



Case Management

Advanced Workflow & Case Management GC15

Table of Contents

Introduction.....	2
Company.....	2
Our values.....	2
The service.....	3
Our cloud services	5
Pricing & commercials.....	7

Introduction

This document summarises the Service Definition submitted by Civic Computing Limited for its 'Advanced Case Management Cloud Software for the Public Sector, herein referred to as ACM.

This Service is suitable for customers who require Civic to deliver its ACM Cloud Software for processing and storing UK Government OFFICIAL and OFFICIAL-Sensitive data.

ACM Cloud Software is supplied as a G-Cloud 15 Lot 2 (Cloud Software) service.

Where required, cloud hosting and professional services are available via separate Civic G-Cloud 15 listings or through customer-selected providers.

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Company

Civic is a premier full-service digital agency and a distinguished partner of GoPro, specialising in Case Management solutions. Having managed over 2,000 projects across the UK and Europe, our commitment is to enable the public sector to leverage digital opportunities, enhancing operational efficiency and improving service delivery.

Our mission is to empower public organisations to optimize their workforce and effectively serve their communities. At Civic, we are guided by values of honesty, integrity, and quality, which define our customer relationships.

We are dedicated to creating measurable positive social impacts, with a focus on combating climate change, fostering equal opportunities, and prioritising staff wellbeing.

Civic proudly holds ISO 27001 certification, affirming our continuous commitment to the highest information security standards. This includes the implementation, maintenance, and ongoing enhancement of our information systems. Furthermore, our ISO 9001 certification reflects our



unwavering dedication to operational excellence.

Civic operates UK-sovereign cloud hosting services aligned with G-Cloud 15 Lot 1 requirements, including compliance with the NCSC Cloud Security Principles. Where customers require hosting for ACM Cloud Software, this is available via separate Civic G-Cloud listings or through customer-selected hosting providers.

Our values

Straight-talking and approachable

We're respected for telling it as it is. We're friendly, engaging, and welcoming, and pride ourselves in building genuine, honest, and lasting relationships with clients.

Expert and flexible

We're skilled at applying the technology and know-how that can transform user experience and deliver excellent service by listening to the needs of our clients.

Innovative and curious

We believe in innovation and are always open to new ideas. We have a passion for building great user experiences that help businesses prosper and make a difference to society.

Trusted and collaborative

We're respected for the quality of our work and the integrity of our relationships. We strive to be open, honest, and professional with everyone.

Respectful and supportive

We encourage personal development, value job satisfaction, and engage staff in major decisions. We support the environment, respect diversity, and strive to make a positive social impact.

The service

The ACM Cloud Software has been assessed in public-sector environments where UK Government OFFICIAL and OFFICIAL-Sensitive data is applicable. These assessments have confirmed that the platform is technically advanced, supportable, and upgradeable, with functionality that is fit for purpose and commercially viable within the wider case management market.

Key features

ACM offers robust end-to-end case management, distinguished by its exceptional focus on usability. The system is designed to be intuitive and user-friendly, enabling both new and occasional users to quickly become proficient and start working immediately with minimal training. ACM stands out for its high degree of configuration flexibility and provides a comprehensive, ready-to-use solution.

Easy Case Registration with Pre-Defined Templates

ACM allows for the pre-definition of specific properties such as metadata, workflow, deadlines, responsibilities, and access controls for each case type. These case types serve as templates from which new cases are created, streamlining the registration process for new cases and ensuring consistent, compliant processing.

Tasks and Workflows

ACM enables predefined workflows and tasks within cases, which users can efficiently manage via an intuitive Kanban board. Cases are segmented into phases, each equipped with its own predefined

tasks, deadlines, and responsibilities, facilitating organised and timely case progression.

Ad-hoc Process Management

ACM supports consistent and compliant case processing through guided workflows. For cases with variable or exploratory elements that challenge predefined processes, ACM accommodates by allowing the definition of dynamic ad-hoc processes and tasks. This flexibility ensures that even the most complex cases are handled efficiently and effectively.

Document, Content, and Email Management

The system provides integrated management of documents, content, and emails. Users can easily create or attach documents and content to a case, which are automatically categorised, tagged, and organised into folders. A document preview feature allows users to quickly view the contents of attached documents without needing to open each one individually. Additionally, the ACM Sidebar client enhances email management within Microsoft Outlook, offering user-friendly features such as drag-and-drop importing of emails.

Forms, Emails, and Document Templates Management

Our integrated management system for forms, documents, and email templates enables the generation of these items from predefined templates, which auto-populate with case-specific and contact information, reducing time spent on document editing and preventing inconsistencies. Templates can be linked to specific case types, workflows, or contexts, ensuring their availability in the most relevant situations. Furthermore, forms serve as a versatile tool for data capture, with templates that can be easily created by non-technical users through a visual drag-and-drop editor.

Contact and Relationship Management

Our integrated contact management system efficiently stores information about individuals and organisations, linking them to cases in various roles. Contacts can be categorised by type, grouped, and connected to multiple cases and other contacts, enhancing the organisation and accessibility of contact data.

BI and Reporting

Our reporting system is backed by a dedicated, optimised reporting database, ensuring real-time reporting capabilities without compromising the performance of the production system. This setup simplifies the process of defining reports, allowing for efficient data analysis and decision-making.

Rules Management

The optional Rules Management engine facilitates the externalisation of rules and regulations from processes and application logic. This design allows for centralised maintenance of these rules while they are concurrently utilised across multiple processes, enhancing both accessibility and consistency.

Process Automation

The optional BPM process automation module streamlines the automation of processes and tasks. With its graphical BPMN 2.0 compliant process designer, non-technical users can easily define and model processes. These processes can trigger various operations within ACM, such as automatically generating documents from templates, updating case statuses, or publishing documents externally via the Self-service portal, among others.

AI Scheduling and Resource Optimisation

Efficient use of caseworker resources is essential for maintaining productivity, especially when tasks cannot be automated. Our optional AI-assisted scheduling and resource optimisation capability supports the allocation of work by considering configurable parameters such as caseworker skill sets, certifications, availability, location, and other defined constraints. This supports more effective allocation of tasks and helps improve overall operational efficiency, with final decisions remaining under customer control.

Self-Service and Third-Party Stakeholder Collaboration

Our optional self-service and stakeholder collaboration portal offers a secure, configurable, and fully integrated environment for interaction with external users. Through this portal, external parties can register, initiate case processes, track their case status, and communicate with authorities regarding their cases. ACM securely facilitates the sharing of case information and documentation with external stakeholders, including subject matter experts, interested parties, and other authorities.

100% Service Enabled

The entire functionality of our solution is service enabled, meaning all system features can be accessed through standard REST or SOAP APIs. This integration capability allows seamless connectivity and interoperability with other systems and services, enhancing flexibility and ease of use across different platforms.

Configuring Line-of-Business (LoB) Applications

ACM empowers in-house teams to quickly and efficiently configure and deploy advanced line-of-business (LoB) solutions using agile methodologies, bypassing the extensive time, cost, and risk associated with developing from scratch. ACM has been successfully implemented across public- and private-sector organisations internationally, leveraging its extensive out-of-the-box functionality to support diverse LoB solutions.

Inspection Case Management & Optimisation

- Benefits Fraud Investigation & Prevention
- Corruption Investigation Case Management
- Fraud Investigation & Prevention
- Automated Public Payments Processing
- Automated Grant Disbursement
- Corporate Legal Case Management
- GDPR Requests Compliance
- Independent Police Complaints Investigations Management
- Ministerial Communications and Parliamentary Questions
- Correspondence Management
- Customer/Regulatory Complaints Management
- Dispute Resolution
- Freedom of Information Act Requests
- Registration, Inspection, Complaints, and Enforcement (RICE)
- Data Protection Act
- Licensing

- Business Onboarding and Self-Service Applications
- Grant Management
- Research Grant Management
- Contracts Management

Our cloud services

Civic offers professional consultancy and configuration services to ensure a smooth and successful onboarding experience for new customers transitioning to our G-Cloud software service.

Customer On boarding

Our customer on boarding process is grounded in agile principles and comprehensively covers all necessary service components, ensuring a successful digital service transformation.

Design

Our Solution and Technical Architects are dedicated to crafting the optimal solution and infrastructure design tailored to each client's needs. Whether providing a standard cloud service or a custom solution with specific customer requirements, our team ensures every design aspect is carefully considered and addressed.

Business Analysis

Leveraging our extensive experience in delivering case-based solutions, we support customers in defining and clarifying their requirements. This involves expressing needs through user stories and acceptance criteria, enabling clear and actionable project goals.

Project Management

Our project management approach incorporates the best practices of PRINCE2 and agile methodologies. A team of certified project managers guides the customer through the onboarding process, ensuring milestones are met efficiently and effectively.

Configuration

The customer success team collaborates closely with the client to configure the system according to defined user stories. This hands-on approach helps transfer knowledge to the customer's team, empowering them to manage and adapt the system's configuration over time.

Data Migration

Smooth transition to a new system relies on seamless access to both current and historical data. Our data migration experts oversee the data mapping and migration process, utilising standard tools to ensure data integrity and accessibility.

Ongoing Support

Support for ACM Cloud Software is available via separate Civic G-Cloud service listings. These services include defined support hours, service levels, and availability commitments, with enhanced support options available where required.

Engagement Models

Civic offers flexible engagement approaches through separate G-Cloud service listings, enabling customers to structure delivery and integration arrangements that align with their wider supplier landscape. Customers can engage with us as a Prime Contractor for an end-to-end service or under a Collaboration Agreement with preferred systems integrators and hosting providers.

Off-boarding Services

Civic supports customers during the off-boarding process, whether through standard data extraction services or by assisting with data migration to another platform. Extracted data can be delivered as a SQL database containing all system data and file attachments, or in XML format with files included. Off-boarding services are provided on a time-and-materials basis, with transparent cost estimates provided upfront.

By adopting these comprehensive services, Civic ensures that every phase of the customer journey, from onboarding to off-boarding, is supported with expert guidance and tailored solutions.

Pricing & commercials

This section summarises the basic pricing details and minimum contract periods. A complete pricing guide is provided in the separate pricing documents.

Pricing for ACM Cloud Software under this G-Cloud 15 Lot 2 listing relates to the software licence only. Cloud hosting and professional services, including configuration and support, are available separately via other Civic G-Cloud listings or customer-selected providers.

Unit price

Users are licensed in 'units of one' with a minimum number of 10 users.
For more details, please refer to the pricing document.

Minimum contract period

The minimum period over which a customer must have a contract with us for its cloud software is three months. Thereafter, the service may be terminated with three months written notice.

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