

G-Cloud15

Access Trail

Service Definition

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1 Service Overview

Trail is the daily checklist app for productive teams and is used by thousands of businesses to run food safety, brand standards and daily operations. Trail replaces your paper processes to guide your teams through their day. Whether it's opening checks, cashing up or compliance, you'll know everything's been done. Trail cuts head office admin by 25% whilst improving operational efficiency at site level.

Trail is a consumer grade progressive web app with multiplatform support and can be used on any device, in any country or time zone.

Below is a summary of the key system features:

Accessible to users globally

Trail can be accessed by unlimited users on any device with access to the internet via a simple log in process. Users can be added quickly by an administrator and linked to a specific site or team to ensure the correct set up and authorisation routes are followed.

Subscription model & billing

Trail works off a monthly or annual subscription model where customers only pay based on live sites. Simple deactivation/reactivation without losing any data. Trail supports multi-currency billing via credit card or direct debit/invoicing.

Multi Users/Sites

Trail is built and designed from team and site level up. Simple UX/UI helps teams get up to speed quickly. Trail user hierarchy is split by Teams, Managers and Admin. All user permissions and levels can be customised via user settings.

Support

Trail operates a support system and live chat which operates Mon-Fri 8am-6pm with a response time of 0-15mins with emergency out of hours support 24/7. All customers are offered onboarding calls and those on standard plan will have a designated customer success manager. Trail has a help centre library with hundreds of FAQ related articles to support teams with training.

Task Management

Trail is the market leading task management/checklist tool for hospitality and leisure. Any task can be customised or designed to meet the customers needs. All tasks have a time window for completion to drive efficiency and each task can have it's own bespoke scheduling. Tasks are assigned to sites/departments/units using tags where necessary with comments, time and date stamps and file/photo attachments for accountability and traceability.

Manage tasks

Manage tasks is a task library where admin and managers can create new content and edit existing content with tailored scheduling and assignment to cascade information down to teams/site level instantly. Trail has template libraries where customers can use recommended templates, industry specific, with some backed by local authority or common template examples used industry wide.

Reporting & notifications

Trail gives management and head office real time visibility and control over their teams. Each site is scored based on the punctuality of completing tasks and our scores dashboard pinpoints areas where brands are doing well, or falling behind. Task reports identifies areas to improve, and splits our reporting by missed, late and early tasks. End of day summary reports can be emailed. Reports can be exported into CSV and PDF. Notifications can be sent via email when a task is completed so that critical checks are not being missed and the correct escalation process is in place.

Integrations

Trail integrates to over 4000+ apps via zapier.com and can integrate with most systems via an open API. Trail becomes a central operations hub for teams with inbound/outbound information passed between Trail and other systems designed to centralise and streamline information and communication.

Setup & Trial

Unlike many systems and projects, Trail is a fast SaaS product with self-sign up capability. Anyone, anywhere can sign up to Trail and use our task library straight away. No on site training needed. Our manage tasks section, and product led setup guide, is designed to get teams up to speed quickly with minimal effort.

Large and enterprise customers should typically anticipate a 2-4 week lead time from sign up to roll out. Please refer to our onboarding schedule for more info.

Trail offers a 14-day free trial where customers can test pilot themselves before any commitment or payment.

2 Onboarding

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 eLearning, 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 program 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 use 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.

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.

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. To ensure The Access Group can continue to support all our products, we have made sure 100% of our support teams can work securely and seamlessly from home. We have increased the capacity of our telephone system so support teams can be contacted wherever they are working using our usual support phone numbers.

Full details of our Flightpath implementations for Access Trail can be found [here](#).

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.

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.
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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 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 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 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 12 Months, financial data is kept for 7 years.

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	1 year for non-financial data /7 years for financial data
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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

Trail has a roadmap of improvements driven by customer feedback and our own ongoing strategy. Ongoing development is supported by a detailed plan for the next 3 months and includes research, user-focused design and documentation of requirements. Higher level plans are also in place for the next 6-12 months and beyond with a managed backlog of additional ideas that are regularly reviewed for impact against the main roadmap. New functionality is added to the core product at least every quarter

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.