

G-Cloud15

Access PaySuite EVO

Service Definition

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1 Service Overview

Service Overview – Access Evo

Access Evo is a unified platform experience that connects and enhances all Access products through a single, intelligent ecosystem. As organisations increasingly adopt multiple software solutions to manage complex operations, Access Evo is ideally positioned to help your organisation succeed by eliminating fragmentation, reducing manual processes, and delivering AI-powered efficiency gains across your entire Access product portfolio.

In today's environment, organisations face significant challenges when managing multiple disconnected systems: users must navigate between different applications with separate logins, data exists in silos preventing comprehensive insights, and valuable staff time is consumed by repetitive manual tasks and context-switching. This fragmentation creates inefficiency, increases training costs, and prevents organisations from realising the full value of their software investments.

Access Evo is designed to transform how your teams work by providing a seamless, connected experience across all Access products, powered by advanced AI capabilities that enable users to DO their work more efficiently, FIND information instantly, and ACT on critical tasks without delay.

It delivers a consistent user experience with single sign-on, unified navigation, and intelligent features that learn from your organisation's data to proactively surface insights, automate routine tasks, and recommend actions - allowing staff to focus on high-value activities that require human judgment.

Core Components

Access Evo consists of six integrated capabilities that work together to create a unified experience:

- **Access Button** – A consistent navigation component embedded across all Access products, providing seamless access to your entire software ecosystem from a single-entry point.
- **Access Copilot** – An AI-powered digital assistant that understands natural language, answers questions across your data, provides intelligent insights, and can recommend or take actions within your software environment.
- **Intelligent Feed** – A centralised, prioritised task list that surfaces the most important actions across all your Access products, available on desktop and mobile, ensuring nothing critical is missed.
- **Access Spaces** – Unified dashboards and curated workspaces that bring together the specific apps and data each user needs to perform their role, with context persistence that allows them to pick up where they left off.

- **Access Data Platform** – A central data engine that synchronises information across all connected Access products, creating a single source of truth and enabling unified analytics capabilities. Compatible with third part databases to bring in data from all parts of your organisation.
- **Access Analytics** – Pre-configured dashboards and a conversational Analytics Skill that allows users to query their data naturally, without requiring technical expertise.

How It Works

Access Evo integrates with your existing Access products through a standardised implementation approach:

Your Access products are integrated with Access Identity (single sign-on) and the Evo Platform. The Access Button is embedded into each product's interface, providing consistent navigation across your software ecosystem.

Your organisation's data flows into the Access Data Platform from connected products such as Income Management, Collections Portal, Direct Debit, and other Access solutions. This creates a unified data layer that powers analytics, AI capabilities, and cross-product insights.

Users authenticate once through Access Identity and can navigate seamlessly between products using the Access Button. Their context is maintained across applications- when they return to a product, they're taken back to exactly where they left off.

The Intelligent Feed monitors all connected systems and surfaces priority tasks from across your organisation- payment exceptions requiring attention, reconciliation discrepancies, approval requests, and other time-sensitive items - all in one prioritised view.

Access Copilot continuously analyses data from the Data Platform and can respond to natural language queries like "Show me payments for council tax made last week" or "Tell me planned payments scheduled for next month?" It provides conversational insights and, with appropriate permissions, can suggest or execute actions such as fixing payment reference exceptions or updating records.

Service Description

Access Evo provides a transformative 'unified workspace' solution that eliminates inefficiency and unlocks the full potential of your Access product investment through intelligent automation and seamless integration.

As organisations adopt more digital solutions to manage complex operations, staff increasingly face the challenge of working across disconnected systems. Through Access Evo's intelligent platform, you can enable your teams to work more efficiently, make

faster data-driven decisions, and deliver better outcomes for your organisation and the citizens you serve.

This will significantly increase productivity by giving your staff a superior digital experience with AI-powered assistance, while also enhancing operational efficiency through automation and intelligent task prioritisation.

Access Evo represents a fundamental shift from managing multiple separate applications to working within a unified, intelligent ecosystem that adapts to how your organisation operates.

Intelligent Feed

The Intelligent Feed provides a single, prioritised view of all tasks requiring attention across your Access products. Rather than checking multiple systems throughout the day, users see their most important work in one place.

Service Benefits

- Staff productivity increases through elimination of context-switching and application-hopping across multiple systems.
- Reduced risk of missing critical tasks through intelligent prioritisation based on urgency, impact, and organisational rules.
- Mobile access ensures field workers and remote staff can act on priority items wherever they are.
- Real-time updates mean tasks are automatically removed once completed in any connected system.
- Organisational visibility improves as managers can see team workloads and task completion across all systems.

Service Features

- Cross-product task aggregation brings together actions from Income Management, Collections Portal, and other Access solutions.
- Smart prioritisation uses AI to surface the most urgent and impactful tasks first.
- Contextual actions allow users to resolve many tasks directly from the Feed without switching applications.
- Customisable views enable different roles to see relevant tasks based on their responsibilities.
- Mobile-optimised interface provides full Feed functionality on iOS and Android devices.
- Audit trail captures all user interactions and task resolutions for compliance and reporting.

Access Copilot

Access Copilot is your organisation's AI-powered digital assistant, providing natural language access to data, insights, and actions across all connected Access products.

Service Benefits

- Democratises data access - staff at all technical levels can query complex data using natural language questions.
- Accelerates decision-making by providing instant answers and insights that would previously require manual analysis or IT support.
- Reduces training requirements as staff can ask Copilot how to complete tasks rather than memorising complex procedures.
- Improves accuracy through AI-suggested fixes for common exceptions and data quality issues.
- Scales expertise across the organisation by encoding best practices into Copilot Skills that all staff can leverage.

Service Features

- Natural language understanding allows users to ask questions conversationally: "Show me payments for council tax made last week" or "Tell me planned payments scheduled for next month?"
- Product-specific Skills provide deep functionality within domains - the Income Management Skill can suggest fixes for payment reference exceptions and implement them with user approval.
- Analytics Skill enables conversational data exploration without requiring SQL knowledge or report-building expertise.
- Multi-product knowledge allows Copilot to answer questions that span multiple systems, providing holistic insights.
- Action capabilities enable Copilot to not just provide information but recommend or execute fixes to data quality issues and process exceptions.
- Learning system improves over time based on your organisation's data patterns and user interactions.

Access Data Platform

The Access Data Platform creates a unified data layer across all connected Access products, serving as the central "single source of truth" for payment intelligence and operational data.

Service Benefits

- Eliminates data silos by synchronising information across Income Management, Collections Portal, Direct Debit, and other systems in real-time.
- Enables unified analytics that provide comprehensive insights across your entire payment and income management ecosystem.

- Supports AI capabilities by providing clean, structured data that powers Copilot insights and intelligent automation.
- Reduces manual data reconciliation work by maintaining consistent data across all connected systems.
- Creates foundation for suite first value by enabling cross-product workflows and insights impossible with standalone systems.

Service Features

- Real-time data synchronisation ensures all connected products reflect the latest information.
- Secure data handling maintains PCI DSS compliance and meets GDPR requirements for personally identifiable information.
- Integration with third-party systems allows housing management systems, finance systems, and other platforms to participate in the unified data layer.
- Event streaming captures payment transactions, collection activities, and customer interactions for comprehensive audit trails.
- Data transformation capabilities ensure consistent formatting and business rules across all connected applications.
- Scalable architecture supports growing transaction volumes and additional product integrations without performance degradation.

Proven Impact – Real World Case Studies

Access Evo delivers measurable efficiency gains and cost savings across organisations:

- *Reconciliation Dashboard* (Analytics Skill + Dashboards): Centralises payment data and automatically flags discrepancies, reducing manual spreadsheet work from 2 FTEs spending half a day, 5 days per week, to 1-2 hours of dashboard review daily. Saving: 96 FTE days per year.
- *Exceptions Handling* (Intelligent Feeds + Income Management Co-Pilot Skill): AI-powered exception detection and suggested fixes reduce manual investigation of approximately 200 exceptions per day from 2 FTEs working half-day every day to just 2 hours daily of reviewing and approving suggested fixes. Saving: 110 FTE days per year.

These examples demonstrate Access Evo's ability to create meaningful impact in both operational efficiency and tangible value to citizens through faster, more accurate service delivery.

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.

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 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 for Access PaySuite Evo 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 [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.

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.

4 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.

5 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

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.

6 Business Continuity

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

7 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.

8 Development Life Cycle

As one of our core products Access PaySuite 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.

9 Technical Requirements – EVO

- Browser-based application access over the internet using HTTPS://.
- Requires Income Management v15.1 or higher, with v15.2 or higher required for full EVO functionality.
- Requires Access Identity (SSO) to be enabled for user authentication and access management.
- Accessed via the Access EVO platform using the EVO button within Income Management.
- Integrates with the core Income Management database and supporting data services for analytics and insights.
- Supports real-time and scheduled data processing via the EVO Data Engine.
- Requires secure connectivity to the customer's Income Management database for read-only access.
- All data is processed and transmitted securely in compliance with Access security standards and GDPR requirements.

10 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.