

FORTESIUM

Association Smart

Service Definition Document

G-Cloud 15



Service Overview

Over the past 16 years Fortesium have built the only UK cloud software company providing commercial off-the-shelf solutions designed exclusively for regulators and membership organisations.

Our ongoing mission is to empower our clients with the tools and expertise required to digitalise and automate their processes.

For us, a successful partnership sees our product save your organisation time, money and resources, allowing you to concentrate on new challenges whilst digital tools take care of the rest.

Solutions delivered on time and on budget.

We are technology experts with a deep understanding of membership and regulation. Our consultants have over 50 years of experience working in the sector. We take the time to understand your organisation and its requirements. We speak your business language, and we can add value to your business requirements.

Association Smart – off the shelf SaaS for small to medium membership organisations.

Association Smart is a fully customisable off the shelf membership hub for small to medium membership organisations. It's the lightest, fastest and most budget-friendly SaaS platform for managing membership from end to end. Handle applications, renewals, and communications with ease — all within a fully customisable setup. From workflows to emails, you're in control. With Association Smart, everything is managed by you.

At a Glance

Association Smart is a lightweight, all-in-one member management solution designed for associations that want full control without the complexity. It supports the entire membership lifecycle with easy-to-use tools for applications, renewals, and communications — all delivered in a self-managed, intuitive SaaS platform. Built for speed, simplicity, and independence, Association Smart gives your team everything they need to run a professional member service with minimal overhead.

What's in it for you?

Association Smart puts your team in control — it's built for self-management. Your organisation manages its own customisable workflows, forms, and communications — without needing lengthy implementation or ongoing external support. You set the pace, launch quickly, and stay in control. It's the ideal choice for associations wanting to cut costs, stay agile, and still deliver a top-tier experience to members and stakeholders.

Features

• Client customisable applications, workflows and email templates
• Prebuilt emails, forms, and workflows designed for seamless member management
• 1 click annual renewal processes
• Mass communications
• Search the Register
• Admin portal and member portals
• Full reporting functionality including PSA accredited register templates
• Direct debits and card payment options for registrants
• Full integration available for Microsoft Dynamics, Outlook

Benefits

• Clients can go live on day one
• Reduced costs and greater control as clients have full customisation functionality
• Built on the Microsoft stack of products
• Vast savings on labour intensive processes
• Continuous improvements and new features
• Fully responsive and accessibility assessed
• Self-storing documents and emails
• Full security hosted in Microsoft Azure

Company Values



Data Management, incident and business continuity arrangements

Fortesium solutions are hosted within Microsoft Azure to ensure their resilience and availability. Microsoft Azure services achieve service resilience through redundant architecture, data replication, and automated integrity checking. Redundant architecture involves deploying multiple instances of a service on geographically and physically separate hardware, providing increased fault-tolerance for Microsoft Azure services.

Each component of Regulator Online is hosted in Microsoft Azure which guarantees very high rates of uptime for all infrastructure components. Specific SLA examples are shown below for various Azure based services that are part of the Regulator Online infrastructure options.

- Monthly Uptime % = $100 * (\text{Maximum Available Minutes} - \text{Downtime}) / \text{Maximum Available Minutes}$
- SQL Azure: 99.99% monthly uptime
- Virtual machines: 99.9% monthly uptime
- Azure Bot Service (Premium): 99.9% monthly uptime
- DDOS Protection Service: 99.99% monthly uptime
- Power BI Embedded: 99.9% monthly uptime
- Storage SLA: 99% monthly uptime

Microsoft Azure core compute services ran at 99.995% average uptime across the global cloud infrastructure from **July 2018 to July 2019** (Source: <https://azure.microsoft.com/en-gb/blog/advancing-microsoft-azure-reliability/>)

Fortesium solutions are hosted within Microsoft Azure which ensures a high level of support for disaster recovery. Microsoft Azure supports multiple mechanisms for handling DR, for example:

- Active geo-replication
- Auto-failover groups
- Geo-restore
- Zone-redundant databases

If using zone redundant premium or business critical databases or pools, recovery is automated in the case of an outage.

Our deployments use Azure Container Apps which supports availability zones (multiple deployments across three physically separate groups of datacentres within each Azure region)

Back up

Data backups are provided by Microsoft Azures' SQL Server built in and fully automated backup mechanisms. These consist of full weekly backups, differential backups every 12-24 hours and transaction log backups every 5-10 minutes (depending upon computational requirements and volume of database activity).

This means that data recovery can take place to anywhere in a 10-minute window, allowing for a fine-grained approach to recovery.

Long term backups can be held for up to 10 years, if required. These backups can then be restored as a new database.

With Regulator Online, clients can revert to any backup held over the supported period, in a matter of minutes and be confident that all data (including backups) is fully secured.

Fortesium's standard client database back-up retention PITR (Point in Time Restore) is 7 days, 24 hour back up frequency and 6 months of weekly backups retained (first week of every month). The above outlines our standard retention policy, however each client's needs are assessed on a case-by-case basis. We can revert to the most recent back up in the event of system failure during transaction processing. In most cases of failure during transaction processing, a failure message will automatically retry and be successful, without data loss occurring.

Service Levels / Support and Maintenance / After Sales Support

We provide real, trained, and experienced people to deal with technical and functional support issues and queries from 09.00 -17.00 on all standard UK working days. Critical out-of-hours support can be provided based on the requirements of the client to cover critical calendar points.

Out-of-hours support will be resourced by the established support team, providing reassurance that any issue would be resolved promptly by Fortesium personnel with a detailed knowledge of the client's specific processes.

Support tickets can be raised easily in a number of ways via:

- The support portal
- Telephone – useful if you experience a power outage or connectivity issues. Our team will log a ticket on the portal for tracking and audit purposes
- Email

All tickets are recorded and tracked using a dedicated system to support prompt resolution and senior oversight of issues arising. This collation of support issues also allows us to identify themes and trends across clients that may warrant consideration as part of our continuous improvement cycles.

User requests are prioritised according to the agreed level of service in the SLA. Our support process enables the monitoring of each service request and progress against it. This proactive approach will ensure requests are completed on time and we both meet and exceed your expectations through the proposed Key Performance Indicators.

Our operating principles are:

- A single point of contact throughout the working day
- A prompt and effective response in line with our agreed SLA
- Recognition that individual requests must be met in an individual manner
- Effective management controls and escalation procedures

Typical SLAs for our support desk are outlined below but bespoke arrangements can be discussed and agreed as appropriate.

Classification	Description	SLA for Solution identification
Critical (L1)	Prevents core part of the system from working, there is no workaround.	2-hour response. Fix within 4 hours
Major (L2)	There is a difficult workaround.	4-hour response. Fix within 48 hours
Minor (L3)	There is an easy workaround.	8-hour response. Fix within 72 hours

Outage and Maintenance Management

We use an ISO27001 compliant Security Incident and Event Management (SIEM) tool to identify threats and recommend actions. The tool adds a rating to each threat to support assessment of the risk as it applies to Fortesium. We also conduct regular internal and external pen testing to identify threats and vulnerabilities. Our team take action to resolve or mitigate vulnerabilities in line with the risk rating attached to the issues raised.

We are subscribed to the National Cyber Security Centre (NCSC) to receive regular threat reports which alert us to new and emerging threats.

Solution updates may happen with varying frequency in response to new threats or vulnerabilities that we become aware of, or in response to a client specific defect or a defect that has the potential to impact all clients. Our clients will always be given due notice of a planned update via the Customer Success Manager or Service Desk and a plan made to ensure the update does not have a business impact.

Security

Fortesium is accredited with ISO27001:2022 (Information Security Management Standard) and as such we have a wealth of robust security procedures in place to protect the software application. Additionally, Regulator Online is Cyber Essentials Plus certified. A comprehensive list of security procedures and risk management processes can be made available on request.

Transport Layer Security

Data is fully encrypted in transit; this is enforced at all times for all connections and ensures that any data in transit between client and server is fully encrypted.

Transparent Data Encryption

SQL Azure Regulator Online ensures that all databases, backups and logs at rest are fully encrypted using TDE. Backups are stored, fully encrypted, in read-access geo-redundant storage (RA-GRS).

