - The diary facility allows you to setup reminders with automatic notifications of tasks to complete and upcoming appointments.

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        - Link your tasks to workflow so, with a click of a button, the next steps can automatically commence.
    - Document Management
        - Generate all relevant documents quickly and with minimal effort. Intelligent documents are contextually sensitive – which means they look personalized and not mass-produced.
        - All documents are searchable, and incoming items can be scanned and stored digitally, creating a paperless working environment.
    - Time Recording and Costing
        - Either automatically as you go or retrospectively in batches – all the work you complete, including document production, emails and telephone calls are automatically time-costed at your selected rate.
    - Bundling
        - Select and amalgamate any number of case documents and correspondence into one single paginated PDF bundle.
    - Lead Management
        - Client Relationship Management is incredibly important – and it can be done within your CaseMatters Evo Case Management solution. This means you can use the details stored in CaseMatters Evo to help manage your relationships with clients, prospects and referrers.
    - GDPR Information Asset Register
        - The Information Asset Register from CaseMatters Evo acts as a map for all data information assets your organisation has. This makes it easier to track data, understand why you have it, what it's being used for and its expiration policies – making GDPR compliance easier.
- Legal Accounts – **Access CaseMatters Evo Accounts**
    - SRA compliant software. Fully integrated with the CMS, you will have access to all of the case and financial information. Especially useful for Alternative Business Structures taking on external work as you have access to both the office and client accounts.
- Reporting and Analytics
    - The reporting toolset in Access CaseMatters Evo can be tailored to individual users, departments or activities.
    - Standard reports – which can be amended using the administration tools provided – are all included within Access CaseMatters Evo.
    - Any information held within the system can be reported on and exported to third-party tools, such as Excel, for further analysis.

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- **Access CaseMatters Evo BI** is a business intelligence dashboard that provides detailed analytics on key aspects of their business. Users can break down vast amounts of data, analyse where improvements can be made and create a more efficient working environment.

- Integrations
  - Access CaseMatters Evo has an open API allowing third party software integration.
  - A suite of tools, available to system administrators, is available to allow clients to build their own integrations. These integrations could be via REST or SOAP based webservices, where they are consuming a third parties service, or through basic file transfer.
  - Due to Access CaseMatters Evo's flexibility various integrations with numerous third parties are available as standard. These include (see Additional Service Options for an extended list):
    - SMS Outbound and Inbound functionality
    - Legal Bricks ID and AML Checks
    - Legal Bricks Conveyancing Searches
    - SDLT
    - LRBG (Land Registry Business Gateway)
    - MoJ Portal
    - PI Calculator
    - CCBC (County Court Bulk Centre)
  - Use third party accounts system? Access CaseMatters Evo has integrations with multiple third-party accounts systems.
- Client Portal
  - Seamlessly utilising your own branding and visual identity, **TouchPoint+** provides full self-service control for your clients, customers, partners and stakeholders.
    - Accessible via smartphones, iPads, tablets and laptops TouchPoint+ encompasses all of our online communication, case tracking, through **Fileview**; and secure document acceptance and completion, using **SecureDocs+**, tools.
- Mobile App
  - The TouchPoint app brings the TouchPoint+ system to mobile devices so you can automatically send push notifications to clients and they can see their full case information on their smartphones and tablets.
  - Need to access your matters on the go? **Proclaim Go** is a mobile and tablet friendly application powered by Access CaseMatters Evo. Designed for easy access wherever you are. With Proclaim Go you can:
    - Record calls – inbound and outbound
    - Search for live case information

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        - Record meeting information
        - Create memos
        - Record time
        - View tasks; and
        - Add notes using a smartphone's existing digital dictation functionality.
- Administration Tools
    - Access CaseMatters Evo's administration tools gives clients the ability to be truly "self-serving" in terms of system administration. Administration includes:
        - The building and maintaining of data screens
        - Creation and maintaining of new and existing workflow
        - Amending and creating reports
        - Building of import and export routines for the importing and transferring of data
        - Creation of integrations between Access CaseMatters Evo and third-party software
    - As your business grows you have the tools to allow Access CaseMatters Evo to grow, adapt and evolve with your business.

2 Onboarding

We aim to provide you with an excellent experience in getting up and running. 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.

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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.

Clear roles and responsibilities
At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

Your onward journey
Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team.

The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

Full details of our Access CaseMatters Evo FlightPath implementations can be found here.

3 Additional Service Options

On top of the services included within the standard FlightPath packages, the table below highlights the additional value-added services that our consulting teams can provide. Please take some time to review these.

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

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provides the reassurance that as your business needs evolve you can use them to extend and modify your use of the technology.

Additional user, workflow and administration training

User Level 1 and 2 Training	Will provide an overview of the use of Access Proclaim and basic workflow administration
Technical Level 1, 2, 3 and 4 Training	In depth training on more advanced workflow and system administration
Advanced Report Training	In depth training on building bespoke reports
Access Proclaim Accounts training	This will cover everything needed for the basic day to day running of your accounting system, including details of day to day postings, to matter ledgers, nominal accounts and purchase ledger, bank reconciliation, reporting and month end procedure.
Module-specific training	More advanced training covering a module-specific workflow

Additional modules, integrations and overview training

Access Proclaim Practice Management & Legal Accounts Software	Our Accounts solution integrates seamlessly with the Access Proclaim Case Management system to provide a full Practice Management solution. Access Proclaim Accounts gives you complete control over your firm's finances and is fully compliant with the Law Society and SAR.
New Business module	Standard onboarding module allows for initial instructions and quotes to be managed in Access Proclaim prior to a live case being opened. It allows instructions from existing clients to be identified and linked to the Existing client file. It also captures all key information at the outset and transfers this to the live matter when opened with progress being monitored by a series of inbuilt tasks and workflow.
Personal Injury module	Access Proclaim Personal Injury Case Management module can be tailored to any area of PI work, e.g. RTA, RTC, Employers' Liability / Public Liability (EL / PL), Clinical Negligence, etc.
Conveyancing module	Conveyancing module not only makes the task of conveyancing easier but brings your business in line with the continued industry drive towards eConveyancing. The software is designed to help law practices improve the service provided to clients whilst simultaneously reducing fixed overheads.
Debt Recovery module	Access Proclaim Debt Recovery and Collections module is a comprehensive County and High Court debt recovery system; ensuring high standards of effective recovery are achieved consistently. Access Proclaim manages the production of Claim forms and covers Statutory Demands, Bankruptcy and Winding Up Proceedings, ensuring efficient operation, fast turnaround and an improved bottom line.
Family module	Family work – from Divorce and Ancillary Relief through to Children's Act claims and Injunction proceedings – is more complex than ever, particularly when publicly funded. Let Access Proclaim handle all the time-consuming administrative tasks and document production, allowing you to provide the highest quality of personal service to your clients.
Crime module	Access Proclaim Criminal Case Management module provides a solution to the administrative hurdles inherent in Criminal work, enabling you to handle caseloads efficiently and profitably. Catering for Investigative and Proceedings for Criminal LSC casework, Access Proclaims standard case file structure can be easily modified to suit your way of working.

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Employment module	Improving both the speed and efficiency with which you handle your cases, Access Proclaim Employment Case Management module greatly improves not only the quality of service your clients receive, but also your bottom line. Access Proclaim caters for both Claimants and Respondents, and all claim and funding types.
Probate module	Access Proclaim Probate Case Management module provides you with a total solution, delivering an array of time-saving benefits for your fee earners. Much Probate work is administrative, painstaking in character and necessitates heavy document production. Let Access Proclaim handle this, enhancing profitability without compromising standards of service.
Financial Mis-selling module	Access Proclaim caters for a wide range of financial claims including Packaged Bank Accounts (PBA), PPI mis-selling, Plevin, and more. Access Proclaim Financial Claims module improves case handling, reduces the time spent processing each case and increases the quality of service your clients receive, improving your overall bottom line.
OPG-COP module	Access Proclaim provides a solution to the administrative hurdles inherent in Lasting Power of Attorney (LPA) and Enduring Power of Attorney (EPA) work. The many forms required are automatically completed enabling you to handle caseloads efficiently and profitably.
Claims/Accident management module	Access Proclaim Claims/Accident Management module is available for a wide range of accident management activities from road traffic accidents through to credit hire and fleet operations. With Access Proclaim, you can improve your case handling and increase the quality of client service, whilst reducing time spent processing cases. The entire claims process can be managed – from initial instruction through to hire arrangements and successful conclusion.
Mediation module	Access Proclaim Mediation Case Management module has been designed to eliminate time-consuming document production and simplify the complicated rates and structures associated with this particular area of legal services. The Access Proclaim Mediation solution is entirely customisable to suit family, workplace, commercial and public dispute procedures.
Medico Legal module	Access Proclaim Medico Legal Case Management module can deliver a high level of automation throughout the entire medical reporting process – from initial instruction through to the sending of the final report
Costs Drafting module	Access Proclaim Costs Drafting module is a fully comprehensive solution that assists with a number of aspects of bill creation – including layout, calculation and the production of a red line bill.
Individual Rights	The GDPR Individual Rights workflow will manage requests and automate their handling, reducing cost and aiding compliance with ongoing legislation.
Corporate Commercial	Access Proclaim Commercial Case and File Management module is suitable for a huge range of commercial activities. If your business relies on any number of process-driven activities, including management of staff, complaints handling, supplier management and telesales, then Access Proclaim can help you.
General	Access Proclaim General module will provide a solid platform to develop a bespoke system and workflows.
In-house Legal	Access Proclaim In-House Legal module ensures a consistent approach to legal services, boasting efficiencies at every stage of file management and resulting in hours saved on administrative tasks.
Credit Control	Access Proclaim's Credit Control Centre (CCC) provides you with an integrated suite of tools to manage credit control within your practice. A central dashboard display provides key financial and payment information, with the ability to search for – and drill directly into – bills, clients and matters.

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Additional Integrations

A2A - RTA and ELPL	MOJ portal for RTA and ELPL claims
Arken.Legal	Integration to allow client to pass details to Arken in order to produce a Will Document and return
Conveyancing Data Services	Workflow to request conveyancing search packs through Access Proclaim using URL strings and call external application command
County Court Bulk Centre	County Court link for issuing Claims, requesting Judgments, issuing Warrants and marking cases as paid.
CRIF ID	CRIF ID validation web service (Identity Check / Anti Money Laundering)
Doctors Chambers	Web Service Link to Doctors Chambers Medical Agency - books appointments and retrieves medical reports and invoices
Index Property Information	Search Provider for Conveyancing Purchase Properties
InfoTrack	Conveyancing Search Provider integration
Land Registry Business Gateway	LRBG Web service link for information services and applications
Lawyer Checker	Check on Lawyer and Individual Bank accounts for Conveyancers
Legal Bricks Conveyancing Searches	Conveyancing Search Provider
Legal Bricks ID AML Search	ID AML Service from Legal Bricks
MIPOS	Web Service link with Slater Gordon
Mycarcheck.com	Vehicle look up facility being investigated by SG
PALI Advanced	Link to Conveyancing Search provider
Perfect Portal	Lead generation integration from Perfect Portal
PI Calculator	Webservice link to PI Calculator
PIE	Link to Property search provider
Review Solicitors	HTTP web service to send a simple request to trigger a review request email for the customer
SDLT+	An updated version of the SDLT connection
SearchMove	Sends set information to the SearchMove system and generates a case
Smart Search	Smart Search ID/AML (Identity Check / Anti Money Laundering)
SortReferer	Conveyancing Portal
STL	STL online Conveyancing Searches (via URL)
X-press Legal Services	Allows users to request conveyancing search packs from X-press Legal Services
Paragon / Indigo	Accounts link
Quill PinPoint	Accounts link

Additional Services – Time and Materials basis

Configuration as a service / bespoke consultancy	We will scope specific requirements you may have producing a configuration of requirements for the particular area of the system and then build to your signed off requirements
Data Migration	Conversion of your existing client, case and financial data to your new Access Proclaim system.
Bespoke report writing	Following a confirmation of your reporting requirements we will create bespoke reports to meet your reporting needs.
Project team training	This course is designed to provide an overview demonstration of Access Proclaim features and terminology for the designated Project Team

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UAT training	This course is designed to provide client with the skills and guidance to verify migrated data within Access Proclaim and test the system during the UAT period.
Additional User Training / On-site Training	We will provide generic additional remote/on-site user training for Access Proclaim users of the system
Bespoke Software Integration	We will scope your requirements for an integration determining the best delivery method producing a requirements document and building to meet these
Project Management	Depending on the scope and scale of a project our project managers will organise and manage resources necessary to complete the project, providing project milestone updates to project stakeholders, managing risks should they arise and ensuring the project is delivered to the agreed deadline and in line with the set requirements.
Handholding	We will provide a dedicated support on your Go Live day to ensure that our system design and workflows are in line with your day-to day business requirements

Notes Access Proclaim additional modules and apps will require additional costs which should be discussed your Account Manager

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 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

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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.

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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.

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Retention for backups:-

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).

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.

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

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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 CaseMatters Evo 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 CaseMatters Evo is an Access hosted or on-premise solution

Access Hosted

Summarised below are some of the key components that are provided as standard as part of our Access CaseMatters Hosted Desktop solution

- **Database Management**
  - One of the features of our hosting service, which sets us apart from any other provider and IT department, is the knowledge we have about our own software and the level of database management we offer to our hosted customers.
  - Our team of Progress Database qualified administrators ensure that our customer's databases are fully optimised. Database management has become more important as the volume of business data has grown. Rapid data growth creates a wide variety of negative conditions, including poor application performance and compliance risk, to name a few. Database management comprises several proactive techniques to prevent the deleterious effects of data growth.
- **Backup**
  - The solution has been designed for disasters ranging from a database restore through to a complete datacentre outage. The backup architecture used is critical to being able to respond to diverse set of restore scenarios that may be required.
  - Our standard backup policy and retention periods are:

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        - Daily differentials – retained for 1 month
        - Weekly Backups – retained for 3 months
        - Monthly Backup – retained for 3 months
        - All Backups are verified during the backup process
        - All full backups are fully tested to ensure that a recovery can be performed.
- **Datacentre Infrastructure**
    - The CaseMatters Hosted Desktop solution has been designed to enterprise level with the highest possible specification for resilience and replication. Split across 2 of the UK's premium data centres, the solution delivers replication and recovery options that are unrivalled in the mid-market arena.
    - Our primary active datacentre is in Telehouse North 2 Docklands with the secondary datacentre located in Equinix LD3 Park Royal.
- **High Availability**
    - Dual firewalls are used to connect to dual switches, SANs and Physical Hosts providing protection against individual failure. Internet connectivity is protected using the Border Gateway Protocol (BGP) ensuring connectivity in the event an outage of an upstream Internet Service Provider automatically switching over to a secondary provider and maintaining the highest performance and resiliency of your connection to us.
    - The physical hosts run VMWare ESX and operate within a VMWare vSphere cluster. One cluster node is in Telehouse North 2 with the second in Equinix LD3.
- **Replication**
    - The virtual machine images and virtual machine storage is replicated between the two datacentres using the Zerto Virtual Replication.
    - The use of these technologies ensures that storage and virtual machines are resident in both datacentres giving maximum flexibility in the case of a disaster.
- **Communications**
    - Need to upgrade or replace your internet connection as part of your Hosted Desktop Solution you can leverage our relationships with the very best providers in the UK to provide you with an internet circuit or point to point circuit straight into our datacentre to obtain the fastest and securest access to your hosted desktop.
- **Acceptable Use, Terms and Conditions and SLA**
    - Please use the following links for further information:
        - Acceptable Use
        - Standard Terms and Conditions

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- SAAS SLA

On-Premise Requirements

- **PCs**
  - If purchasing a new PC or laptop, we recommend the computer has at least an i5 core processer and 8GB of memory. Any specific queries, please contact Access Legal.
  - CaseMatters Evo is **not** supported with Microsoft Office 64-bit versions nor is a connection to a CaseMatters server over WIFI.
  - Our suggested **minimum** specification to run CaseMatters would be as follows:
    - A minimum of 1GB of free memory and 5GB of free disk space for the client software (Please also keep in mind that additional software also uses memory/processor resources i.e. anti-virus software, anti-spyware etc).
    - CPU: Dual Core
    - RAM: Minimum 8GB
    - Free hard disk space: 5GB
    - 100MB network card
    - 1024 x 768 screen resolution with 16-bit colour depth
    - Minimum Progress OpenEdge 12.2.16 (Provided by Access Legal)
    - Adobe Reader XI (11.0.4 minimum)
    - Microsoft .NET Framework 3.5 AND
    - Microsoft .NET Framework 4.5 or higher
  - Supported Client Operating Systems (32 or 64 bit)
    - Windows 11 Professional Editions
  - Supported Microsoft Office versions (32-bit only)
    - Microsoft Office 365 Business Premium, E3, or E5

- **Terminal Server Requirements** (This is only a requirement if CaseMatters users are not on the same LAN as the Database server – i.e. satellite offices / home / cloud users)
  - Supported Server Operating Systems (32 or 64 bit)
    - Windows Server 2022
  - Microsoft Office 365 (32-bit only)
  - Screen resolution of 1024 x768, 16bit colour depth or better
  - Minimum 0.5Mbps internet access per user
  - 1 x 2.6GHz Core for every 3 users
  - 1.5GB RAM Per User
  - Microsoft .NET Framework 3.5 AND
  - Microsoft .NET Framework 4.5 or higher
  - Minimum Progress Openedge 12.2.16 (Provided by Access Legal)

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- Adobe Reader XI (11.0.4 minimum)
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- **Database Server Requirements**
  - Supported Server Operating Systems (32 or 64 bit)
    - Windows Server 2022
  - Microsoft Office 365 (32-bit only) or newer
  - Screen resolution of 1024x768, 16bit colour depth or better
  - Microsoft .NET Framework 3.5 AND
  - Microsoft .NET Framework 4.5 or higher
  - Minimum Progress Openedge 12.2.16 (Provided by Access Legal)
  - Adobe Reader XI (11.0.4 minimum)

12 Service Constraints

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

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