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LINKSPACE



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Contents

3	Introduction to LinkSpace
5	Overview of features
6	Features in detail
10	Case studies
13	Service details

Introduction to LinkSpace

LinkSpace is a secure, flexible and lightweight case management system. It's award-winning software – a highly trusted tool that can be configured to exactly your specifications. It is used by the Ministry of Defence, the Foreign, Commonwealth & Development Office, and the Ministry of Justice, including in His Majesty's Prison & Probation Service.

In addition to traditional case management, LinkSpace is used to guide teams through complex workflows, often where they need to stay within legal guidelines. It is also used by thousands of public sector staff every week, to ensure they comply with the relevant standards and policies.

LinkSpace has been designed with security from the ground up, and can be used concurrently by staff in a range of roles and departments, who only have access to view or edit the information they need to. It was originally created for situations where holding data in a spreadsheet wasn't robust and flexible enough. The Ministry of Defence, an early adopter, continues to use LinkSpace to hold information about their Defence Engagement activity around the world.

1.1 CASE MANAGEMENT FOR SENSITIVE DATA

LinkSpace is particularly useful for situations where different staff and teams need to work concurrently on cases that contain highly sensitive information. Extremely precise role-based access control ensures users can only see and work on the cases they need to. It also ensures they can only view, approve or comment on the exact data fields they need to, depending on their position, department and security clearance.

So, each staff member can be assigned a specific caseload, and they might have permission to see everything in each case, but only be able to edit or add input in to certain data fields. For example, an auditor might just have the access to write in one box, or an admin assistant might be able to view everything, but not be able to edit any fields, and so on. This way, staff can interact with the caseload just as they need to, and data is kept as secure as possible.

This role-based access can be controlled by designated admin users at a granular level, and dozens of permission groups can be set up. Individual access can be altered quickly as required, by those with the right authority. This precise access enables highly effective and secure collaboration – across teams, departments and even different agencies. It's one of the reasons our clients tell us our software is a game-changer for them.

There's also a full audit trail, so any changes made to data can be clearly seen by those with the right access. There is also a time machine function, showing how data looked at any particular previous moment. In fact, each change is recorded in the system automatically. This gives peace of mind and accountability when working collaboratively.

LinkSpace is particularly suited to defence, intelligence, and casework around health and crime, where collaboration is needed on potentially private and sensitive data.

1.2 GUIDANCE THROUGH BESPOKE WORKFLOWS

LinkSpace also comes into its own when guiding employees and teams through complex processes step by step, enabling them to do the right tasks at the right time, get the correct approvals, and bring in other colleagues where relevant. It can also provide decision support through the workflow process. User choices can determine the route through the workflow, where different options are presented depending on the answers given.

LinkSpace is used daily by staff at the Ministry of Justice, who have to rigorously adhere to legislation in their casework. Because our platform is configurable for those with the right access, our clients can quickly adapt to changing circumstances. This ensures their workflow processes are always up to date, and they can feel reassured that there's a full audit trail too.

1.3 SECURITY IS AT THE HEART OF EVERYTHING WE DO

LinkSpace has been designed to be secure from the ground up. The software is regularly reviewed and penetration tested to ensure it meets the highest levels of data protection. It has been departmentally-accredited by both the MOD and MOJ for storing and sharing OFFICIAL SENSITIVE information. With its excellent security posture, LinkSpace is the perfect tool to ensure that your organisation maintains compliance with GDPR. Our standard hosting is in our own private UK cloud, designed for processing government data. Deployment of LinkSpace is very flexible so we are able to accommodate most other hosting options.

In addition to the security of LinkSpace, our company Ctrl O has information security as the bedrock of its business – it's at the heart of everything we do. Ctrl O is certified to Cyber Essentials Plus, as well as being ISO 27001:2022 certified by a UKAS-accredited certification body. We conduct regular audits throughout the year ensuring continuous improvement.

All Ctrl O staff (and any contractors) with access to the data, are security cleared in accordance with our security policy, and in practice SC for most staff. Please request our separate publication "How LinkSpace meets the UK Government Cloud Security Principles" if you'd like more information on this.

1.4 HANDS-ON SERVICE AND NO LOCK-IN

At Ctrl O, we pride ourselves on a personal service. Our clients know that they can ring us up any time, for any tech support needed, and to discuss any configuration changes to ensure their system is as intuitive as possible. Our software is open source, and departments are able to easily get their data in and out of our systems as required.

Overview of features

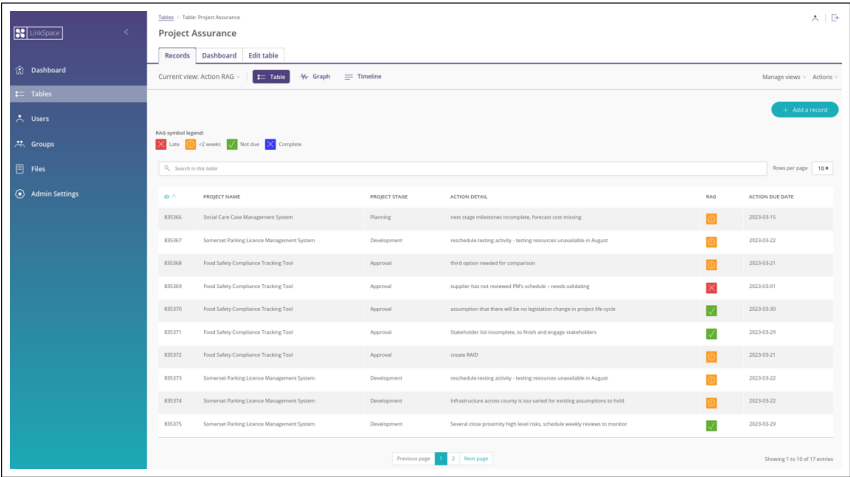
LinkSpace is designed to be a powerful case management system that's straightforward and intuitive to use. Here's an overview of the software's main features:

- ▶ LinkSpace can truly meet your bespoke requirements – our technical team work closely with new clients to configure the exact workflow they need for their complete process, from beginning to end. We also keep working with them to make sure the system stays that way. Configuration tweaks happen fast – in hours and days, rather than weeks or months
- ▶ Our software guides different staff through each of the steps that are required, in a straightforward way
- ▶ Staff are alerted by email when an action from them is required
- ▶ The precise role-based access enables different teams, departments and even organisations to work in parallel on the same caseload, working with just the data they need to
- ▶ Decision support can be built into the system, and ensures that all the possible user choices on offer comply with policy guidelines
- ▶ There's a full audit trail of all changes, recording the user who made them, and the time and date. There is also a time machine function, showing how data looked at any particular previous moment
- ▶ Personalised views and reports of the data can be made swiftly, to enable efficient and streamlined working
- ▶ Validation of data entry ensures uniformity for reliable statistical analysis
- ▶ Dashboards show the data in a variety of ways, just as needed
- ▶ Where relevant, we can also teach those with the right clearance to be able to configure the software themselves (in a way that ensures important processes aren't changed)

Features in detail

3.1 CREATING AND EDITING CASES

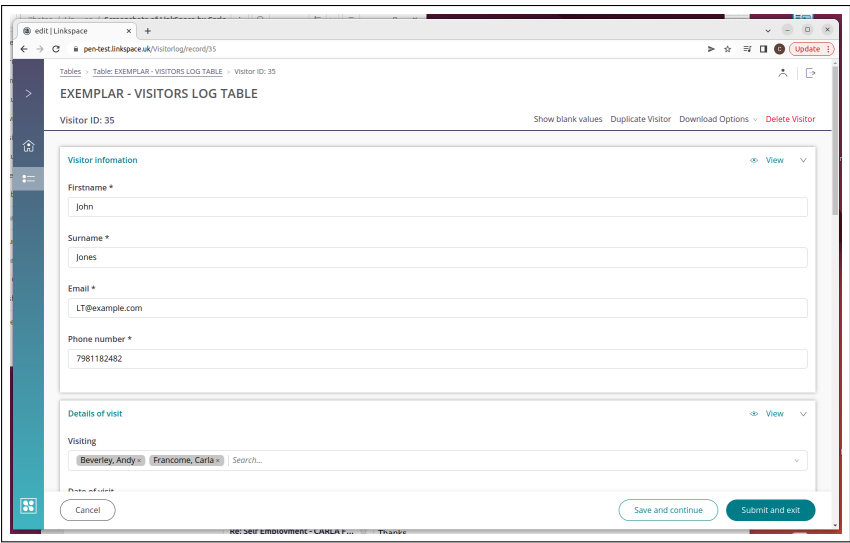
In its simplest form, cases in LinkSpace are displayed in a summary rather like a table. A number of different views of a caseload can be created – either to help efficiency when working, or to give people access to just certain cases. Some people say the summary looks a little like a spreadsheet on first glance, and LinkSpace is often used where one might use a spreadsheet. Indeed, we find that many of our users have previously been tracking their casework in multiple different spreadsheets, before turning to our software instead.



PROJECT NAME	PROJECT STAGE	ACTION DETAIL	RAG	ACTION DUE DATE
830365 Social Care Case Management System	Planning	next stage milestones incomplete, forecast cost missing	Orange	2023-05-15
830367 Somerset Parking Licence Management System	Development	reschedule testing activity - testing resources unavailable in August	Orange	2023-09-22
830368 Food Safety Compliance Tracking Tool	Approval	third option needed for comparison	Orange	2023-03-21
830369 Food Safety Compliance Tracking Tool	Approval	supplier has not reviewed PM's schedule - needs updating	Red	2023-03-07
830370 Food Safety Compliance Tracking Tool	Approval	assumption that there will be no legislation change in project life cycle	Green	2023-03-30
830371 Food Safety Compliance Tracking Tool	Approval	Stakeholder list incomplete, to finish and engage stakeholders	Green	2023-03-29
830372 Food Safety Compliance Tracking Tool	Approval	create RAG	Orange	2023-03-21
830373 Somerset Parking Licence Management System	Development	reschedule testing activity - testing resources unavailable in August	Orange	2023-09-22
830374 Somerset Parking Licence Management System	Development	Infrastructure across county is too varied for existing assumptions to hold	Orange	2023-09-22
830375 Somerset Parking Licence Management System	Development	Several close proximity high level risks, schedule weekly reviews to monitor	Green	2023-03-29

Figure 1: A summary of cases in LinkSpace

Each row in the summary represents a case. When a row is selected, it opens the case workflow, which is where it can be viewed and edited. This data flow is completely configurable, and is customised for the information that you need to gather and work on. The workflow can be populated with text boxes, calendars, drop-down menus, multiple choice options and more. Here's an example of the start of a workflow.



EXEMPLAR - VISITORS LOG TABLE

Visitor ID: 35

Visitor information

Firstname *
John

Surname *
Jones

Email *
LT@example.com

Phone number *
7981182482

Details of visit

Visiting
Beverley, Andy ▾ | Francome, Carla ▾ | Search...

Save and continue | Submit and exit

Figure 2: The start of a bespoke workflow in LinkSpace

The workflow can be configured to the exact processes that are needed. Below you can see an example of a calendar, and a calculation of time. Other examples of features include that information can be added with

an “i” button above the data field – and can provide advice and direction about what needs to be filled in. In this workflow, staff can be emailed directly when tasks are assigned to them, and individuals may have access to only view or edit certain data fields. Some of our workflows have around 300 data fields in them – the process can get very involved. User choices can determine the route through the workflow, where different options are presented depending on the answers given. The process also provides a transparency of working.

A screenshot of a web form interface. On the left is a dark teal sidebar with a home icon and a menu icon. The main content area is white. At the top, there's a calendar for June 2024 with the 5th highlighted. Below the calendar is a date input field containing '05-06-2024'. To the right of the calendar is a dropdown menu with 'arch...' visible. Below the date field are two time input fields: 'Time of arrival *' with '11:43' and 'Time of Depature *' with '12:40'. At the bottom, a grey box displays 'Total time (calculated)' as '0 hours, 57 minutes'. A 'View' button with an eye icon is in the top right corner.

Figure 3: Other examples of possible field types

3.2 VIEWS OF A CASELOAD

Going back to the caseload shown earlier – personalised views and reports of the data can be made rapidly by those with the right authorisation. Views can be created for staff of just the cases they need to see and work on. These views are very robust – individuals will only be able to see the cases that they have been given access to, or that they have the right clearance for. These views can be controlled by those with the right admin rights, on a granular level.

In addition, individuals can create their own views of cases, for efficiency of working and to streamline their tasks.

Here are some examples of views for a national caseload that includes sensitive information:

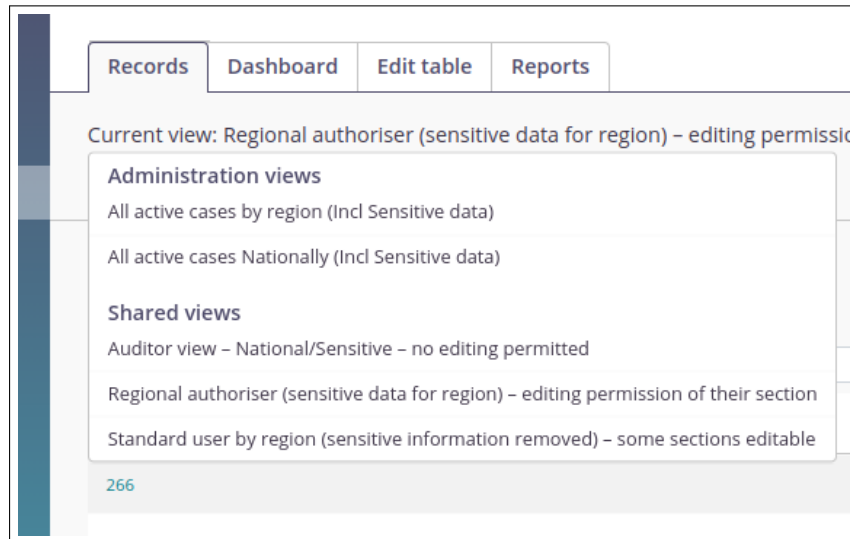


Figure 4: Examples of different views of cases

We often say a LinkSpace caseload is like a house being built – where electricians, plumbers, and builders each focus on their own trade, working together to finish the house. In LinkSpace, different staff might see and work on completely different cases and data, depending on what they need access to.

3.3 CREATING DASHBOARDS

Personal and shared dashboards can also be created, using a range of widgets. They can show particular work tasks that are a priority, and illustrate data with graphs, maps and so on.

Text widgets can also be configured to provide messages to the user community, and links to reference data or training materials can also feature.

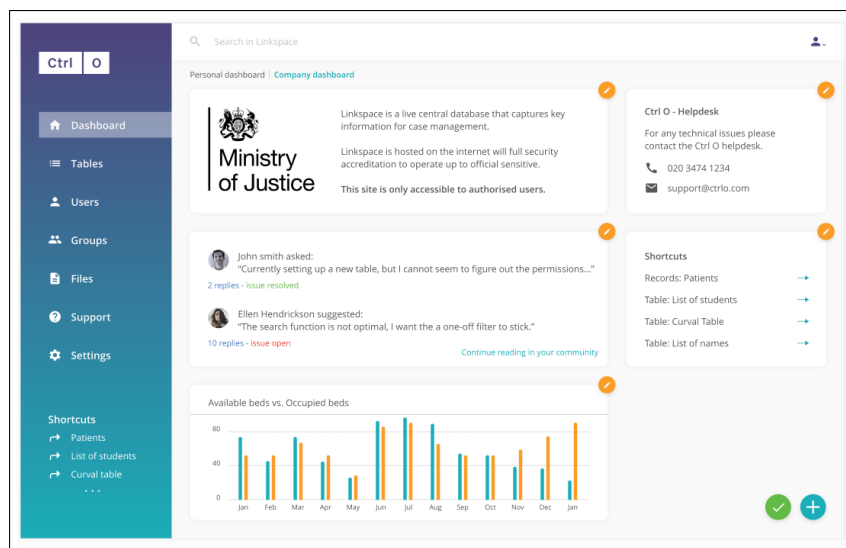


Figure 5: Example of a LinkSpace dashboard

Data visualisation provides a powerful capability, with many graph types and data grouping options possible, to show relevant information drawn from large datasets. We hear a lot that because data is recorded in a uniform way in LinkSpace, a lot of powerful analysis is then possible.



Figure 6: Graphs can be added as widgets on the dashboard

Data can also be viewed in a calendar format and a timeline. The information shown can be tailored to what's of interest to an individual or groups of users.

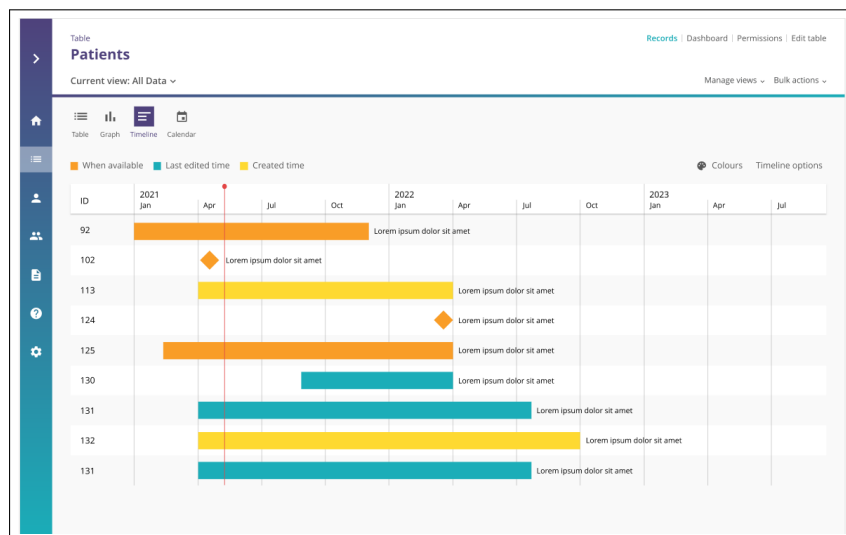


Figure 7: Example of dates displayed on a timeline

Each of these options, and more, can be selected into personal or shared dashboards using a range of widgets.

Case studies

LinkSpace has a wide variety of potential uses, owing to the flexibility and versatility of the platform. To illustrate this, three case studies are included below, and further examples can be found [on our website](#).

4.1 MINISTRY OF DEFENCE (MOD) – MANAGING INTERNATIONAL DEFENCE ENGAGEMENT ACTIVITIES

LinkSpace is used to obtain permission for and keep track of all Defence Engagement Events around the world. A bespoke workflow has been created to apply for permissions and funding. Defence Engagement Activities are non-operational events – they don't involve combat – such as training, diplomacy and military exercises. In order to secure funding and permission, personnel in the MOD and the Foreign, Commonwealth and Development Office must go through a rigorous approval process. A bespoke workflow has been created, and approvals are granted in the system by those with the right rank and authority.

Applications need to meet strict criteria to be successful, such as being compliant with risk policies, overarching strategy, and financial rules. Staff are guided to fill in up to 300 data fields so their application can be assessed, and there's a full audit trail of the process.

The Challenge In 2014, The MOD was looking for an alternative to spreadsheets to manage applications for Defence Engagement Events around the world. They wanted staff to be guided through a specific workflow, managers to be alerted to come into the system by email, and to have a full audit trail. They also wanted a system that recorded who made changes when, had configurable role-based access that they could set, and where no information could ever be deleted and lost for good.

The Solution The MOD decided our software LinkSpace would fulfil their requirements. They first deployed it a decade ago and it's still used today.

Our team originally worked with MOD staff to create the exact workflow they needed, and the system has been tweaked whenever it's been required ever since. This has been done by our team at Ctrl O, or by MOD staff with the right authority, as it can be very configurable for those with the right access.

All data about International Defence Engagement Events over the last ten years is now stored in LinkSpace in a consistent way. It's available centrally, providing a clear picture for reporting and analysis.

The Implementation LinkSpace was implemented rapidly – the initial service was up and running within weeks, with the existing data on boarded at zero cost. The new system was rolled out incrementally, with spreadsheets being replaced one department at a time. The advantage of this was that the project team could continually adapt the system based on user feedback.

The Results When Linkspace was configured, it solved all of the problems identified by the project team, enabling staff all over the world to participate in the workflow in the way that they needed to.

Overall, procuring Linkspace resulted in a system that: was implemented four times faster than anticipated, reduced the original estimated procurement costs by 90%, and can be changed and reconfigured at zero cost in the future.

4.2 RIPA-COMPLIANT WORKFLOW AT THE MINISTRY OF JUSTICE

One of our LinkSpace systems is used to guide staff through specific workflows when they are applying to do surveillance in prisons, and looking to work with Covert Human Intelligence Sources (CHIS). These workflows ensure that staff have provided all the relevant information, when they are requesting authorisation for surveillance activities. It means that those looking to grant approvals know that they have done so in a way that's legally compliant, and have a full audit trail to show this.

The Challenge The Regulation of Investigatory Powers Act 2000 (RIPA), is UK legislation that regulates the use of surveillance and covert investigation techniques by public bodies. The legislation provides a legal framework for these activities – doing surveillance outside of this framework could be breaking the law. Staff at the MOJ knew that it was vital that those applying for approval to carry out such surveillance could ensure they were staying within the relevant legal guidelines.

In addition, the team needed to make sure that applications were only approved when managers could be sure that the request was legally compliant. The team previously used complex workflows on forms, often as paper documents. Managers would sign as appropriate. They wanted a tool where they could carry out all of this work in one place digitally, feel sure they were staying within the law, and have a full audit trail to prove it.

The Solution Our technical team worked closely with MOJ staff to ascertain the exact process they needed, and configured a bespoke workflow that was legally rigorous, and intuitive to use. The system was then brought in to support and then replace the well-established paper document-based process, with all data fields rationalised and transferred to web-browser forms. Wet signatures and emails were replaced by role based controls, dashboards and alerts so all activity was kept within the LinkSpace tool. In addition, managers could be emailed and notified to log on to the system, to assess a particular application. All approvals and feedback was given within LinkSpace, assuring transparency of the whole process.

The Results Staff can now apply for permission to do surveillance in a workflow that ensures their request, if approved, has been done so within legal guidelines, and that there's an audit trail to prove it. The system was configured within weeks, and deployed nationally in three months.

Staff tell us that now, “every step of the process is quicker, saving hours per application”.

4.3 CASE MANAGEMENT FOR COUNTER CORRUPTION

The MOJ use LinkSpace to track potential cases of corruption in prison officers. The system contains sensitive information that staff are given a range of access to by those with the right authority. Sensitive information is stored in one of our bespoke systems. It's a secure way of following cases through due process, including disciplinary or criminal proceedings. Robust role-based access means that many staff members can only see data for a particular prison, or only view or edit certain data fields.

In LinkSpace, provision of access to different data fields is very configurable for those with the right authority. It means that those in charge can grant very specific access to different individuals.

For example, an auditor could come and view a whole case, but might only have permission to edit in one box, whilst data analysts might be able to view dozens of cases, without seeing personal details like names or addresses. This enables staff in different teams and departments to be able to access and work with the relevant data in a way that reflects their job role and clearance.

The Challenge A team at the MOJ wanted to keep track of potential cases of corruption in prison officers, in a way that was very configurable in terms of who could see and edit what.

This was very sensitive information, so they wanted to be able to grant staff of different clearance and in different roles very specific access, and they wanted their own authorised managers to be in charge of that.

The Solution LinkSpace enables authorised staff to have very granular control over the role-based access. There are dozens of potential ways of viewing and editing the data, and it means that sensitive data can be protected, while a range of different staff work on a case.

The Results Our system enables staff in different roles and departments to be able to work on a caseload concurrently, in the way they need to, where they are only able to view or edit what they need to. Sensitive data is kept secure, and managers have peace of mind.

Service details

5.1 PRICING AND COMMERCIAL

Please refer to the separate pricing document for full details of costs and commercial details.

5.2 MOBILE DEVICES

LinkSpace supports smartphones and tablets with a fully dynamic, responsive design, enabling users to be practically engaged with their business processes from anywhere.

LinkSpace is very light, using minimal bandwidth for every page displayed. The screen size and format for mobile devices is different from desktops – but individual users or groups of users can create their own views showing just the data that is necessary and comfortable on their chosen device(s).

5.3 ACCESSIBILITY

Accessibility and working effectively with users of assistive technology is one of Ctrl O's core values. LinkSpace has been rigorously audited and tested to ensure it is compatible with modern web browsers, smartphones, tablets and screen readers. This has enabled LinkSpace to achieve the accessibility requirements of the central government ministries where it is deployed. One such Assistive Technology Testing Report performed by government staff as part of a live deployment concluded that the application was one of the best seen in that context. Our on-boarding procedures recommend the involvement of internal accessibility champions as part of the deployment and user testing team.

LinkSpace conforms to Web Content Accessibility Guidelines 2.2 Level AA.

5.4 INSTANCES

Each instance of LinkSpace is entirely self-contained, with its own set of users and configuration. One instance can be used for multiple projects, by creating multiple datasets within it. For very large datasets and large user communities, individual instances are recommended, we will advise on the appropriate configuration of the platform.

5.5 DEPLOYMENT

We aim to make the deployment and use of LinkSpace as quick and easy as possible. We recognise that different customers have different capabilities and expectations, and as such can provide a level of support appropriate to the circumstances, to make the deployment of LinkSpace as smooth as possible.

5.6 ONBOARDING, OFFBOARDING AND DATA EXTRACTION

Migration to and from the service is easy using our zero-cost onboarding and offboarding service. Data must be provided in a spreadsheet or CSV format; we will configure LinkSpace to fit the data as provided, and then load the data. If you need more advanced help, such as assistance in configuring LinkSpace for your particular needs, or if your data has poor integrity or is across many spreadsheets, then we can provide help via our separate Lot 3 Cloud Support service.

5.7 ADDING USERS

Users can be migrated into the system in bulk (or individually) during deployment and live running by the deployment or customer user administrator. There is also a self-service provision where accounts are requested by users from the LinkSpace login page, subject to approval and relevant permission application in accordance with customer management policy. Accounts can be added at any time, up to the number of licences purchased.

5.8 TRAINING

We believe that LinkSpace is intuitive to use and that no bespoke training is required for end-users. A full user-guide is available online or in PDF format. The application has context-sensitive help for each view and feature. As the system is configured, help screens and pop-ups may be configured to provide specific end-user guidance relevant to the use-case being deployed. Optionally, onsite classroom training for user-administrators, train-the-trainer and end-users is provided as a cloud support service (Lot 3) by Ctrl O.

5.9 DEPLOYMENT ASSISTANCE

If required, Ctrl O can provide personnel to assist with your deployment of LinkSpace. This can include the task of migrating data from disparate sources such as multiple spreadsheets or configuration of the product to meet your needs. A popular approach to on boarding LinkSpace is to take a user requirement (a business process) and work with Ctrl O staff as a cloud support service to train user-administrators and end users as we jointly configure and deploy the application. Full details of Planning, Setup and Migration, Training and Ongoing Support services provided by Ctrl O are provided in our cloud support service (Lot 3).

5.10 HOSTING AND NETWORKS

Ctrl O partners with ServerHouse as our subcontractor for the provision of our production infrastructure. This provides a highly-resilient dedicated hosting environment in a known physical location in Fareham, England. ServerHouse's data centre is Tier III with a dedicated onsite technical team providing 24/7 support and maintenance. The dedicated nature of the cloud hosting environment means that a system's neighbours are known, thus reducing the risk of vulnerabilities through attacks from unknown entities in the same hosting environment.

Custom hosting is also available in either public or private clouds. Costs for this is contained in the separate pricing document.

Services are monitored and maintained 24 hours a day by Ctrl O's subcontractor ServerHouse. A 24/7 help-desk is provided, which deals with incidents in accordance with the Service Levels. The help-desk can be contacted both by telephone and email.

5.11 SYSTEM RESILIENCE, BACKUPS AND DISASTER RECOVERY

LinkSpace is hosted in a highly-resilient Tier 3 hosting environment. The availability of LinkSpace is 99.95% per year. Full backups are taken every 24 hours and kept for a minimum of 3 months, with hourly incremental backups ensuring minimum disruption in case of any problems. Backups are stored with ServerHouse in a completely separate data centre, still located within the UK. Backups are encrypted in transit and at rest. In the event of any incident (or indeed at any other time) a data extraction can be provided from the backups, from any day over the past 3 months. In the event of a need to instigate disaster recovery procedures, backups can be used to rebuild the entire system at an alternative data centre.

5.12 SUPPORT BOUNDARIES

Ctrl O provides and supports all the server-side hardware and software that is used for LinkSpace in the Cloud. The Customer is responsible for providing and supporting the end user device and web browser through which LinkSpace is accessed. Likewise, Ctrl O is responsible for network connectivity from the servers to the WAN; the Customer is responsible for network connectivity from the WAN to the end user access device. For private cloud or custom hosting environments Ctrl O offers a support package as detailed in the pricing document. Without this package Ctrl O has no responsibility for supporting hardware or networks which are exclusively the responsibility of the customer and their sub-contractors and 3rd party suppliers.

5.13 SERVICE LEVELS

Ctrl O provides both an Availability and Response Time Service Level Agreement (SLA).

AVAILABILITY SLA The availability of the service is 99.95% per year.

RESPONSE TIME The response time depends on the priority of the incident, as follows:

- ▶ P1 and P2 (no alternative or no acceptable alternative): 1 hour.
- ▶ P3 (unusable non-critical function having operational impact, workaround available) 24 hours.
- ▶ P4 (function unusable, workaround available) 7 days.

Please note that availability excludes planned and emergency maintenance, and external connectivity or infrastructure outside of Ctrl O's control.

5.14 MAINTENANCE WINDOWS

To the extent reasonably practicable System Maintenance will take place either outside customer ordinary working hours or between the hours of 00:00 and 06:00 (UK local time) Monday to Friday or between the hours of Saturday 00:00 to 06:00 (UK local time) on Monday, (including bank holidays) unless there is an identified and demonstrable immediate risk to customer environment(s).

5.15 TECHNOLOGY CODE OF PRACTICE

LinkSpace, in concept, design and execution is built to support customers in complying with the Technology Code of Practice (incorporating the Digital Service Standard). The basic principle of being simple to adapt by staff within the user team when circumstances or understanding changes together with our commitment to open source, Open Standards and Open APIs provides the foundations for such compliance to be achieved.

5.16 GREEN ICT

Ctrl O hosts its services using ServerHouse's data centres, which have been certified Carbon Neutral. As such the Green Government ICT Strategy is supported in full.

5.17 API

LinkSpace can be accessed through a REST-based Application Programming Interface (API). This allows it to interoperate and share data with other software solutions and systems, and ensures that it is future-proofed for new requirements.

5.18 OPEN STANDARDS SUPPORTED

LinkSpace uses open standards for all interfaces: data can be exported using CSV format, the web-based interface is fully W3C compliant, and the API is built using OAuth2, JSON and HTTPS.

5.19 OPEN SOURCE SOFTWARE USED

LinkSpace is built entirely on open source software, ensuring that you are not tied into proprietary technology and can easily move to other solutions in the future.