

# Casedoc Court & Justice Case Management

## SERVICE DEFINITION

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# Casedoc Court & Justice Case Management Overview

## A solution for Public Judicial Bodies, Independent Court Institutions and Resolution Committees

**PDMS, in strategic partnership with GoPro, delivers Casedoc, a comprehensive, end-to-end courts and justice software solution.**

Casedoc is a comprehensive, end-to-end courts and justice software solution that enables users to automate and optimise daily work processes. It helps courts improve their services by automating processes, monitoring case activity, and supporting decision making, thus improving the efficiency of the justice sector and promoting case transparency. Casedoc also assists with inter-court communication, case transfers and integration with external entities, assuring secure verification and exchange of data.

It has been developed to provide both out-of-the-box standardisation, yet also provide the flexibility of a fully customisable solution, encapsulating years of development and cumulative experience in digitalisation and automation of justice processes. Casedoc assists with cost reduction and improves work efficiency by cutting down on paper-based processes across court systems.

# Key Features



Provides customised workflows depending on the type of case



Has a robust API



Makes it easy to search for information



Consolidates task management and simplifies scheduling



Provides comprehensive management reports and dashboards



Can be self-managed



Alerts users when action needs to be taken



Automates the external submission of documents or complaints



Eliminates data re-entry in common communications and forms



Offers a secure centralised repository for all case related matters



Leverages Microsoft Office





## Advanced Case Management

Casedoc is a standardised system for centralised operations of documents, judicial processes, running processes, sharing information and inter-team collaboration. The solution is built on an Advanced Case Management Platform providing organisations with core product components including all required case types, workflow, rules, document and record management. Its core case management features allow users to locate any case information, attach various file types and control the entire case process as well as searching for data using many different criteria



## Case Types and Workflow

Many of the processes and workflows of a Case Management System are unique to each individual court and justice administration. Casedoc provides a powerful workflow feature which enables administrators to set up filling, processing, approvals, appeals, reproduction and editing of case documents based on Court and Justice Administration regulations and protocols.



## Task Management and Approval

Casedoc empowers teams to collaborate and work more efficiently and smoothly through the synchronisation of workflow. Users may retrieve all tasks from spreadsheets, documents, emails, next steps and consolidate them all in one place. The result is improved ability to manage multiple complex tasks simultaneously, both for individual cases with multiple needs and requirements, and for multiple projects that have their own particularities.



## Templates Management (word/email)

The solution has an integrated Document/Email Template Manager that makes it possible to generate documents from a template, and thus minimise wasted time and inconsistencies of manually and repetitively written standard texts. Every template comes with pre-defined information fields that are automatically populated with meta-data from the relevant case, such as the plaintiff/defendant, case number and/or other custom preferences. All templates can be linked to case types, workflow, or other specific contexts, to ensure they only appear in the appropriate context. This enables users to easily create and edit various documents and promotes daily communications between administrations, management and stakeholders and reduces significantly any downtime related to particular case processing.



## KPI Dashboard/Reports/Attainment Metrics

Tracking court performance helps to improve accountability, increasing public trust and confidence in the judicial system, and enhancing the rule of law. Casedoc automates the production of customisable reports, lists and charts enabling controlled publication of information as well as increased transparency and accountability. All reports, charts and graphs can be exported to Word, Excel, PDF, etc.



## Online Filing and Collaboration with Third Parties / Stakeholders

Backlogs of unprocessed cases are a major challenge for Court and Justice Administration with limited resources and efficiency. With the online collaboration and self-service portal external stakeholder can enter new case records, update, add supporting material and collaborate with the administration party. This provides the involved stakeholder with excellent service, higher quality of data and improved efficiency.





### **Publishing Process and API for Third Party Publishing**

With a few clicks it is possible to provide valuable information to the public and members and let them track easily critical data to assure on-time decision making. With a dedicated API for public access and on-line filling, justice systems are more transparent and reliable with improved efficiency and credibility.



### **Courtroom Scheduling, Notification and Calendar Management**

The complete calendar feature has two core functions: to show the upcoming schedule, and to prompt users with reminders of important events. It promotes a balanced workflow enabling users to review various time points, such as a specific day, week or month. With a single click, users can verify if a particular date is being linked to a case file, court rooms and personnel. Being available within the system and supporting Outlook integration, it optimises the overview for users, specific groups and supervisors.



### **Transparency and Automatic Judge Allocation**

Casedoc ensures judicial cases transparency and eliminates the potential for bias. AI engine and intelligent system algorithm ensures impartial judge allocation to guarantee objective case proceedings. Casedoc software development is carefully defined and lead by our clear intention to minimise any attempts of intentional malicious interruption of judicial cases that would affect or influence in any way the course or outcome of cases.



### **Recording Transcript, OCR Integration (ABBYY Supported) Verdict API**

Ensuring content can be found and leveraged is essential in any digital environment. Casedoc's integrated OCR solution can convert thousands of unstructured documents into assets that can be easily searched, accessed, leveraged, and extracted for any particular need.



### **Document Storage**

Secure, structured and accessible storage together with keeping track of electronic documents is essential for case processing. As part of a vast feature set of collaboration tools, document management is an inseparable element of improving the efficiency of operational workflow. Casedoc provides secure cloud access to critical case data, with an intelligent document structure that relates each file to a particular case or subject, and a user-friendly interface that allows multiple actions with minimal number of clicks. Fine-grained document access control is fully customisable through a number of permissions which enables a fully transparent track change and document lock when necessary.



# Benefits

Casedoc is a comprehensive, end-to-end courts and justice software solution that enables users to automate and optimise daily work processes. It helps courts improve their services by automating processes, monitoring case activity, and supporting decision making, thus improving the efficiency of the justice sector and promoting case transparency. Casedoc also assists with inter-court communication, case transfers and integration with external entities, assuring secure verification and exchange of data.

It has been developed to provide both out-of-the-box standardisation, yet also provide the flexibility of a fully customisable solution, encapsulating years of development and cumulative experience in digitalisation and automation of justice processes. Casedoc assists with costs reduction and improves work efficiency by cutting down on paper-based processes across court systems.

## Some of the key benefits which ACM provides to Customers:

- **Increased productivity:** Casedoc transforms and optimises a court's processes into automated, configurable, and rules-based workflows. As Casedoc is an end-to-end solution with a rich API for exchanging data or triggering external actions, users have a single central hub for managing court and investigative operations and therefore no longer need to manually integrate different applications to get their job done. The central hub also helps reduce errors from data re-entry while the Casedoc API automates the transfer of data between justice related systems.
- **Autonomy:** In Casedoc, users, with the appropriate permissions, can adjust court and investigative operations as needed thus allowing courts and agencies to cost effectively respond to changes and new judicial, procedural, and societal requirements.
- **Fast time to value:** Casedoc was specifically designed for justice including roles, permissions, workflow, and metadata. In addition, Casedoc users are productive more quickly because information and options are filtered based on the user's role, the type of case, and the specific step within the process.
- **Low total cost of ownership while increasing security and compliance:** Casedoc is built on the Microsoft Azure Cloud, the most advanced Cloud platform in the world. With Azure, Casedoc customers have access to the latest hardware and software, capacity on demand, and the highest level of operational security.
- **Transparent data driven decisions:** By capturing data at granular levels throughout the lifecycle of a case, Casedoc helps organisations track, measure, and visualise key performance targets. The availability of this granular data helps organisations make better decisions and promotes public trust by increasing transparency. As Casedoc provides a centralised system that adheres to prescribed workflows, it is easier to understand how, who, and why decisions are made.
- **Public and external users:** Between Casedoc's e-filing capabilities and Casedoc's API, courts and agencies have multiple options for accepting a citizen's or external party's submission and incorporating the submitted information into the life cycle of a case. In addition, the external facing input page can be customised to match a court or agency's web site and comply with standards such as Digital Accessibility. As a completely web-based system hosted in the Microsoft Cloud, users can access Casedoc from any location, are not confined to working in the courtroom or office and can access Casedoc via a smartphone.



## The total service comprises multiple components, including

- Casedoc Court and Justice Management Cloud Software
- Customer Success Service including initial software configuration and ongoing service plans
- Cloud Hosting with private, public or on-premise deployment options

Together with Casedoc Court and Justice Management Cloud software, GoPro provides customers with a variety of support and customer success choices and cloud hosting options to effectuate transition and experience as smooth as possible.

GoPro is a Cloud Software provider who, if required by a buying department, may also deliver Cloud Support for 3<sup>rd</sup> party Cloud Hosting services introduced as a component of a Casedoc Cloud Software solution.

GoPro will deliver its Services either directly as Prime Contractor, or as a sub-contractor e.g. to a systems integrator, and/or with a buying department's chosen supplier(s) under a Collaboration Agreement.

GoPro will provide as much of the total solution under G-Cloud 14 as is practicable, permissible, and required by a buying department, leveraging the specialist expertise it brings to the table to facilitate a smooth, fast, effective and transparent transition to Casedoc Cloud solutions.





# Hosting

**Azure hosting options can be provided.**

## Supply of Azure Resources

Required Azure resources are available through our Microsoft Cloud Solution Provider agreement. Our simplified approach allows for the customer to roll up all the costs relating to hosting of the application into a single managed service contract.

## Design Services

The architectural design and choice of Azure resources to provide the hosting for an application is a complex process. These services are provided to simplify the process for our customers. Based on our experience we choose the most appropriate resources from the Azure catalogue and build an architecture that we know can support the hosting of the application to the required SLA.

## Cost Management

Part of the service we provide is to monitor and optimise the cost of the Azure resources that are used to provide hosting of the application. Either by scaling existing resources to an appropriate level for the application requirements, utilising features such as the reserved instances to reduce long term costs or by switching the type of resource used to provide the application hosting to be more cost effective.

## Build and Automation

We use a whole range of technologies to bring together the build, release and automation of the application hosting within Azure to provide integration and alignment with the software lifecycle used to develop the application. This close integration and automation means that as the application is developed and tested it is ensured to work as expected within the Azure hosting environment that has been designed for it.

## Service Monitoring

Using both inbuilt Microsoft technologies and third-party external monitors, we gain insight into the workings of the application and the hosting. Using this information with queries and notifications we maintain the expected availability and performance of the application.

## Service Maintenance

The ongoing maintenance of the hosting environment, including the patching of any IaaS components and analysis and response to any notifications raised by the monitoring systems.

Our business and technical processes are robust ensuring that maintenance is performed in a timely manner while minimising service impact. Routine maintenance is carried out such that the resilience in the hosting environment ensures that there is no impact to the service level.

## Experience

We have a broad range of experience in provision Azure IaaS Resources, & Azure PaaS Resources. Track record in provisioning and support Azure Architectures, including, Compute, Storage, Networking and Security.

Additionally, we have also provided consultancy and delivery of projects making use of the Power Platform including Power BI, and the associated Office product suite.





## Accessibility

Accessibility is a core principle which is considered throughout our software and solution delivery process. The UK's Public Sector Bodies Accessibility Regulations 2018 stipulates that all digital services should comply to WCAG 2.2 AA level, and all sites and services we develop are tested against these criteria. As well as providing for accessibility and inclusivity, designing, developing and testing websites against WCAG 2.2 AA also has significant benefits to the search engine performance, mobile-friendliness and overall usability of a website or service.

We use a combination of automated testing, manual testing and testing with assistive technology such as screen readers, to make sure our systems and websites comply with WCAG. We will also draft and publish accessibility statements. In line with UK Government advisory (and provisioned in a website's accessibility statement) we recommend periodic review of accessibility due to ongoing content changes. We are also able to provide 'experts by experience' testing by arrangement which involves inviting users with a range of disabilities to test the website and feedback on improvements.





# Using the Service - Onboarding

## Ordering and Invoicing

Requests for more information or to place an order for our our Casedoc Court and Justice Case Management service, contact PDMS on [sales@pdms.com](mailto:sales@pdms.com).

We would propose arranging a meeting to find out more about your precise requirements and answer any specific questions you may have. If required, we are also happy to provide an additional detailed proposal which will cover the specific deliverables, approach, timelines etc.

Should we then progress to the order stage, the GCloud call off contract would be signed by both parties. Depending on the solution or service we are delivering, we will also provide a Statement of Work(s) which clearly defines the project deliverables and ensures that we are both fully aligned in terms of the approach and the outcomes.

The minimum contract period is typically 1 year and commences following UAT handover, subject to contract agreements.

Once we have a more detailed understanding of your specific requirements, we can provide a detailed cost breakdown which is usually on a Time and Materials basis. We can also provide Fixed Price quotes depending on the project deliverables.

- Time & Materials services will be invoiced monthly in arrears.
- Fixed Price projects payment milestones will be discussed and agreed as part of our onboarding process.
- Recurring fees will be invoiced annually in advance.

Use of the service is subject to the PDMS Terms & Conditions and any terms outlined in the Call Off Contract.

## Pricing Overview

You can find pricing information in the the Casedoc Court and Justice Case Management Service Pricing Document and the PDMS Rate Card.



## Offboarding

We will agree an offboarding process which will include details of the data that will be provided, the format, any relevant documentation and details of how knowledge and learning can be handed back over to the organisations. Depending on the specific tasks related to offboarding at the end of a contract, there may be additional costs.



## Termination Process

Our terms and conditions are tailored to meet the nature of the specific solution, project or service we are delivering to ensure that it best meets our client's objectives. The specific terms relating to contract termination would be agreed as part of the contract award and onboarding process and form part of our final contract.

Our standard termination clause, without cause requires 3 months' notice of termination.

## Training

We provide training for our services and solutions in a variety of different ways. We will outline and provide costs for an agreed training plan and knowledge transfer as part of our onboarding process.

We offer several different training approaches including:

- Workshops and training sessions – in person or online
- User guides – including online wikis
- Online video tutorials and how to guides – for self-paced training or as refresher materials

We can also provide in-depth training to “Super-Users” of the solution to support a “train the trainer” approach.



# Implementation Plan

Once you have decided to purchase ACM a number of steps, outlined below, will be required to set up your dedicated ACM implementation.



## Discovery

Early engagement to ensure alignment of the implementation with the customers business and IT goals.

## Business analysis

Defining or clarifying requirements and expressing these in user stories and by example acceptance criteria.

## Project management

Project Management via a hybrid PRINCE2 and agile delivery methodology, with project tasks planned and designed in detail where appropriate, and iterations to define and design full requirements using agile methodologies.

## Configuration

Customer success team works closely with the customer to configure user stories, ensuring that the customers is skilled up to gradually take over the configuration of the system.

## Data migration

Our data migration experts will facilitate the process of data mapping and migration using standard migration tools.

## On-going support

With our cloud service we provide a full end-to-end support model and also offer a range of enhanced support models if required.

## Customisation

If there are any areas that you have specific requirements for, that require either new functionality or changes to existing functionality, we can customise ACM to meet your needs. We can develop interfaces for any integrations that you require so that ACM can work with your associated business systems.

We will hold a number of briefing calls as part of our onboarding process where we will ensure that we have a shared understanding of the project outcomes, the broader project context and to establish agreed ways of working.

As part of our onboarding process, we will provide an implementation plan that will cover the following:

- Project Overview covering objectives and scope
- Project Roles & Responsibilities for stakeholders and key team members
- Project Delivery methodology e.g. Agile, Waterfall
- High level Project Timeline with major milestones etc.
- Risk Management to identify and mitigate any potential risks
- Change Management procedures
- Communication Plan, including channels, frequency and format
- High Level Technical approach
- Hosting (if applicable)
- Documentation and knowledge transfer
- Go-live
- Post go-live processes such as support and system enhancements



## Data Security

We are certified to ISO/IEC 27001, the internationally recognised standard for Information Security Management and are certified under the Cyber Essentials Plus scheme.

In the Isle of Man, the Data Protection Act 2018 makes provisions for the regulation of the processing of information relating to individuals.

The Data Protection (Implementation of GDPR) Order 2018 gives effect in the Island to EU Directive 2016/79 of the European Parliament (General Data Protection Regulation).



## Data Back Up & Restoration

We understand the requirements and the comfort that is brought about by backing data up. We have exceedingly high levels of uptime, resilience and redundancy although there are still occasions where data will need to be restored to a previous date.

We have therefore built a backup system which provides continuous recovery points for the data underlying the systems that we have developed. These backups are written to online storage for quick recovery and also regularly taken to tape so as to provide a point in time archive.

The underlying database engine allows point in time recovery, giving an RPO of near zero in the case of data corruption. In the unlikely event of a total system failure our combination of backup strategies (including transactional data backups every 4 hours) supports an RPO maximum of 4 hours.

We perform periodic testing of the backup archives to ensure integrity of the data and restore capabilities.





## Business Continuity

We have a robust set of policies and procedures, which form part of an overall Business Continuity and Disaster Recovery Framework to ensure that we are able to provide services to our customers during, and after, significant events that can occur from time-to-time. These policies and procedures form part of our ISO 27001 and ISO 9001 certified management systems, and as such are externally audited to validate their appropriateness and effectiveness.

Our general approach to business continuity is to ensure that there are no single points of failure within any part of the business.

This ethos means that we make use of multiple, geographical diverse, tier 3+ datacentres to house all of our business-critical data processing units. Our systems are setup in such a way that should a single datacentre fail then customers and our staff should see no loss of service. Should an incident occur then the system will automatically fail over to the other data centre for the provision of services.

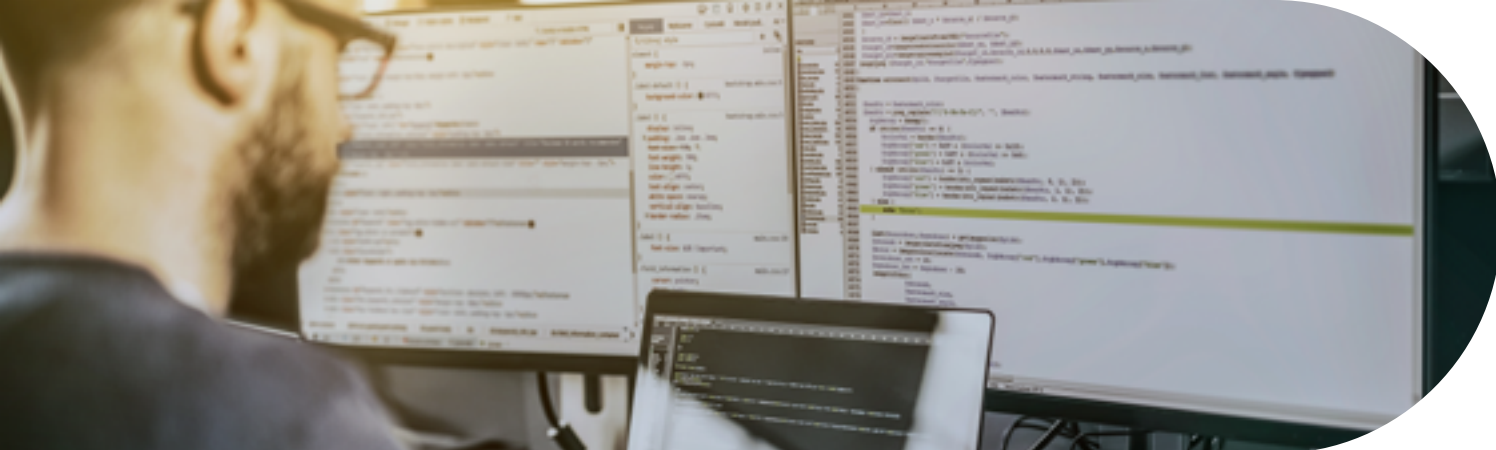
We can provide copies of the various policies and procedures that relate to Business Continuity on request.

## Data Protection

We have a dedicated, qualified Data Protection Officer who is responsible for overseeing data protection across the organisation. We have a Data Protection Policy that details how we and our staff will conform to the requirements of the applicable Data Protection Legislation. The Data Protection Officer provides support and advice to each department and ensures ongoing compliance with the legislative requirements through auditing each department. These audits cover all aspects of data protection from collection through to disposal, ensuring that we correctly follow the identified requirements.

We will also, in conjunction with our customers as the Data Controller, provide assistance for any required Data Protection Impact Assessments as part of our services and solutions, which may identify any controls needed that are over and above the standard provision.





## Support

We have a dedicated support team providing support for the solutions we have developed. We will agree a support service that meets your specific needs as part of our implementation plan and we provide a support and management contract which outlines our support commitments.

Support is typically available during office hours but can be extended to provide 24/7 coverage if required.

We have a number of channels for reporting support cases including an online system to record, manage and monitor the progress of individual support cases.

We will work with you to identify suitable KPIs for ongoing monitoring to demonstrate adherence to agreed service levels. These will be included within regular project service reports. An example of a typical response time KPI is as follows:

|                                          |                                                                                        |      |
|------------------------------------------|----------------------------------------------------------------------------------------|------|
| Target achievement of SLA response times | <b>P1 (High):</b> Response within 1 working hour; resolution within 4 working hours.   | >95% |
|                                          | <b>P2 (Medium):</b> Response within 4 working hours; resolution within 2 working days. |      |
|                                          | <b>P3 (Low):</b> Response within 2 working days; resolution within 5 working days.     |      |

## Service Management

### Ongoing Service Experience

Customers may choose between two different service plans, Standard and Premium, based on their needs.

The standard plan includes 09:00 - 17:00 support hours as well as quarterly check-ins to understand the customer experience, service level and other system health and analytics services.

### Account Management

We assign a dedicated Account Manager to all our customers. Our Account Managers, together with our Project Managers are a main point of contact for our customers. They are responsible for contract management and any account queries that you may have over the course of the contract. They will proactively support you to ensure that our services and solutions are delivering the best possible outcomes for your organisation.



## About PDMS

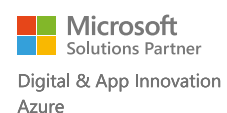
PDMS is a technology company specialising in software development and digital services. With a unique blend of software engineering excellence and creative digital design, we prioritise user-centric solutions. From analysis to ongoing support, we guide clients through every stage of their digital journey.

Our team consists entirely of full-time employees who are committed to continuous learning and skills development. Each member undergoes BPSS checks, with the majority holding SC security level clearance. Our diverse team brings expertise in project management, business analysis, UX design, software development, testing and infrastructure support.

We prioritise customer success, fostering long-term relationships - working with over half of our clients for a decade or more.

With three decades of industry experience, we've honed our understanding of the unique challenges, pressures, and opportunities encountered by the public sector in harnessing technology for maximum impact. Passionate about leveraging technology for tangible outcomes, our digital projects have saved millions, benefiting both public and private sectors while reducing environmental impact and enhancing productivity and customer service.

## Accreditations



## Memberships





## Social Value

Right from the outset, giving back to our local communities has always been important to PDMS. We do this in many ways including fundraising activities undertaken by our generous and enthusiastic staff, corporate charitable donations to local, national and international causes and providing services in kind - for example, a new website for a sporting club or a database for a wildlife charity.

However, what we are most proud of is the time that our team generously gives up to support many community charities and organisations - particularly those that focus on young people. We provide mentors to schools and students, support the work of Junior Achievement and help to broaden the horizons of young people, especially young girls, when it comes to career opportunities in tech. We've welcomed hundreds of students on work experience, placements and apprenticeships over the years and have loved helping young people to learn more about the world of work and grow in confidence.

We want to play our part in protecting our environment too. Our ISO14001 accreditation, is helping us to measure and minimise our impact.

PDMS has committed to achieving Net Zero and has pledged not only to take action to measure, reduce and offset its carbon footprint but to also champion environmental protection within all spheres of influence including biodiversity.

When awarded contracts to undertake work as part of the GCloud framework, we will discuss with the buyer appropriate levels of social value that we could offer that are aligned with the buyer's social value objectives, we also liaise with the relevant buyer project team to see how we can develop and maintain skills as part of any contract. We will look to support the buyer's own social value framework by offering work careers support, mentoring and supporting charities that help women and young girls to progress a career in tech, STEM ambassadors etc.

We regularly take on apprentices across different technical roles and 17% of our current development team started as apprentices.

We will pro-actively seek to openly share our knowledge/ expertise by providing online 'lunch and learn' training sessions on accessibility, agile delivery and UX design. Examples include work experience placements, careers talks & mentoring, diversity & inclusion initiatives and supporting the development of digital skills.



We will provide regular updates on how we are performing in relation to our social value commitments as part of our regular Account Management meetings and will provide an annual report detailing the activities undertaken which have been attributed to a buyer's specific contract and the impact delivered.



## Our Clients





## Contact Details

 [pdms.com](https://pdms.com)  
 [twitter.com/pdms](https://twitter.com/pdms)  
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