



G-CLOUD 15

Service Definition

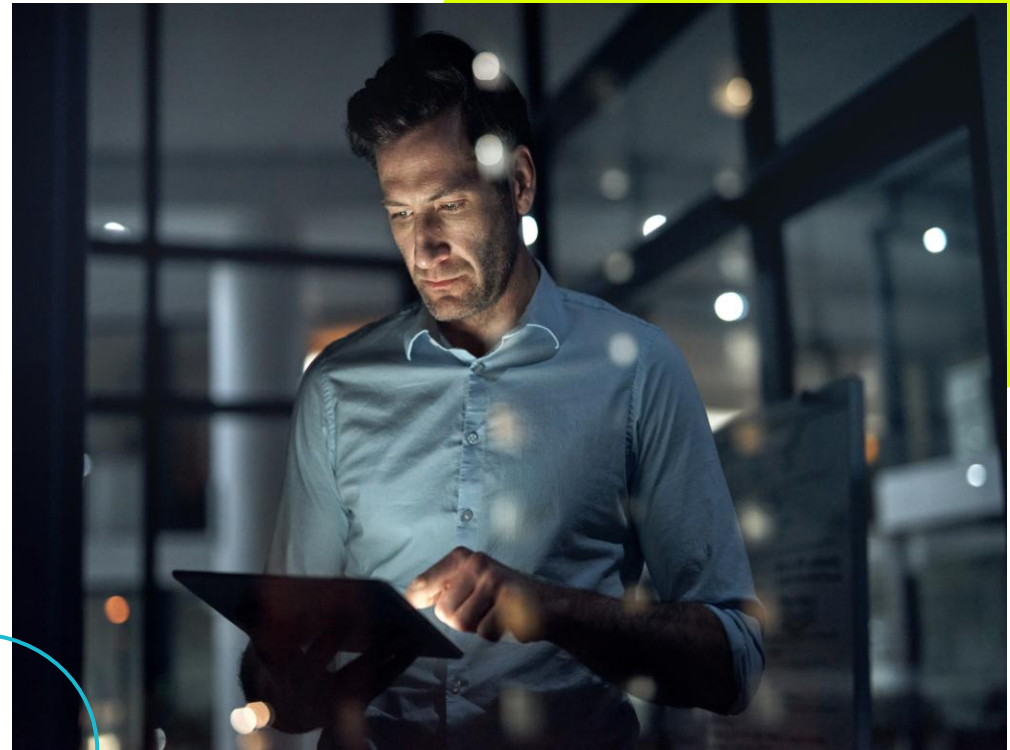
Perito

Public Sector Case Management

its.

Perito

- Solution Overview
- Solution Detail
- Business Need
- Case Study
- Our Services And Assurances



Solution Overview

Perito™ Public Sector Case Management

At ITS we've been living and breathing case management for over 20 years. We understand that compliant case management depends on meeting requirements and legislative demands. Trust us to provide the right solution and process for you **whatever your domain**.

ITS have a strong history of delivering case management solutions to public sector organisations. **Our cross sector work has enabled us to deliver solutions across a range of case management specialties.**

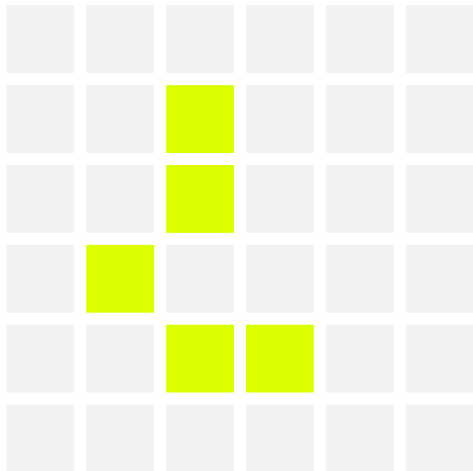
1. Complaint Management
2. Forensic Management
3. Inspection Management
4. Investigation Management
5. Ombudsman Services



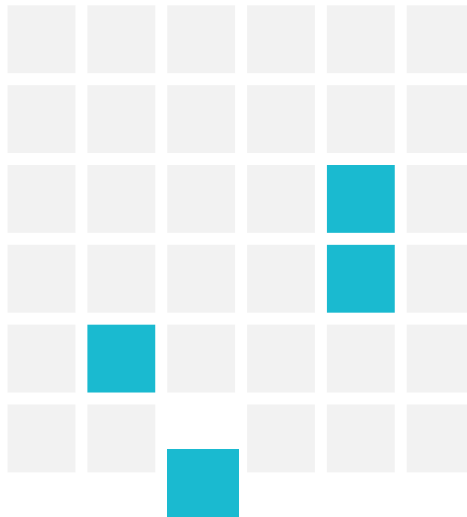
6. Health and Safety
7. Rates and Tax Collection
8. Regulatory Management
9. Insolvency Management
10. Fitness to Practice Management

Perito is the public sector case management solution from ITS. Built with modular blocks, you can configure a case management solution to your specific requirements or have additional blocks added to meet your unique business requirements. Perito is fully compliant with GDS and NICS design and implementation guidelines, and can be hosted either in the cloud, or on-premises.

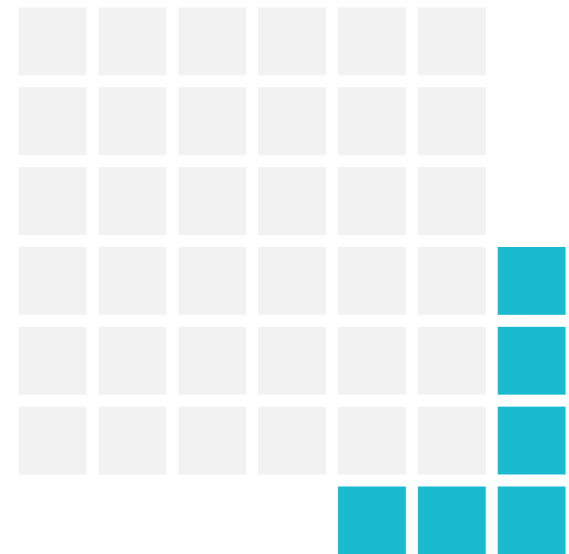
Configure



Change



Construct



Perito gives you the flexibility to change a module to meet your needs or build additional modules to meet the unique challenges your organisation faces.

Perito Components

Perito is made up of 5 components. A core case management module and 4 optional modules providing enhanced citizen interaction and capability.

- **Perito – Case Management Solution**

Our modular, off the shelf case management solution to manage process automation, governance and interaction with people.

- **Perito Portal**

A stand-alone citizen engagement portal which can be used in conjunction with Perito or on a stand-alone basis. Public facing and bringing citizens or authorised users into the heart of case processes.

- **Perito Report Studio**

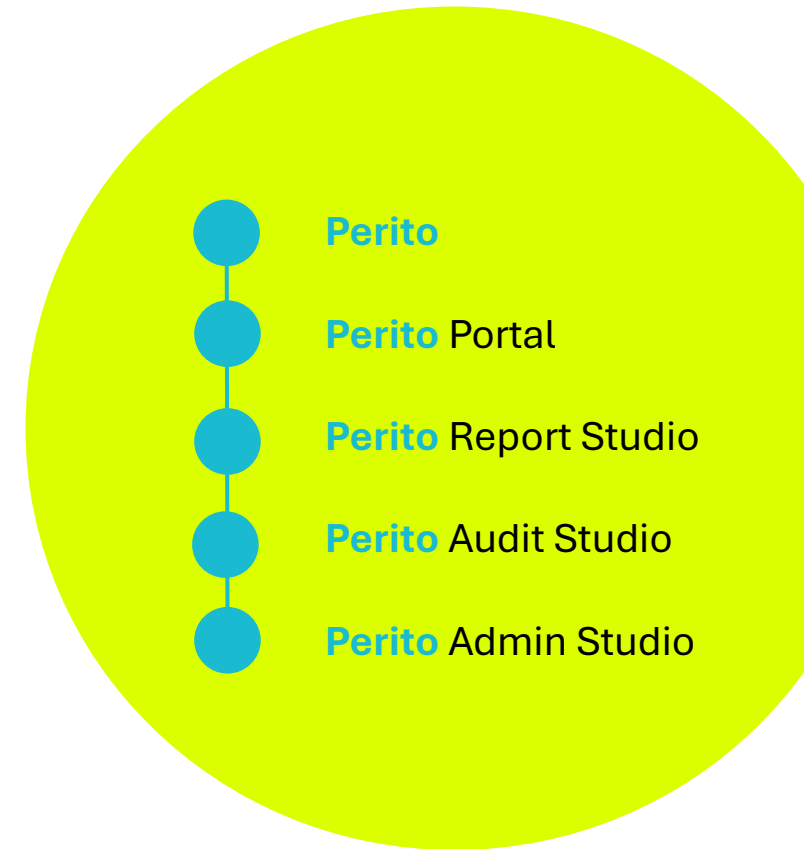
Simple, configurable out of the box graphical dashboard and report configuration within the Perito dataset.

- **Perito Audit Studio**

An accessible UX for access to all Perito audit detail. Know who is accessing your solution when, where and why.

- **Perito Admin Studio**

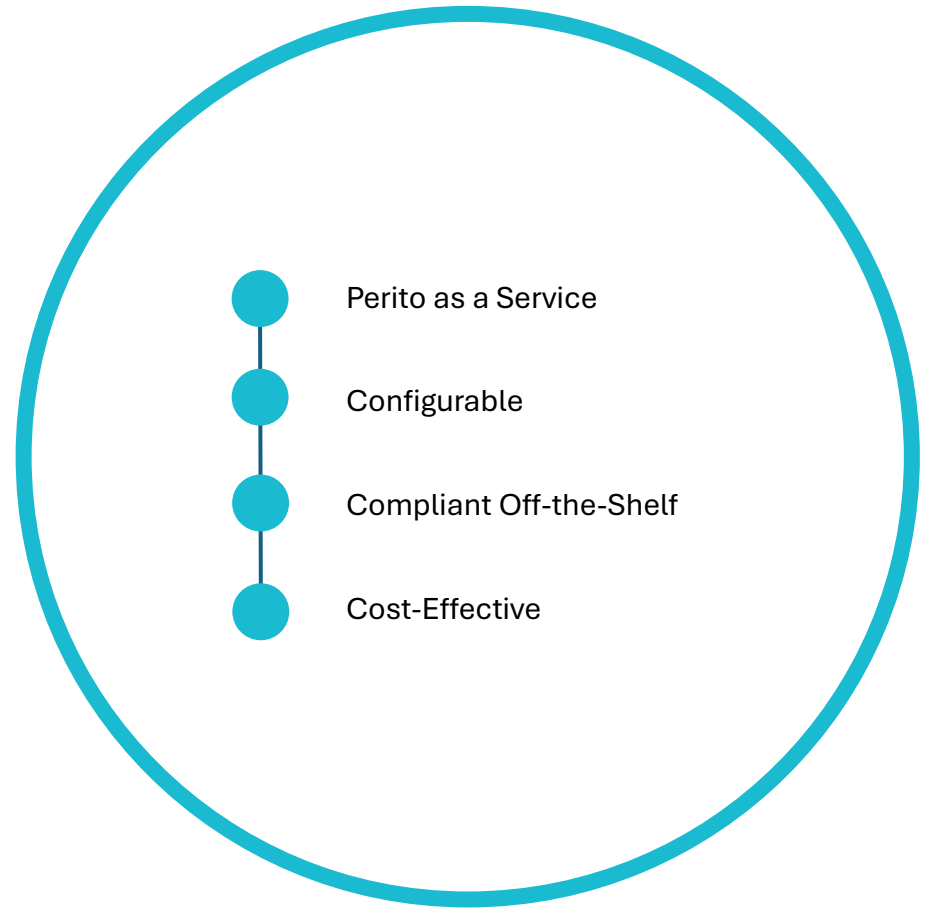
Self-Service by default. Fully manage your Perito solution without the need for Supplier intervention.



Solution Detail

Perito increases accessibility, automates processes, provides flexibility and drives efficiency across organisations, assisting outcomes to be achieved as fluidly as possible.

- **Hosted where you want** – Use Perito as a service (SaaS) in the public cloud, or on a dedicated private cloud tenant. Alternatively deploy on-premises in your own data centre.
- **Configurable to your requirements** - Perito provides organisations with a high level of modular configurability out-of-the-box, allowing flexibility in designing a platform to suit your specific needs.
- **Compliant off-the-shelf** - Perito is fully compliant with GDS and NICS design principles and is available to buy direct via Government procurement frameworks.
- **Cost-effective** - Built with modular blocks, Perito delivers a platform tailored to your needs, without the need for expensive custom design work.



- **Accessible UX**

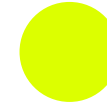
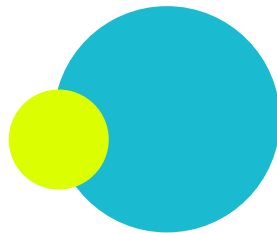
Perito's user-intuitive dashboard is designed and UX tested to utilise existing user skillsets made familiar through social media and search engines like Facebook and Google.

Cases, tasks and people are automatically shown in the feed dependent on priority, ownership, requests to follow and recently updated changes.

Perito is WCAG compliant and accessible across multiple devices.

- **Easily Track and Manage Cases**

Client defined case types (Complaints, investigations, Inspections etc.) hold all the information about a case in a single place. The timeline shows all actions carried out against a case or associated party in chronological order.



- **People First**

Parties are the people and organisations defined within your system. View and edit party details, communications, meetings, and associations to cases and other parties.

- **Simple Task Management**

Define a series of milestones that occur as part of a case process, helping you manage and complete a set of tasks.

Users are given the freedom to determine their tasks, ranging from simple 'To Do' items, or can be part of a sequential workflow, dependant on one another.

Tasks can be used for automation (by instigating automatic actions like an RPA process, document bundling or Artificial Intelligence outputs) or governance (ensuring and recording that actions are carried out in a timely manner).





100% Client Configurable

Define your own:

- Case types
- Fields
- Processes
- Parties
- Users
- Permission groups



A solution to suit your needs

- Substitute modules and screens for client specific requirements
- Build additional modules and screens to meet complex functional requirements
- Share data via built in API connectors to other solutions and data sources



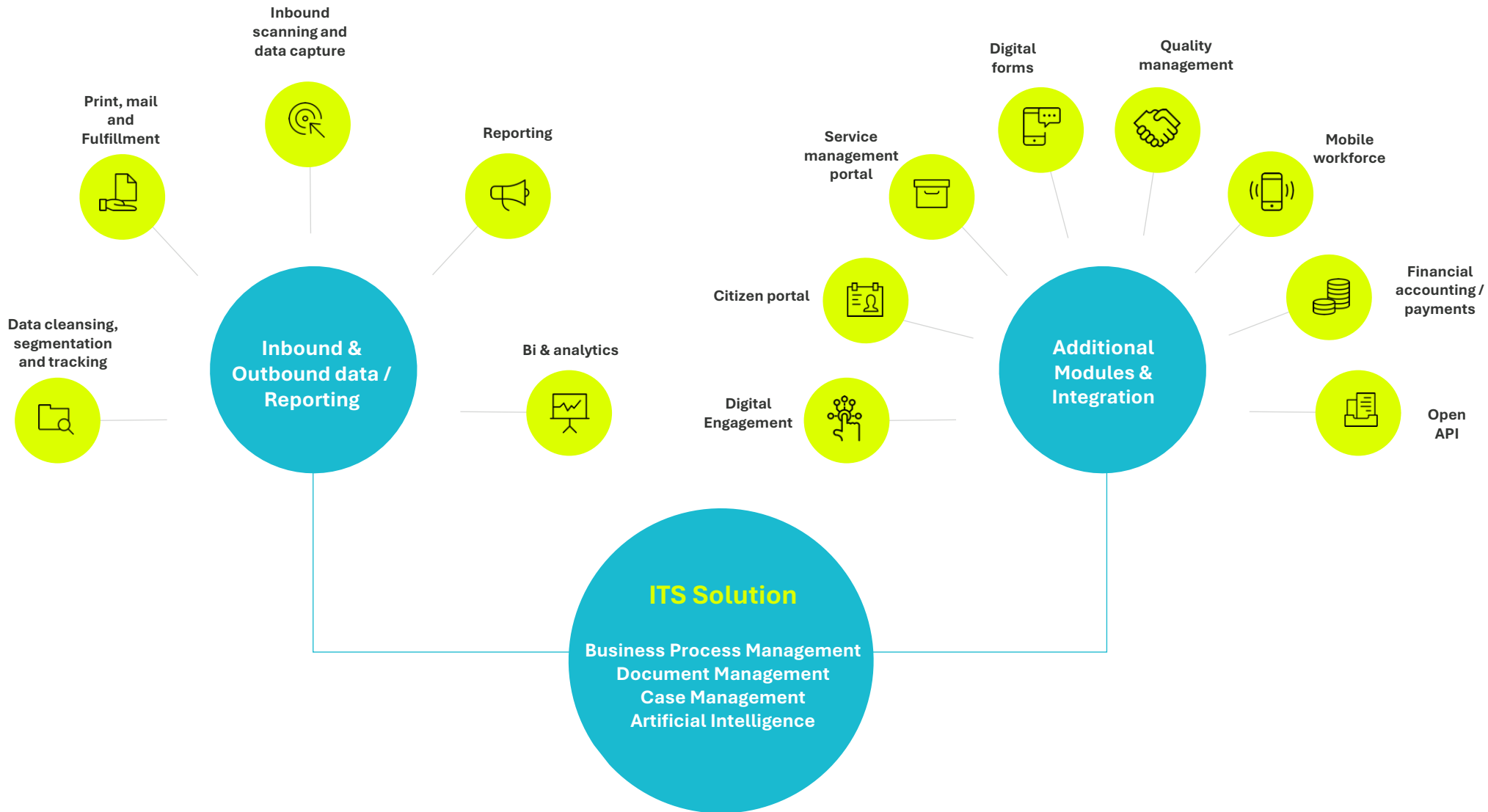
Agile Process Management

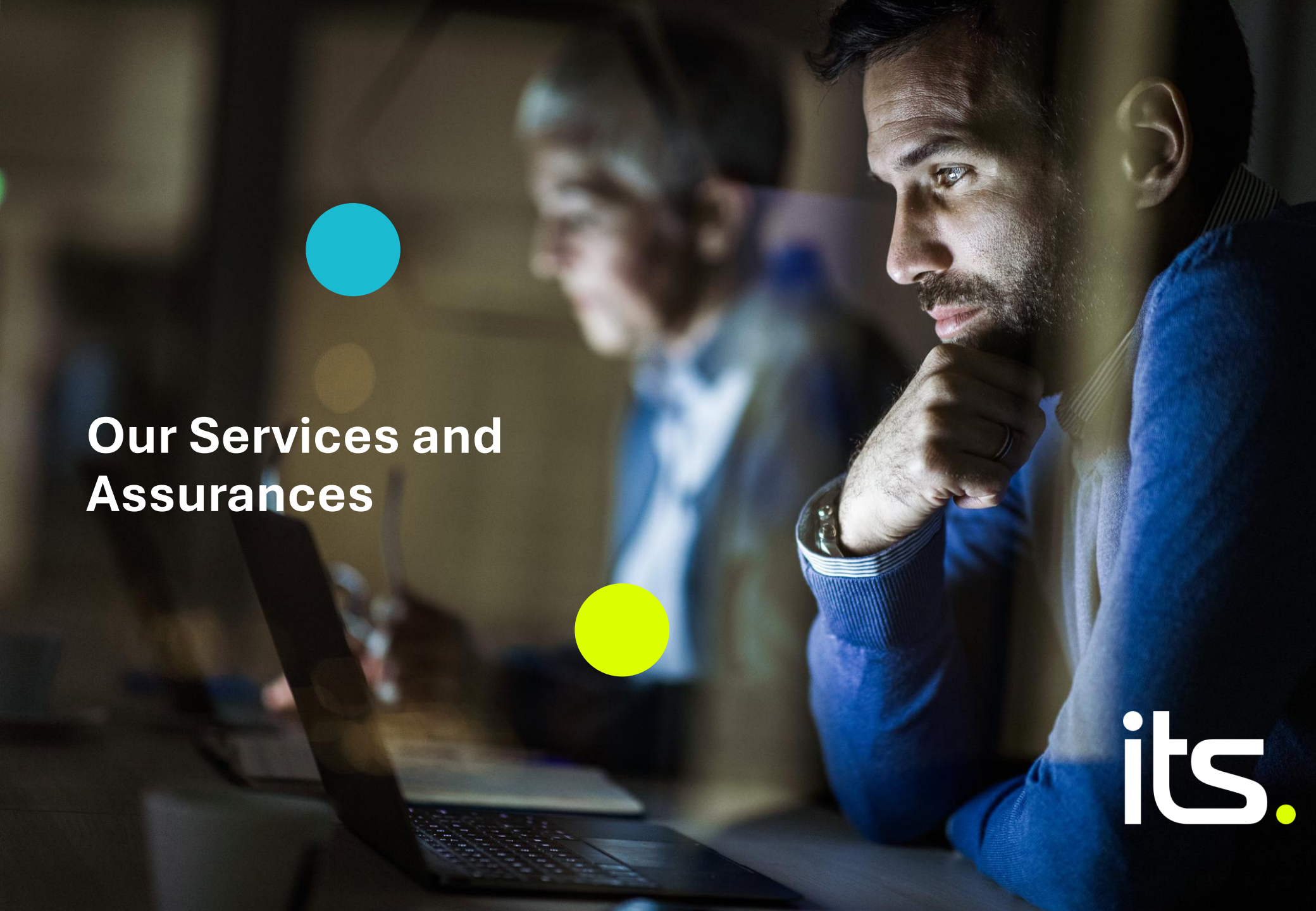
- Client configurable cases with associated tasks and milestones
- Secure your system with permission based roles
- Choose between independent 'to do' tasks, or sequential 'workflow' tasks



Cross Device and Cloud

- Hosting provided in line with GDS and NICS Enterprise Architecture guidance
- Public cloud as a service (Microsoft Azure)
- On-premises hosting (IT Assist / Crown / Private Cloud)
- Accessible from all desktop and mobile browsers



A photograph of two men in a dimly lit office. In the foreground, a man with dark hair and a beard, wearing a blue sweater, is looking intently at a laptop screen. His hand is resting on his chin in a thoughtful pose. In the background, another man with grey hair, wearing a light blue shirt and a dark jacket, is also working on a laptop. The scene is illuminated by the soft glow of the laptop screens, creating a professional and focused atmosphere. Two large, semi-transparent circles, one cyan and one yellow, are overlaid on the image. The cyan circle is positioned above the text, and the yellow circle is positioned below it.

Our Services and Assurances

its.

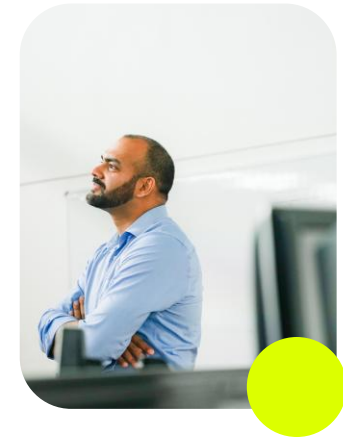
What we do

ITS specialises in delivering secure, robust digital solutions for the UK public sector, with deep expertise in case management, citizen-facing portals, and workflow optimisation. With over 60 years' experience, we help public bodies manage complex information, streamline processes, and improve outcomes for both staff and citizens.

Our strengths include:

- **Specialist Solutions:** We design and implement advanced case management systems, intuitive public portals, and digital workflows tailored to the needs of government, regulatory, and justice organisations.
- **Trusted Track Record:** Our solutions are trusted by leading bodies including the Insolvency Service, Land & Property Services, and the General Optical Council—supporting the secure handling of sensitive, high-volume data.
- **End-to-End Service:** From requirements discovery and system migration to implementation, user training, and ongoing support, we deliver a complete service focused on operational efficiency and compliance.
- **Security and Compliance:** All ITS solutions are aligned to ISO/IEC 27001, Cyber Essentials, and UK data protection standards, and offer flexible deployment options to meet government requirements.

ITS is the trusted partner for public sector organisations seeking to modernise services, enhance citizen engagement, and achieve measurable improvements in efficiency and transparency.



Who We Work With

We deliver transformation to key government departments and public sector bodies and agencies across the UK, including:



Transforming Public Services Through Digital Solutions

ITS enables public sector organisations to deliver accessible, efficient, and compliant digital services that make a tangible difference to citizens and staff.

What we do:

- **Modernise legacy systems:** Replace manual and paper-based processes with secure, digital workflows that reduce errors and administrative burden.
- **Enhance citizen engagement:** Build intuitive, user-centred portals for public access, case tracking, self-service, and digital communications.
- **Optimise staff productivity:** Automate repetitive tasks, streamline approvals, and provide real-time case oversight, enabling staff to focus on complex, value-added work.
- **Strengthen compliance and auditability:** Ensure every step of a process is traceable, auditable, and aligned with regulatory and security standards.
- **Integrate and connect:** Seamlessly connect with existing systems, data sources, and external agencies to support joined-up public services.
- **Adapt to changing needs:** Rapidly implement new policies, statutory requirements, or service improvements with flexible, configurable digital solutions.



Our Specialist Services



1. Design & Consultancy

- **Solution and Technical Architecture:** Our architects work with you to design secure, scalable cloud solutions that align with your operational, policy, and regulatory needs.
- **Business Analysis & Process Redesign:** Experienced business analysts use workshops, user stories, and process mapping to ensure digital services are user-centred, efficient, and future-proof.



2. Implementation & Integration

- **Application Development & Configuration:** We build, customise, and integrate applications on leading cloud platforms, including Microsoft Azure, Dynamics 365, and SharePoint. Our solutions support a wide range of business needs, from case management to citizen portals.
- **Data Migration & Legacy Modernisation:** Specialist consultants use best-practice ETL processes to migrate data securely and accurately from legacy systems, ensuring continuity and data quality.
- **System Integration:** Seamless integration with third-party systems and government platforms to support end-to-end workflows and information sharing.
- **Testing & Quality Assurance:** Accredited testers apply manual and automated testing methodologies to ensure security, performance, and regulatory compliance.

Our Specialist Services



3. Transition, Service Management and Support

- **Project & Transition Management:** Projects are managed using a combination of Agile and PRINCE2 frameworks, ensuring projects are delivered on time, within budget, and with strong governance.
- **Service Management:** Our ITIL-aligned service desk provides responsive incident, change, and problem management. Regular reviews, reporting, and proactive improvements help ensure service reliability and alignment with business objectives.
- **Planned Maintenance & Continuous Improvement:** We schedule maintenance to minimise impact and continuously review performance to optimise value, resilience, and user experience.

How We Work With Customers

ITS is committed to building lasting partnerships with our customers—delivering secure, modern solutions that create public value and support your long-term goals.

- **Collaborative Partnership:** We work as an extension of your team, taking time to understand your challenges, priorities, and policy context. Early engagement, workshops, and regular communication ensure shared understanding and alignment from day one.
- **User-Centred Design:** Our solutions are shaped by the needs of end users—citizens, staff, and stakeholders. We use a mix of agile and structured methods to co-design services that are accessible, efficient, and compliant.
- **Experienced Teams:** ITS brings together specialists in business analysis, technical architecture, cloud engineering, project delivery, and support. Our teams are experienced in regulated, high-volume environments and deliver practical, evidence-led solutions.



How We Work With Customers

- **Agile and Flexible Delivery:** We adapt our delivery approach (agile, hybrid, or waterfall) to fit your organisation's culture and project needs, providing early visibility, rapid feedback, and smooth change management.
- **Transparent Project Management:** Projects are governed using established frameworks (PRINCE2, Agile), with clear milestones, risk management, and progress reporting. We prioritise open communication and “no surprises” delivery.
- **Focus on Outcomes:** Every project is measured by tangible results—improved processes, measurable efficiencies, better user experiences, and compliance with government and legislative standards.
- **Long-Term Support:** Our engagement doesn't end at go-live. We provide proactive service management, continuous improvement, and regular service reviews to ensure your digital services evolve with your needs.



Secure, Flexible Hosting to Meet Public Sector Needs

ITS solutions are designed to support a full range of deployment options - including secure cloud, on-premise, and hybrid models, to align with each organisation's security, compliance, and operational requirements.

Hosting options we support:

- **Cloud-Based Hosting**

- ITS is a Microsoft Azure specialist, offering secure, scalable solutions hosted in UK/EU data centres, compliant with public sector security and data residency requirements.
- Our Azure-based services benefit from advanced security, resilience, disaster recovery, and business continuity options.
- Cloud hosting supports rapid scaling, regular feature updates, and secure remote access for distributed teams.

- **On-Premise Hosting**

- For clients with specific data residency, integration, or security requirements, ITS provides fully supported on-premise deployments.
- We work collaboratively with your IT team to design, configure, and manage the required infrastructure, ensuring robust security, resilience, and compliance.
- On-premise options allow organisations to retain full control over their environment and integration with existing local systems.

Service Management and Support

Service Management

ITS provides dedicated Service Managers who act as a single point of contact for each service, ensuring clear accountability, effective communication, and consistent service delivery. Our Service Managers manage the day-to-day coordination of the ITS support function, oversee incident resolution, and provide regular status updates alongside comprehensive monthly service reports.

Our service management approach is aligned with ITIL best practices and places strong emphasis on incident, problem, and change management, ensuring services are stable, resilient, and well governed. ITS coordinates the scoping, planning, costing, and delivery of change in a controlled manner, supporting service improvement while minimising risk and disruption.

Continuous improvement is central to our service model, Service Managers identify opportunities to optimise performance, resilience, and value over time. Monthly reporting includes service availability, incident summaries, major incidents, providing full transparency and insight. Regular review meetings are held to agree priorities and actions for future service periods. This collaborative, proactive approach ensures services remain aligned with business objectives while continually evolving to meet changing needs.

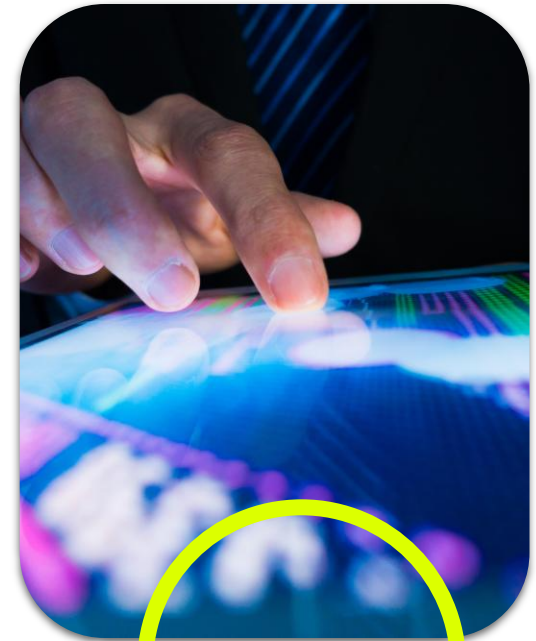
Planned Maintenance and Service Interruptions

Planned maintenance may be carried out by either ITS or the client in accordance with any pre-agreed maintenance timetable, and will, where possible, only be carried out during periods where the availability or performance of the relevant service elements will not be affected.

The pre-agreed timetable can be updated according to requirements at service review meetings. Scheduled interruptions to the agreed service hours will be either standing or ad-hoc arrangements, both of which will be agreed between us.

Service Levels

Service hours will be defined and agreed in line with your operational requirements and required service availability. Service availability will be measured as a percentage of the total time within each service period and reported through the monthly service performance report. Service levels, including response and resolution targets, will be aligned to the agreed priority of incidents to ensure that issues impacting critical services are addressed appropriately. ITS will work collaboratively with you to agree appropriate service schedules and management information, including meaningful performance measures.



Accreditations and Memberships

We deliver transformation
to key government
departments and public
sector bodies and agencies
across the UK, including:



Case Studies

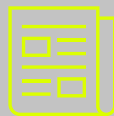


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DIGITALLY TRANSFORMING CITIZEN SERVICES FOR A ○ BETTER FUTURE.

Land and Property Services

Land and Property Services (LPS) partnered with ITS to implement a fully managed service and customised rate collection system which includes software provision, hosting, disaster recovery, printing, payments handling and debt collection.



900,000

Rates are collected on properties across Northern Ireland.



84.5%

We verified and traced 84.5% of end dated accounts.



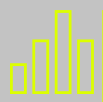
700,000

From 700,000 rate payers.



27,478

Helping to generate new rate demands for 27,478 properties.



£1.2 billion

Generating in revenues for the Northern Irish Executive.



£13.5 million

Generating an extra £13.5 million in revenue for the Northern Irish Executive.



DIGITALLY TRANSFORMING CITIZEN SERVICES FOR A BETTER FUTURE.

UK Central Government

ITS created a document and records management solution for a UK central government department, with the dual aims of increasing collaboration and meeting compliance obligations. This would be followed by the management of the overarching document and record Management capability and use of SharePoint across the department's tenant.

- ITS's fully managed EDM solution replaced the HP TRIM platform and included migration of all retained records to a MS SharePoint environment – Data is now managed and retained data to **IL3 (Restricted)**
- Utilisation of Office 365 components in a controlled manner to provide a departmental wide content management solution scalable to **80,000 users**
- **60TB** of information successfully migrated from file shares to SharePoint online
- Utilisation of repeatable template based Information Architecture designs in conjunction with RecordPoint Records 365 for flexibility and comprehensive record management.
- Digital content management Strategy implemented – further rollout of portals and templates across its HQ user base of **37,000 users**
- Increased usage of the core EDM solution **1,500 to 37,000** Users due to a simpler platform and classification



UK Investigation Body

ITS partnered with a UK Investigative office to develop a complaints management system, enabling for the efficient management of complaints from receipt through to resolution and reporting.

- ITS developed a comprehensive case management solution leveraging the power of the customised Dynamics 365 cloud based customer service portal.
- The construction of an online platform permitted members of the public who wished to make a complaint to register and lodge their grievance. Once submitted, complainants were able to check on the progress of a complaint and receive regular updates on the status of their complaint via the organisations online portal or through email updates as the case progresses.
- Workflows helped automate tasks such as document and email generation, document approval cycles, automatic upload of documents from Dynamics 365 to SharePoint Online and various key performance indicators (KPI).
- The custom-built platform written within the confines of Microsoft code, allowed for the flexibility of the prerequisites to be linked into a fully functional Dynamics 365 solution from Microsoft allowing for the successful launch of an online portal where members of the public could submit complaints with ease and be led through a transparent process to resolution.

Ordering and invoicing

We ask our clients to complete a standard registration/order form. Standard invoicing is on a quarterly-in-advance basis with 30-day payment terms by bank transfer.

Indexation is applied to all Service Management and Support charges upon the first anniversary of the Contract commencing. Indexation will be calculated using the relevant framework specified index, using the difference of the latest 12 months data available or 3.5%, whichever is higher.

A signed call off contract and valid Purchase Order must be received in advance of any work being scheduled or commencing.

While these are our standard terms, we are focused on making engaging with us as simple as possible so can agree other terms if required. If you would like to discuss further options, please contact us.





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