



Tabled Legal Case Management System

Service Definition Document

Introduction to the Tabled Legal Case Management and Workflow Platform

Tabled is a matter management and workflow platform designed by lawyers to be intuitive to use to ensure widespread adoption amongst in-house legal teams, their clients and law firms. As a no-code workflow platform, non-technical users can configure workflows and data intake to achieve the desired outcomes.

The platform has lawyers and compliance specialists at its heart but also provides service users with the ability to self-serve on legal issues, such as obtaining contracts and know-how, and to interact with their legal team to ensure everyone is on the same page.

The platform also enables inhouse legal teams to manage their law firm panels to ensure more efficient service delivery and cost management.

Service features:

- Legal intake and triage
- Client self-service with decision trees and FAQs
- Document management
- Case management
- Matter management
- No-Code Workflows
- Law Firm Panel Management and work allocation
- RFP tool to compare quotes from service providers
- KPIs and analytics
- Contract Lifecycle Management
- Data export and migration

Service benefits:

- Streamline the intake of legal and compliance work

We are always happy to discuss what you are trying to solve. Book a demo: <https://tabled.io>



- Triage work internally or with external service providers
- Full visibility of work within the team and externally
- Monitor speed of work with KPIs and find bottlenecks
- Reduce external legal spend by comparing law firm quotes
- Monitor work with law firms to improve efficiency
- A single source of truth of contracts, policies and know-how
- Collaborate on matters effectively
- Client self-service and automated client updates of work progress
- Reduce reliance on legal team by enabling clients

Onboarding, ongoing and offboarding Support

Tabled provides complete support and training in the run-up to implementation, during implementation and operation and during any transition period at the end of a contract.

Our dedicated account management team are on hand to support IT integration and legal and client training to ensure rapid onboarding.

As a cloud platform, Tabled can be implemented quickly and with Azure and Google Single Sign On, can be quickly integrated with existing workflows.

Tabled can integrate with existing systems such as email and document management and can be customised without code to capture the data and workflows required.

Service levels like performance, availability and support hours

Please see the attached template contract for service levels including performance, availability and support hours.

Access to data (upon exit)

Upon any exit, data can be exported easily in CSV or other formats and documents in the system will be provided. Tabled will provide full support with transition through this period.

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Security

We recognise that our customer's data is valuable. This document describes how Tabled keeps it safe.

Tabled is certified under the UK Cyber Essentials Assurance Programme.

Data Centre Security

Tabled is a cloud service hosted by AWS which has the highest level of certifications, including ISO 27001, PCI Certification, and SOC. For more compliance information, you can visit <https://aws.amazon.com/compliance/iso-27001-faqs/>.

Multiple Security Features are implemented and available upon request.

Data Residency

All data in AWS is hosted in the UK and will not be transferred beyond the UK.

Employee Access

Employees are required to use dual-factor passwords whenever a service we use has the ability. Authentication to SSH is always done via private key.

We have policies that require employees to never store production data on their laptops. Employees are required to use strong passwords to protect the services they use.

We maintain automatic access and security logs.

We have a strict policy that Tabled employees only access our customer's data when absolutely necessary to ensure account functionality.

Application Development

New features, performance improvements, and bugfixes are deployed frequently and up to multiple times per week. While agile, our development cycle relies heavily on a system for code quality and security. All code is peer reviewed, and requires multiple levels of acceptance on test/staging environments prior to deployment on production. Changes are checked for security and errors via extensive unit, integration, and static analysis tests. Production data is separated from development environments.

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End User Authentication

We support Single Sign-On (SSO) using the industry standard OAuth 2.0 flows. Users registered through SSO use JIT provisioning.

Encryption

Customer data is encrypted in when in-transit and at rest. All connections with Tabled services are encrypted and served through SSL. All connections with Tabled services are encrypted and served through SSL. You cannot access the service without using HTTPS. All certificates are verified on both sides with third party authorities.

Passwords are both hashed and salted using one-way encryption, which protect them even in the unlikely event of unauthorized database access. Application credentials are stored separate from the code base. Clients authenticate with Tabled using a token system.

Uptime & Reliability

We constantly monitor our service performance and have automatic notifications to ensure rapid response for service interruptions. All code is audited and peer reviewed before deploying to production servers. We also monitor updates from the security community and immediately update our systems when vulnerabilities are discovered.

Disaster Recovery

Customer data and application source code are automatically backed up daily. Backups are retained for 7 days or such time as specified by clients to recover in the event of a disaster.

Incident Response

In the event of a security breach, our team will promptly notify you of unauthorized access to your data. Service availability incidents are published to our status page with additional information.

Security Policies

All employees are governed by documented strict security policies covering acceptable use, customer data, and encryption standards with Senior Management responsibility. If you would like to request a copy of these policies, please contact your account manager.

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Physical Security Policy

The building is secured by the Daily Mail Group or their agents, who provide general security to the Building with a central control to monitor and survey all entrances exits and Common Parts.

The Tabled office operates a card access system to the workplace areas. Photographic electronic cards are issues to each employee to give enable access. Employees are required to accompany all visitors around workplace areas and to not leave them unsupervised.

Employees are also required to lock their computers when not attending them.