Proquro Case Management System

Service Definition Document

G-Cloud 15 (RM1557.15)

Lot 2b – Cloud Software (SaaS)

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Company Overview

Master Software Solutions Ltd. brings a fresh, agile approach to digital service delivery, helping public sector and regulated organisations work smarter and more efficiently. With over a decade of hands-on experience, our team understands the challenges of managing complex, sensitive and time-critical processes, which is why we created Proquro: a configurable platform that supports consistent case management from start to finish.

We know that every organisation is unique, and as a micro-organisation ourselves, we ensure our services are always affordable and tailored to your needs. Our lean structure means you get great value without compromising on quality. We're passionate about forming lasting relationships and making advanced solutions accessible, so you can focus on delivering real results for your community.

Proquro Platform Overview

Introducing Proquro, an intelligent, joined-up case management platform for public sector and regulated organisations. Proquro helps teams capture, assess, manage and resolve cases through configurable workflows. From initial contact and triage through investigation, action, review and closure, the platform brings structure, visibility and accountability to complex processes.

Proquro supports evidence-based case assessment and decision-making. Users can record enquiries, observations and supporting information, complete structured assessments, and maintain a comprehensive case record containing risks, decisions, documents and contextual factors in one secure place. This helps organisations apply their policies consistently and take appropriate action at the right time.

What sets Proquro apart is its flexibility and control. Organisations can configure forms, assessments, workflows, stages, thresholds and permissions to reflect their policies and operating model. Case management tools allow teams to assign ownership, plan and track actions, monitor progress, manage documents and collaborate across roles while maintaining clear accountability.

Proquro keeps case information organised and auditable. Records, documents, decisions and actions are securely stored with full audit trails, supporting governance, assurance and regulatory requirements. Dashboards and reporting give authorised users insight into caseloads, status, outcomes, service pressures and performance, helping inform operational and strategic decisions.

With a modular design, Proquro adapts to different services and operating models without unnecessary complexity. By bringing case intake, assessment, workflow,

actions, documents, communications and reporting together, Proquro helps organisations improve consistency, reduce administrative burden and deliver better managed services.

Optional Add-ons

Extend Proquro Case Management with optional add-ons that support greater efficiency, insight and organisational scale. Select the capabilities that fit your requirements and add further functionality as your service needs evolve.

Multi-Organisation Case Management Bundle

Ideal for organisations delivering case management across multiple departments, services, locations or partner bodies, the Multi-Organisation Case Management Bundle provides connected but appropriately segregated environments. Authorised teams can view information at organisation, service or group level, supporting consistent processes, consolidated reporting and central oversight while maintaining role-based access and accountability.

Choose the Proquro modules that best fit your organisation's needs—individually or as part of a discounted bundle—and create a solution that maximises efficiency, compliance, and value. Our customer-centric approach ensures you only invest in the features you require, with the flexibility to adapt as your needs change.

AI Enabled Case Notes

With Proquro's AI Enabled Case Notes, authorised users can record case notes by voice, allowing the system to capture and summarise key details and help populate the relevant case forms. This streamlined approach reduces administrative effort and helps teams maintain timely, consistent records. Voice-recorded information is securely stored with an audit trail and remains subject to user review and organisational controls.

AI Enabled Assessments

AI Enabled Assessments support organisations in completing structured assessments more efficiently through AI-assisted summarisation, content generation and data extraction. Assessment workflows remain fully configurable and all AI-generated content remains subject to user review and approval.

Analytics & Reporting

Proquro Reporting offers accessible tools for analysing, visualising and sharing case data to support informed decision-making. Pre-configured dashboards provide insight into caseloads, workflow stages, actions, service levels and outcomes, while custom

dashboards can be configured for additional organisational needs. A range of visualisation options and a secure, scalable architecture help teams monitor key metrics and respond to changing service demands.

Knowledge Portal

The Knowledge Portal provides a self-service repository for policies, guidance, procedures, forms and supporting documentation. Content can be published centrally and made available to users through a searchable interface, helping organisations improve consistency and reduce reliance on manual guidance processes.

Third-Party Integrations

Proquro can integrate with commonly used organisational tools to support joined-up case management. Integrations can include DocuSign for eSignatures and SharePoint for document management, helping authorised users keep case records organised and accessible.

Where required, Proquro can be configured to exchange data with relevant line-of-business systems, directories and external services. Integrations are scoped to the buyer's requirements, security model and available interfaces, with implementation guidance provided throughout delivery.

Key Benefits

- Provides a single, structured case record for enquiries, assessments, decisions, actions, documents and communications.
- Automates configurable workflows, assignments, notifications and reviews to improve consistency and reduce administrative effort.
- Gives authorised teams dashboards and reporting across caseloads, status, service levels, risks and outcomes.
- Supports role-based access, clear ownership and complete audit trails for governance, assurance and accountability.
- Allows organisations to configure forms, stages, thresholds, permissions and terminology around their policies and services.
- Supports modular adoption, so buyers can start with the capabilities they need and extend the service as requirements evolve.
- Provides structured onboarding, role-focused training and ongoing support to help teams adopt the platform confidently.

Implementation (Onboarding)

The Proquro implementation is designed to make your onboarding experience as smooth and straightforward as possible. We configure your selected modules and adapt the platform to your organisation's specific requirements, ensuring everything aligns from day one. User accounts are established with appropriate role-based access, and suitable training options are available to help users get up and running confidently.

A standard setup fee applies as detailed in the Pricing Document and covers the core implementation activities required to deploy Proquro successfully. This includes discovery and requirements gathering, platform configuration, user acceptance testing (UAT), project management, go-live planning and transition support.

Throughout the implementation, responsibilities are clearly defined. Our team manages technical delivery, platform configuration and implementation activities, while your organisation provides timely access to required data and facilitates engagement with relevant stakeholders.

Where required, data migration services can be provided and may be charged separately depending on the source systems, volume and complexity of the migration. Additional training, bespoke configuration and customisation services are also available and may incur additional charges in accordance with the Pricing Document.

Project Management

You'll have a dedicated project manager as your main point of contact, coordinating delivery, hosting regular progress meetings, and ensuring open communication at every step. Timelines for onboarding are based on your chosen modules and specific requirements, with clear milestones agreed in advance so expectations are managed at every stage.

What's Included in the Implementation

Your implementation package covers everything you need for a smooth transition to Proquro:

- Complete configuration of selected modules
- Onboarding of users with tailored access
- Provision of supporting documentation
- Coordination of any separately purchased user training sessions.
- Ongoing project management and regular progress reviews
- Technical support available throughout the implementation journey
- Post-launch review, warranty support, and a smooth transition to ongoing support services

Training

Proquro's training programme is designed to empower every user group—from standard users to system administrators—with confidence in the platform's features. Expect role-focused workshops, interactive demonstrations, and comprehensive user guides, all fitted to the practical needs of your organisation. Support doesn't stop after launch; our dedicated helpdesk, technical assistance, and regular system updates mean you're always covered. Continuous enablement is assured through refresher sessions and an online knowledge base, helping your teams stay up to speed as Proquro evolves.

Customer Support

Standard customer support is included within your annual licence fees and is aimed at resolving application faults, login difficulties, and access issues swiftly. For organisations seeking enhanced engagement, our premium support and advisory services go further, delivering proactive, hands-on guidance to help your teams maximise system performance. This includes management of users and roles, supplementary training sessions, updates to reports and dashboards, modifications to custom fields, bulk data updates, and scheduled quarterly review meetings to support your solution continues to meet evolving organisational needs. Our team is always ready to assist with any queries or requests for system enhancements. Please note, support hours operate on a "use it or lose it" basis, with unused hours not transferrable to future periods.

All customer support is accessible via email, ensuring every request is promptly logged in our support system. Incoming support tickets are triaged and assigned a severity level in line with our impact matrix, and progress updates or resolutions are delivered according to the service level matrix outlined in our standard terms and conditions.

Table 1: Service Level Matrix

Severity	Acknowledgement	Resolution
Urgent	1 business hour	4 business hours
High	4 business hours	12 business hours
Medium	2 business days	4 business days
Low	5 business days	10 business days

Table 2: Impact Matrix

Severity	Description
Urgent	The application is inoperable or a core function of the application is unavailable
High	A core function of the application is significantly impaired
Medium	A core function of the application is impaired, where the impairment does not constitute a serious issue; or a non-core function of the application is significantly impaired
Low	Any impairment of the application not falling into the above categories; and any cosmetic issue affecting the application

Hours of Operation

Support is available Monday to Friday, 9:00 AM–5:00 PM UK time, excluding UK Bank Holidays.

Location of Support

Support team is based in Reading, UK

System Updates and Upgrades

Routine system maintenance and upgrades are included in your annual licence fees, ensuring your solution remains up-to-date, reliable, and aligned with your organisation's needs.

All system updates and planned upgrades will be carried out outside of business hours, with the aim to provide at least two weeks' notice for any scheduled maintenance. In the event of emergency updates, these will also be performed outside of business hours, albeit with a shorter notice period where necessary.

Scalability

Scalability is at the heart of Proquro's design. As your organisation's requirements change and your ambitions grow, Proquro grows with you—no fuss, no disruption. Whether you need to add new users, adjust permissions, or request changes to your account setup, you can do so quickly and efficiently via intuitive admin controls or simple account management requests. These combined capabilities ensure your team always has the right tools on hand, keeping your processes running efficiently no matter how your needs evolve.

Change Management

A dedicated account manager will be assigned to you, providing regular meetings and acting as your main point of contact. Any configuration changes are managed through formal change requests, with a clear quote provided for approval. Once approved, our team will prioritise and deliver the changes, keeping you updated on progress throughout.

Data Protection and Compliance

Data Security Measures

Proquro places the highest priority on safeguarding all personal and sensitive data, implementing rigorous security measures throughout. These include routine security assessments, comprehensive encryption of data both while in transit and at rest, and robust access controls designed to prevent unauthorised access or data breaches.

Data is hosted securely on the Microsoft Azure platform, with the UK South Region as the primary storage location and the UK West Region designated for backup. We employ TLS encryption to protect data during transmission and storage, ensuring your information remains secure at every stage. Regular backups within Azure further support business continuity and the ongoing protection of your data.

Buyer-enabled third-party services are assessed as part of implementation and treated in accordance with the applicable data-processing responsibilities. We maintain a current sub-processor list and provide notice of relevant changes.

To uphold our security standards, annual vulnerability assessments (penetration testing) are performed by independent third-party specialists, with reports available upon request. Data remains securely stored within Proquro for the duration of your contract. At contract completion, information is returned to the client in line with established exit procedures, and all residual data is promptly and securely erased from our systems, guaranteeing confidentiality and full compliance with data protection requirements.

GDPR and Data Protection

Master Software Solutions Ltd. is officially registered with the Information Commissioner’s Office (ICO) as a data processor and holds Cyber Essentials Plus certification. The company has appointed a dedicated Data Protection Officer (DPO) to oversee all aspects of GDPR compliance. Additionally, every employee receives thorough training in data protection, ensuring a robust commitment to privacy is embedded throughout the organisation.

Exit Procedures

When concluding your service or offboarding from Proquro, a well-defined exit procedure is observed to facilitate a seamless transition and uphold the security of your data. All user accounts linked to your organisation will be promptly disabled, with platform access withdrawn as outlined in your contract. Clients are offered secure data export facilities, enabling safe retrieval of all information prior to the closure of accounts. Any remaining data will be thoroughly and securely erased from our systems in compliance with relevant data protection standards, and confirmation of deletion can be provided upon request. We recommend coordinating closely with our support team to agree timelines and ensure all offboarding requirements are comprehensively addressed.

Scope and Formats
Exports are supplied in JSON by default, with CSV available on request, to meet open, vendor-neutral handover needs and ensure compliance with data ownership and exportability requirements.

Document Export and Structure
All associated documents are exported in their native formats and organised in a deterministic folder hierarchy using Case Reference. A cross-reference file links each document to its metadata (version, type, effective dates) to preserve provenance and enable rapid ingestion by the successor solution.

Technical Architecture

Proquro operates as a multi-tenant, cloud-native SaaS platform hosted on Microsoft Azure in UK regions. The platform is accessed via a modern web browser over TLS, with identity handled through a segregated identity tenant and multi-factor authentication. The core services are stateless and scale horizontally; documents are stored in durable object storage; transactional data is stored in a managed relational database; integrations are isolated in a secure integration tier; and reporting is delivered through read-optimised data access that does not impact production workloads.

Standards compliance and client environment

- HTML5 browser UI with responsive design for desktop/tablet/mobile; no plugins required.
- Supported browsers: Microsoft Edge (current) and Google Chrome (current). Other modern browsers may function on a best-efforts basis but are outside formal support scope.

- Strict TLS 1.2+ everywhere; authenticated SMTP relay with SPF/DKIM/DMARC for mail integrity.
- Designed to meet WCAG 2.1 AA; accessibility statement is available at https://help.proquro.co.uk/accessibility-statement/

Resilience and redundancy

- **High availability:** The web tier is stateless and runs across multiple instances; ingress layers (Front Door, WAF) are redundant; storage and database services are platform-managed for SLA-backed availability.
- **Regional resilience:** Primary hosting is in **UK South** with disaster-recovery protections in **UK West**. Databases and object storage are configured with geo-redundant protection (geo-replicated backups for SQL; GRS for Blob).
- **Operational safeguards:** Health probes, auto-scale, and synthetic transactions detect and remediate service degradation. Release deployments include smoke tests and back-out checkpoints to avoid unnecessary downtime.
- **Availability target: 99.9%** service availability, with planned maintenance performed outside core working hours and change windows coordinated to avoid critical deadlines.
- **Disaster Recovery (RPO/RTO):** Hot-Cold DR strategy. Target RPO 30 minutes and RTO 24 hours under a declared disaster situation, supported by Azure backups and DR procedures.

Data backup, retention and archiving procedures

Backups

- **Azure SQL**: automated backups with point-in-time restore; daily full, differential and frequent log backups retained to meet contractual retention.
- **Azure Blob Storage**: versioning and soft-delete enabled; geo-redundant storage (GRS) protects against regional incidents.
- **Frequency & scope:** Daily backups with additional snapshots around major releases; integrity checks are verified and restoration is periodically tested.

Security, access control and information governance

- **Segregation & tenancy:** Each contracting authority's data is logically segregated, with strict access controls applied throughout the platform.
- **Access control:** Role-based permissions, such as Administrator, Case Manager, Case Officer, Approver and Read-only User, with configurable access at case, team, service and organisational level. Multifactor authentication is supported.

- **Encryption:** Data in transit via TLS 1.2+; data at rest encrypted by platform keys; customer-managed keys can be supported if required.
- **Patching & hardening:** Platform and dependencies are kept in support; security updates follow a controlled, out-of-hours pipeline.
- **Logging & audit:** Every material case-management action, including case creation, assignment, assessment, update, approval, communication and closure, is recorded in an audit timeline and can be exported where required.
- **Email integrity:** Authenticated SMTP relay with SPF/DKIM/DMARC aligned to reduce spoofing.
- **Compliance:** UK GDPR aligned processing; ability to respond to data subject requests; test/sandbox environment provided for training; helpdesk SLAs and escalation procedures in place.

Contact Information

To schedule a demo, please contact info@mastersoftware.co.uk