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	HEADER		
	ICAEW Technical Accreditation Scheme "Secure Meeting" Software Evaluation		
			
	Date completed: 7th December 2023		
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	CONTENTS		
1	Introduction and Prologue		
2	Issues identified and evaluation conclusion -- GLOBAL REQUIREMENTS:		
3	Access and Security		
4	Data processing and reporting		
5	Usability		
6	Hosted and SaaS operation (if applicable) -- SPECIFIC REQUIREMENTS:		
7	Secure Meeting Software		

Ref		Vendor Comments	
1.	<u>INTRODUCTION AND PROLOGUE</u>		
Introduction			
1.01	The suitability of software for each particular user will always be dependent upon that user's individual requirements. These requirements should therefore always be fully considered before software is acquired. The quality of the software developers or suppliers should also be considered at the onset.		
1.02	<p>Fundamentally, good software should:</p> <ol style="list-style-type: none"> 1. Be capable of supporting the functions for which it was designed. 2. Provide facilities to ensure the completeness, accuracy, confidentiality and continued integrity of these functions. 3. Be effectively supported and maintained. <p>It is also desirable that good software should:</p> <ol style="list-style-type: none"> 5. Be easy to learn, understand and operate. 5. Make best practical use of available resources. 6. Accommodate limited changes to reflect specific user requirements. <p>It is essential, when software is implemented, for appropriate support and training to be available.</p>		
Approach to Evaluation			
1.03	The objective is to evaluate a product against a set of criteria developed by the ICAEW to ensure that the software meets the requirements of Good Accounting Software, as laid down in the summary.		
1.04	In order to effectively evaluate the software, a product specialist from the vendor completed the detailed questionnaire and provided it to the ICAEW to examine. The ICAEW's Scheme Technical Manager then reviewed the operation of the various aspects of the software assisted by a member of the vendor's technical staff and checked the answers to confirm their validity. The questions were individually reviewed and commented on and the majority of assessments were confirmed.		
1.05	The Technical Manager discussed the assessment with a member of the vendor's staff in order to clarify any points requiring further information. In the event of disagreement between the supplier and the Technical Manager, the Technical Manager's decision was taken as final and the response changed accordingly.		
1.06	The latest version of the software was used throughout the evaluation.		
1.07	When the evaluation had been completed, a draft copy was sent to the ICAEW Scheme Manager for review before completion of the final report.		
Prologue: Matters to consider before purchase			

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1.08	General Overview:	<p>MeaConnexus is a secure, tamper evident video meeting/interview solution. It is a platform agnostic, cloud based solution that allows users to create and hold secure meetings and interviews with anyone, and on any device. Most importantly, with digital tampering and disinformation being recognised as a global risk, MeaConnexus can be used to provide the trust and confidence that the content of your interviews and meetings can always be proven to be authentic.</p> <p>It has been designed to meet the requirements of any meeting/interview or investigation where a formal immutable record is required. Using blockchain technology, MeaConnexus can be used for business, criminal, private, legal, or financial meetings/interviews or investigations or inquiries where the discussions, actions, advice or other content can be challenged at a later date. And because MeaConnexus is a remote video interview platform it can help organisations meet sustainability targets through reducing unnecessary travel.</p>	
1.08a		<p>Benefits:</p> <ul style="list-style-type: none"> • Increased Productivity – Instantly create and share meeting/interview links to securely connect users. MeaConnexus enables users to initiate remote meetings/interviews using a cell phone or laptop with no download or special equipment required. It allows users, partners, participants, subject matter experts, and interpreters to attend from anywhere with internet connectivity. • Improved customer perception – Reduce response times and respond to customers faster with online face to face contact. • Reduce Backlogs and Manage Demand - Reducing travel time allows teams to conduct more remote meetings/interviews per day. • Meet Sustainability Targets - Reduce carbon output through reducing travel substantially and help to meet your organisational sustainability targets. • Reduce Frustration - Access, retrieve and manage interview data as an individual or in groups through a simple, easy to use interface. • Bookmarking and Annotation - Create key point bookmarks and provide the ability for users to annotate them to enable jumping straight to the most relevant information. • Automatic Transcription - Save hours of time by automatically creating time coded, named entry, speech to text transcription of the video meeting/interview – available immediately at the end (Supports 96 different languages). • Evidentially Secure – Assured to UK Official standards all data is transmitted and stored with the highest levels of encryption and is managed to NIST and CJIS* standards (*USA). • Silent Observers - Improve your interviews with Silent Observers. Invite individuals or teams to observe and contribute to the interview process without participants being aware. 	
1.08b		<p>Features:</p> <ul style="list-style-type: none"> • Rapid to implement and easy to use, MeaConnexus contains a plethora of features designed for formal interviews and meetings, key features include: • Software as a Service (SaaS): That offers our clients a choice of data residency so that their data can be stored within the region of their choice. • Tamper Evident Digital Evidence Bag: At the conclusion of each interview, a SHA-256 hash is created as a “digital fingerprint” of the packaged recording, which is then committed to the blockchain record. Subsequently, copies of the interview package can be revalidated against the immutable blockchain record. Even a one-pixel variation in the file will result in a validation failure indicating that the recording has been modified. • Digital Integrity and Authenticity: The SHA-256 hash of each recording is stored in the Hyper Ledger Fabric private blockchain. If subsequently required as evidence, interviewers, prosecuting authorities, defence teams can check the blockchain code to validate the file, providing assurance that the file has not been modified. • Easily Exportable: Interview recordings, transcripts, and any documents or other media shared during the interview can be easily exported in commonly used (non-proprietary) formats. • Secure: All data in transit and at rest is securely stored using AES256 bit encryption and TLS1.2 endpoint security. Data is stored in Microsoft Azure. • Privacy: Recordings are fully partitioned and inaccessible to unauthorised users. Specifically, recordings are not pooled into data sets that could be used to train AI models. • Customisable Branding – Organisations can apply their own branding and privacy statement to the solution. • Create Secure Groups – For sharing and collaboration of meeting/interview content. 	

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1.09	Supplier background:	<p>Issured are a UK company based in Milton Keynes and have been operating since 2014. The company was largely formed from former Policing, defence and public sector members of staff. Issured delivered the UK National Police Chiefs Council Digital Intelligence and Investigation Programme and recognised gaps within digital evidence collection and foresaw future challenges with evidence emerging from AI and Deepfake technologies.</p> <p>MeaConnexus is patented product that is fully owned by Issured and utilises its own continuing Research and Development programme of work. We have a development, test, pre-production, and live deployment process and we are continually maintaining the products that we develop and looking for features that can add benefit to users.</p> <p>We currently have a pipeline of enhancements and live upgrades for existing clients, and we work with our clients to understand future needs and either factor these into our development lifecycle or build a bespoke features to meet client needs. All change is managed through our change control process.</p>	
1.10	Product background and suitability for the user:	<p>The Solution is easy to use and does not require interviewees to download any software. The solution allows users to access it through any web based browser, including mobile phones and tablets. The sessions within Connexus are mandatory recorded and at the conclusion of each interview, a SHA-256 hash is created as a “digital fingerprint” of the packaged recording, which is then committed to the blockchain record. The session can then be confirmed through an external blockchain validator. An organisational key to Connexus is provided, so admin users have to be appointed to help manage team privileges, as well as review any historic recorded content, download these from the system, in addition to chat logs and a transcript of the session.</p>	
1.11	Add-on modules:	<p>Mea Fuse is the sister product to Connexus and is a secure file repository with the records recorded onto the Blockchain. The Issured team have also been developing a secure mobile messaging application, to sit inside the Mea portfolio of solutions.</p>	
1.12	Typical implementation [size]:	<p>Mea Connexus has been designed to work with organisations and teams of any size. Training of administration users is provided and these super users can then assist the implementation of the team. As the solution is agentless, it requires no downloads or integration issues with systems.</p>	
1.13	Vertical applications:	<p>Mea Connexus has been designed with horizontal application, able to be used in any environment with connectivity and a web browser, for a number of different processes.</p>	
1.14	Server platform and database:	<p>Mea Connexus uses Microsoft Azure Public Cloud Services. The client is not required to have additional servers or databases</p>	
1.15	Client specification required:	<p>Clients can build their own organisation and team profiles, allocate permissions, add their company logo and edit the privacy policy to their organisations. All these functions are intuitive and can be completed through the settings environment</p>	
1.16	Partner network:	N/A	

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2.	ISSUES AND CONCLUSION		
Highlighted issues			
2.01	There are a number of limitations in the product, which while not adversely impacting upon this evaluation may be of importance to some organisations. It is important that any business contemplating the purchase of software reviews the functionality described and limitations therein against its detailed requirements. Attention is drawn in particular to the following areas where the product, on its own, may not be suitable for businesses with certain requirements:		
2.02	"Findings for considerations by potential customers: (See vendor comments against the various Questions)"		
	* The system does not currently integrate with Microsoft's Active Directory for single sign-on; but OKTA SSO is being developed. in the absence of SSO there is a question as to what security protocols are in place with respect to employees leaving Issured's customers? Issured have clarified that "We are looking to implement SSO using open standards towards the end of this year. In the meantime, if a user leaves the organisation, local admins can lock the leaver's Mea:Connexus account and transfer their meetings to another member of the team."		3.08
	* It is not possible for a user to undertake their own "point in time" backups but this is done as part of the Azure platform and enables the database to be rolled back to any point in the previous 7 days.		3.27-3.28 6.48, 6.50
	* The system does not have an in-built report-writer, but does have a basic inbuilt reporting function.		4.30-4.35 6.80-6.92
	* Reports cannot be added to user menus as user-defined reports cannot be created and saved.		4.37
	* The system does not support the production of scheduled batch reports.		4.38
	* With regards to usability: The system does not support user-defined fields, provide reminders, or have a universal search.		5.10 5.11 5.15
	It is not possible to store preferences and default values on a per-user basis.		5.16
	* There is no context-sensitive help, but a full manual for the service is downloadable (in PDF format). This cannot be updated by the user.		5.21 5.22
	* ESCROW is not offered for the software, but this is not unusual for a SaaS service.		5.23
	* No service credits for failure to meet SLA, but this could be discussed on a per-client basis.		5.33
Evaluation conclusion			
2.03	For the specific use-cases in support of providing secure meeting facilities, for which the product is designed, it is a solid and capable solution. It continues to be actively developed and enhanced. Members should be aware of the limitation of the solution as above, and fully understand the role that it can play in an engagement.		
Disclaimers			
2.04	Any organisation considering the purchase of this software should consider their requirements in the light of proposals from the software supplier or its dealers and potential suppliers of other similarly specified products. Whilst the contents of this document are presented in good faith, neither ICAEW, nor the ICAEW's Technical Manager (RSM UK Consulting LLP or any party nominated by the ICAEW to perform this role on the ICAEW's behalf) will accept liability for actions taken as a result of comments made herein. The decision to purchase software resides entirely with the organisation.		

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3.	<u>ACCESS AND SECURITY</u>		
Access control			
3.01	What security features are included to control access to the application?	Multifactor Authentication is included via token or SMS	Confirmed
3.02	Can access to functions be managed via a permissions matrix so users can only see (in menus and other links) and access those areas they are authorised to access?	Group Administration users are able to set permissions for team members. These include the ability to provide them with admin rights, create/host meetings, view meetings, download meetings, share meetings and delete meetings	Confirmed
3.03	Is this access to the application managed by:- - Individual user profiles? - User groups or job roles?	Group Admins can manage access to the application and user profiles by editing individual user privileges. Groups of users can be assigned (with an admin lead) to retain recorded data only within the specific team members who created it	Confirmed
3.04	Can a report be produced detailing all current users, their user groups if relevant, and their authority levels and/or access rights?	Yes, there is an 'Organisation' tab which allows administration users add new members to groups, manage and change permissions and see reporting on usage	Confirmed
3.05	If menus can be tailored does the system limit the display of menu options to those for which permission has been granted for each user?	Yes, administration users have access to other tabs around reporting, permissions and groups. These are not visible for standard registered users of the platform	Confirmed
3.06	Does security allow for access to be limited to: - Read only? - Read/write? - Read/amend/delete?	Yes the system fully supports this functionality.	Noted
3.07	If data can be accessed by separate reporting facilities, such as ODBC or an external report writer, is the user access security control applied?	Data can be exported from the platform (video file, chat log, transcripts, files sent through the platform) and moved onto the clients environment. Security controls are then the clients responsibility. No other access is given	Noted
3.08	Does the system security integrate with Microsoft's Active Directory or other tools that provide a single sign-on?	OKTA SSO is being developed	Noted
3.09	Does the system provide 2-factor authentication (2FA)?	Yes	Confirmed
Passwords and access logs			
3.10	Is access to the software controlled by password?	Yes	Confirmed
3.11	Does each user have a separate log on (user id)?	Yes. The annual licence provides an organisational key. Each user will have to register by their domain and be accepted by their administrative users. They will then be asked to create credentials to access the platform, with the appropriate permissions their company administrator grants them. Each user will have their own unique logon details.	Noted
3.12	If there is no password facility please state how confidentiality and accessibility control is maintained within the software?	N/A	-
3.13	Are passwords masked for any user logging in?	Yes, all passwords are masked within data entry	Confirmed
3.14	Is password complexity available and enforced?	Yes. One digit, one upper case character, one special character is required and a minimum length	Noted
3.15	Are passwords encrypted?	Yes	Noted
3.16	Are users automatically logged off after a pre-set time not using the system? - Can the time period be changed? - Can any information be viewed without being logged in, including after logging off, if so what information?	Yes users are automatically logged off after a period of non-use. Information cannot be viewed within the system whilst logged off.	Noted
Deletion of transactions			
3.17	Is it possible to delete a transaction?	Yes, meeting sessions can be deleted on the system with user permission set by the administration	Noted
3.18	If so, then how are deletions controlled by the system?	You mark a meeting session for deletion and confirm. It is then placed for a 72 hour window into an erasure area. If the meeting session isn't retrieved within 72 hours it is permanently deleted	Noted

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3.19	Are deleted transactions retained in the audit trail (see below) and denoted as such?	The system provides audit and monitoring of all users. Audit logs are generated for logon, security event deletion and account creation, delete and amendment	Noted
Audit trails			
3.20	Does the system have an audit trail (log) which records all changes to transactions in the system?	Meeting records are recorded onto a blockchain. Any modifications to the original content are stated and any additional conversations are recorded under the same case, but as different instances for auditing purposes	Noted
3.21	Does this log also record any system error messages and/or any security violations?	The log for the application shows all user activity, Including user logon, any users trying to logon and failing and any spurious logon attempts. The cloud hosted platform provides access and alerts to any security related incidents associated with the platform. The system is subject to regular pentesting.	Noted
3.22	Is it possible to turn off or delete the audit trail?	No the audit trail is always on.	Noted
3.23	Does the software allocate a system generated sequential unique reference number to each transaction in the audit log, date and time stamp it and record the user id?	in MEA: Connexus, the combined video and other data files are taken as input and run through SHA -256 hashing algorithm which gives an output of a fixed length of 64 characters as an alphanumeric string. Just like a fingerprint, the 64 characters represent the interview content exactly as it was the moment the interview concluded.	Noted
3.24	Are all master file changes recorded in the audit trail?	Yes all transactions are recorded within the audit trail.	Noted
Compliance			
3.25	Does the system operate in a way that is compliant with data protection legislation including GDPR? How does the system facilitate this?	The application is compliant with GDPR. Privacy policy can be altered to reflect the client organisation. As the platform enforces mandatory recording, participants will have to comply with the privacy policy, in turn, complying with data protection laws	Noted
3.26	Describe your use of sub-processors if any?	N/A	Noted. Data is hosted in Azure (see 6.01)
Backup and recovery			
3.27	Is there a clear indication in the software or manuals as to how the data is backed-up and recovered?	All data recorded on the platform is backed up with redundancy, in the instance of a data centre failure. Users exporting content are then responsible for its security within their respective systems	Noted
3.28	How often are backups taken and to what point can restores be done?	The application uses Azure Backup to Backup all data. An incremental backup of the database runs every 24 hours. A fullback is run every seven days and kept for 52 weeks. Microsoft manages the exact schedule of these backups. PITR - (Point In Time Recovery) backups enable the database and storage to be rolled back to a specific point of time within seven days. Incremental backups run daily, and full weekly backups are kept for 52 weeks. The policy can be adjusted as required to meet the client's needs for monthly and yearly backups. The backups are geo-replicated across paired Azure regions. (UK West and UK South). Typical restore times for a full restore are between 10 minutes to 12 hours, depending on the type of Backup and restore. This is dataset size-dependent. The Backup service is fully automated and does not impact the performance or availability of the application.	Noted
3.29	How does the software facilitate recovery procedures in the event of software failure? (E.g. roll back to the last completed transaction).	Each of the interviews is saved and backed up.	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
3.30	If software failure occurs part way through a batch or transaction, will the operator have to re-input the batch or only the transaction being input at the time of the failure?	There are no batch or transactions. The product records the interview in real time	Noted
3.31	What features are available within the software to help track down processing problems?	Each event has a unique fault ID to allow tracing. We monitor the SaaS services through our service desk	Noted

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4.	<u>DATA PROCESSING AND REPORTING</u>		
Input and validation of transactions			
4.01	Is data input controlled by self-explanatory menu options?	There is no data input with the exception of registering new users to the platform. This process is self explanatory	Noted
4.02	Are these menus user/role-specific?	No	Noted
4.03	Can the creation or amendment of standing data (e.g. customer account details) be undertaken using menu options or dialogue boxes as opposed to requiring system configuration?	N/A	-
4.04	Does the software provide input validation checks such as: - [account] code validation? - reasonableness limits? - validity checks?	N/A	-
4.05	What control features are within the software to ensure completeness and accuracy of data input?	N/A	-
4.06	How does the software ensure uniqueness of the input transactions? (i.e. to avoid duplicate transactions)	N/A	-
4.07	Is data input by users validated by scripts or routines in the browser, or other client software, before transmission to the server?	N/A	-
4.08	Is data input by users validated by routines running on the server before data files are updated?	N//A	-
4.09	Does the above validation ensure that data entered in all input boxes: - Cannot be longer than a maximum length? - Cannot contain unaccepted characters such as semi-colons etc?	N/A	-
4.10	Are responses to erroneous data input clear so that they do not lead to inappropriate actions?	N/A	-
4.11	Does the software have an automatic facility to correct/reverse/delete transactions?	N/A	Not a transactional system.
4.12	If yes, are these logged in the audit trail?	N/A	-
4.13	Are all data entries or file insertions and updates controlled to ensure that should part of a data entry fail the whole transaction fails?	N/A	Not a transactional system.
4.14	Are messages provided to users clearly explaining whether the data entry or file upload has been processed successfully or not?	N/A	-
Import and export of data			
4.15	Can files/attachments be uploaded and stored against any transaction?	Yes, files can be uploaded via the chat function during a meeting. These files are stored and can be downloaded again as a meeting package	Noted
4.16	Is there an additional charge made for storage of uploaded files? - If yes, please indicate the cost.	The annual licence provides 1Tb of data as standard. Additional data can be purchased at a rate.	Noted
4.17	Can data be imported into the system from multiple types of files, e.g. XLS, text, CSV?	Yes, all files can be attached and sent through the meeting chat function	Noted
4.18	Explain how the system validates imports into the system and what happens to any import which fails?	N//A	No imports, purely upload of files.
4.19	Are imported /interfaced transactions detailed in the audit trail?	N//A	As above
4.20	Can data be exported from all areas of the system to multiple formats e.g. XLS, CSV, PDF, text; if so specify which formats are supported?	Video sessions can be exported. These include an mp4 video file, text documents for transcripts, pdf document for blockchain validation keys and any shared files and media during the session (all files)	Confirmed
Data processing			
4.21	Does the software ensure that menu options or programs are executed in the correct sequence (e.g. outstanding transactions are processed before month end is run)?	N/A	Not a transactional system.
4.22	Does the software provide automatic recalculation, where appropriate, of data input? (e.g. VAT)	N/A	As above
4.23	Is a month/period-end routine required to be undertaken?	N/A	As above
4.24	Is it possible to delete accounts if the balance is Nil but transactions have been recorded against the code?	N/A	As above

Ref	Requirement	Vendor Response	Reviewer Comments
4.25	What is the size and format of reference numbers and descriptions within:- - Ledgers? - Stock? - Currencies?	N/A	As above
4.26	How does the software guard against/warn about duplicate account numbers on set up?	N/A	As above
4.27	How does the software enable the traceability [from, to and through the accounting records] of any source document or interfaced transaction?	N/A	As above
4.28	What drill down/around functionality is available within the software?	N/A	As above
4.29	If the software uses a lot of standing information which changes frequently or regularly, does the software allow for such changes to be effected through the use of parameters or tables?	N/A	As above
Report writer			
4.30	Does the system have an in-built report generator or is a third-party solution used (if so please specify)?	The system has an inbuilt reporting function which provides data on Users, Storage, Minutes and interviews	Noted. Not a report writer.
4.31	Is the report writer based on a standard SQL-type approach and is it flexible and easy to use?	N/A	-
4.32	Can the report generator operate over the financial and operational aspects of the system, e.g. combining service metrics with financial information?	N/A	-
4.33	Is a comprehensive data dictionary provided to aid field selection?	N//A	-
4.34	Does the system provide a library of reports and templates which can be amended, saved and re-run?	N/A	-
4.35	Can users create their own reports? If so, what are the controls on users doing this?	Reports are set as standard.	Noted
4.36	Can users create saved searches /filters / queries?	N/A	-
4.37	Can regular reports be added to user menus in the appropriate area of the system?	N/A	-
4.38	Does the system support the production of on demand (interactive) and scheduled batch reports?	N/A	-

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5.	USABILITY		
Ease of use			
5.01	Does the solution provide a multi-language user interface?	<p>Mea: Connexus translates a large number of languages and dialects into English. To do this we use Microsoft Cognitive Speech Services which is continually improving in language support and accuracy. Please see the link below for a detailed list of languages and dialects:</p> <p>https://docs.microsoft.com/en-us/azure/cognitive-services/speech-service/language-support? Tabs=speech-to-text</p> <p>Further development work would be required to select different languages for the target translation. This could be implemented by selecting a target language post interview within the interview record management interface and creating a translated transcription in that language. However, this can be achieved by using translate services on web once the transcript has been downloaded.</p>	Noted. The interface for the system itself is currently only available in English and Portugese.
5.02	Does the system allow for customizable branding and UI (e.g. corporate colour palate, upload company logo, etc)?	Yes, company logo and company policies can be added. If required further branding can be provided at additional cost	Confirmed
5.03	Does the system have a similar look and feel and overall and consistency between screens and modules?	Yes, there is design consistency throughout the options and meeting rooms	Confirmed
5.04	Is data entry easily repeated if similar to previous entry?	N/A	Not a transactional system.
5.05	Does the software prevent access to a record while it is being updated?	N/A	-
5.06	Is there locking at file or record level?	All data is controlled within groups and only available to those within the group. Data cannot be amended once locked.	Not a transactional system.
5.07	Does the software allow for the running of reports whilst records are being updated?	Meeting sessions are available for review on session end (depending on session length). Data from other sessions can be reviewed whilst the current session is saving	
5.08	Can timestamps or user comments be added to transactions?	Yes Book mark comments can be added post meetings	
5.09	Is there the ability to store preferences and default values on a per-user basis. e.g. department/team/user?	Yes	
5.10	Does the system have the ability to provide user-defined fields with associated validation of data input?	No	Noted
5.11	Can the system provide user with reminders and notifications e.g. workflows?	No	Noted
5.12	If the system provides workflows, does it have functionality to substitute/delegate authorisations?	N/A	-
5.13	Is there the ability for users to define and configure layouts of letters and forms?	N/A	-
5.14	Can users save the parameters of searches?	N/A	-
5.15	Does the system have a "universal search" option, allowing a search to be undertaken over all modules of the system?	N/A	-
5.16	Can the system store menu option 'favourites' on a per user basis?	No	Noted
5.17	Can a user open multiple windows accessing the same or different modules of the system?	Yes	Noted
5.18	Can more than one software function be performed concurrently?	Yes	Noted
User documentation and training			
5.19	Is the manual provided as: - hard copy - on CD - by download - via a web-interface?	Hardcopy PDF documentation. The user manual is also available within the system under the 'Help' tab and can be downloaded.	Downloaded as a PDF

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5.20	Does the manual include: - An index or search facility? - A guide to basic functions of the software? - Pictures of screens and layouts? - Examples? - A tutorial section? - Details of any error messages and their meanings?	The user guide manual provides material on how to use the software and examples of use, photographic guides, setting up groups and configuration of settings and troubleshooting. It does include a guide to the basic functions of the system and makes use of screenshots.	Confirmed
5.21	Is context-sensitive help available within the system?	No	Noted
5.22	Is the manual and/or help editable by the user (subject to the permissions matrix)?	No	Noted
5.23	Will the Software House make the detailed program documentation (e.g. file definitions for third party links) available to the user, either directly or by deposit with a third party (ESCROW)?	No	Noted
5.24	Please detail the training options available?	Lockdown and Issured's internal resource can provide user training. Issured run a telephone support desk, UK working hours on Monday-Friday	Noted
5.25	Who provides training: - Software House? - VAR?	Software house and VAR	Noted
Support and maintenance			
5.26	How is the software sold: - Direct from the software house? - Via a Value Added Reseller (VAR) or Integrator?	Both directly and via Issured's vetted and appointed VAR's	Noted
5.27	How is the product supported: - Direct from the software house? - Via a Value Added Reseller (VAR) or Integrator?	Support is provided through Issured's support desk	Noted
5.28	Do VARs have to go through an accreditation process?	No	Noted
5.29	Is the software sold based upon number of named users or a number of concurrent users?	An annual licence is provided (annual subscription) for an organisational key of unlimited numbers. The solution charges a minute rate for usage (consumption rate) with economies of scale available for larger pre purchased minute packages	Noted
5.30	The supplier should detail the support cover options available, covering: - The hours provided? - Associated costs? - The global regions covered?	Mea Connexus includes full service support through the Issured ITIL 4 compliant service desk. The service desk is available 8am to 6pm weekdays except bank holidays and 9am to 5pm weekends.	Noted
5.31	Detail the process by which customers raise support requests and how these can be viewed/managed?	Users experiencing issues can email the service desk directly with all requests audited and managed through our service desk application "manage Engine" alternatively there is a direct line telephone number for urgent cases.	Noted
5.32	Please note the methods of support available: - Telephone? - Internet chat? - Remote access to customer workstation? - Other, please specify?	Telephone Help Desk & Email support	Noted
5.33	Do you offer service credits for failure to meet performance around SLA and uptime (if applicable)	We agree SLA's with the client, any service credits in the event of failing to meet would be subject to discussion.	Noted
5.34	What is your escalation path for tickets which have not been resolved within a reasonable time?	All tickets are managed on a consistent basis by the Service Desk Manager to ensure they are dealt with expediently.	Noted
5.35	How often are general software enhancements provided?	The software is owned by Issured and is subject to enhancements as and when developed and tested.	Noted
5.36	Will they be given free of charge?	General enhancements to the system are free to customers. Bespoke changes will be subject to pre-agreed costs	Noted
5.37	How are enhancements and bug fixes provided to customers?	Enhancements are implemented remotely.	Noted
5.38	Is "hot line" support to assist with immediate problem solving available?	A direct line telephone number for urgent cases.	Noted
5.39	If so, is there an additional cost involved?	There are no additional costs for urgent cases.	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
5.40	At what times will this support be available?	Mea Connexus includes full service support through the Issured ITIL 4 compliant service desk. The service desk is available 8am to 6pm weekdays except bank holidays and 9am to 5pm weekends.	Noted
Integration and www facilities			
5.41	Can the software be linked to other packages e.g. word processing, graphics, financial modelling, to provide alternative display and reporting facilities?	No	Noted. But not a transactional system.
5.42	Can definable links to spreadsheets be created?	N/A	-
5.43	Does the system provide secure document storage capability: If so, please give examples of the document types saved and what transactions these might relate to.	No, however Mea Fuse is the sister product to Connexus and is a secure file repository with digital data records including Audio, video and images stored and recorded onto the Blockchain.	Noted
5.44	Can documents be scanned into a secure repository?	No, however Mea Fuse is the sister product to Connexus and is a secure file repository with digital data records including Audio, video and Video and text transcript Data can be exported from the system in MP4 and text files	Noted
5.45	Does the system provide data migration tools for transactional and master data sets (e.g. employees customers, suppliers, journals, invoices).	Mea: Connexus can be configured to allow secure interaction with 3rd party application services, such as API connectivity. Issured can work with any 3rd party to not only provide a successful integration, but also look to implement a security code of connection to ensure any 3rd party involvement does not impact the Mea: Connexus application and its customers.	Confirmed
5.46	What connection mechanisms does the software have and what breadth of functionality in terms of: - operations (add, update, delete)? and - what transactions/data it can access? E.g. if webservices APIs available, then can customers connect to whatever software they wish?	Yes, it can be used on any internet browser based device and supports any mobile device with that access. It works with major internet browsers including, Chrome, Firefox, Edge and Safari but excludes unsupported applications such as microsoft internet explorer.	Noted
5.47	Does the system support mobile working?		

Ref	Requirement	Vendor Response	Reviewer Comments
6.	SAAS/HOSTED OPERATION		
	This evaluation covers the system but not the method by which it is delivered and/or contracted for. Potential users need to satisfy themselves on the security and disaster recovery aspects and licensing of the online system and any data protection issues of their own and customer/supplier information, contained therein, being held on the system, as well as the return of the data when the contract expires or is terminated.		
Data centres and customer data			
6.01	Whose data centres are used and where are these located: - If hosted -- where data centre controlled by a third-party? - If SaaS -- where the software vendor will be in control?	We use MS Azure and our data centres are located in the UK as a default. We can use any geographical location if required.	Noted
6.02	Does the customer get a choice of the jurisdiction in which their data resides?	Yes; data can be held in different regions to comply with Data Protection laws or regulatory laws depending on whom the service is being provided for.	Noted
6.03	What certification(s) do you or your platform operators hold relating to your data centres and your business operations?	MS Azure hold all data centre certifications.	Noted
6.04	Do you or your platform operator have an SSAE16 (System and Organization Controls) report available?	We use MS Azure they have SOC1, SOC2 and SOC3.	Noted
6.05	What are the physical controls over the:- - Premises? - Fileservers? - Communications equipment?	We use MS Azure they have SOC1, SOC2 and SOC3.	Noted
6.06	Is the space in this/these data centre(s) shared with any other companies?	We use MS Azure they have SOC1, SOC2 and SOC3.	Noted
6.07	Is data for different customers/companies kept:- - On separate servers? - In different databases? - In separate database tables? - In a database with data for other customers and companies using logical security to partition customers' data?	We use MS Azure they have SOC1, SOC2 and SOC3. We ensure that there is separation between geographical regions for data. We use different tenancies and storage separation.	Noted
6.08	How is it ensured that data for different customers and companies is reliably identifiable and only accessed by authorised users for each customer/company?	Different storage accounts for each client.	Noted
6.09	What controls are in place to prevent users from one customer/company accessing data from another customer/company by accident or by design?	Credential access, unique password, MFA.	Noted
6.10	How is [Internet] communication traffic monitored to identify potential problems before they happen: - From a performance perspective? - From a security standpoint?	Monitor and use alerts. Application is configured to only accept TLS 1.2.	Noted
6.11	What procedures are in place to prevent a break in Internet Connection (at the server, client or in between) from causing data corruption?	Session is ended via client. Connection is restored once a user reconnects so no data is corrupted.	Noted
6.12	Are communications between the user's computer and the software service encrypted: - User log in data only? - All data exchanged between user client and software service?	Yes	Noted. See also 6.24
6.13	Is data on your servers encrypted at rest?	Make use of Microsoft services to 'Microsoft Managed Key' services for their encryption.	Noted; see 6.24
6.14	Is a test environment provided to test configuration changes? If so, is there an additional charge for this?	Yes - No charge, bespoke development may incur additional charges.	Noted
Access to customer data			
6.15	What are the implications of the Data Protection Act over information held by the hosting service provider, and how does the vendor mitigate these?	Microsoft Azure comply to the same Data Protection legislation.	
6.16	Are you subject to any legal or regulatory requirements obliging you to retain a copy of customer data?	All data that is retained in accordance with guidance. We follow legal and regulatory procedures. Data Protection Act 2018 is followed.	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
6.17	Who will be able to access or see customer data?	The data is only available to the organisation that created the data. In addition to this the system allows the creation of groups with named users in the group. This means that only users with the given access rights can see the customer data. Further controls can be implemented for users within a group that restrict their rights to create/view/download/delete or share records.	Noted
6.18	Explain the procedures to prevent unauthorised access from staff, or contractors, working for the service provider or any other people with access to the service provider's internal systems.	Role based and mandatory access control is in place to mitigate any unauthorised access to the internal systems.	Noted
6.19	Explain the release management procedures in place and the associated segregation of duties ?	There is one in place. ITIL 4 Release Management Procedure in place.	Noted
6.20	Is there sufficient segregation of duties preventing system developers from accessing and changing live applications and data files?	Issured provide a segregation of duties for all key roles including technical and security review. As per our ISO27001 and NIST compliance.	Noted
6.21	Explain the review and approval procedures covering system operations staff when emergency changes need to be made to live applications and data?	The Senior Leadership Team approves emergency changes. Issured have an ITIL 4 compliant service desk and have documented procedures and processes in place to ensure close customer engagement whilst changes are being considered and implemented.	Noted
6.22	Is an audit trail always maintained of these emergency changes?	Yes the audit trail is always on.	Noted
6.23	What procedures are in place when members of staff leave to ensure that their system access is stopped?	All Access is revoked when a member of staff leaves which is managed by our Service Desk team.	Noted
Platform and service levels			
6.24	Which databases can be used (Hosted) or are used (SaaS)?	Database services are provided by an MS Azure SQL Database PaaS Service and all data is encrypted at rest using Transparent Data Encryption.	Noted
6.25	What forms of user authentication are supported e.g. user names, passwords certificates, tokens etc.?	Transparent Data Encryption. TDE encrypts the storage of an entire database by using a symmetric key called the Database Encryption Key (DEK). On database start-up, the encrypted DEK is decrypted and then used for decryption and re-encryption of the database files in the SQL Server database engine process. DEK is protected by the TDE protector.	Noted
6.26	What is the proposed product/service availability percentage?	Service is ran on Azure so the availability is sitting at 99.9%.	Noted
6.27	What percentage availability has been achieved over the past 12 months?	99.98%	Noted
6.28	Is a service level agreement ("SLA") offered regarding: - Service availability? - Data recovery?	Issured have SLA's in place with Microsoft.	Noted
6.29	Is the service available 24x7 or are there downtime periods for maintenance?	4 times a year scheduled updates happen. Around 30mins a time and done in out of office periods. For example 4am.	Noted
6.30	Is the customer made aware of maintenance periods in advance?	Yes, we operate an ITIL 4 Compliant service desk and have documented procedures and processes to ensure customer communication and engagement regarding system maintenance and change. All changes are subject to our Change Control Process.	Noted
6.31	Does the application software:- - Require any client software to be installed on the user's computer? - Work entirely within Internet Browser software on the user's computer?	No, the product is a SaaS product so it is entirely hosted on Azure and accessed via the internet.	Noted
6.32	Where the product/service relies upon downloading and running an executable program, has that program been secured with a digital certificate to verify the source and integrity of the program?	N/A	-
Platform security			
6.33	What security steps are taken to prevent and detect intrusion attempts?	Microsoft Azure have systems in place to detect and protect against intrusion attempts.	Noted
6.34	Is firewall hardware and software used to protect the live systems from unauthorised access?	Systems are run via Microsoft Azure so all information relating to boundary protection is in align with Azure standards and captured in the technical design documents (HLD and LLD).	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
6.35	Which monitoring software is used to create alerts when intrusion attempts are suspected?	Azure alerts are in place which the service desk team monitor.	Noted
6.36	Are designated staff responsible for receiving and urgently responding to these alerts?	The service desk team have 24/7 coverage of the Azure alerts.	Noted
6.37	Have clear procedures been established for identifying and responding to security incidents?	Issured has an Incident management process which can be invoked if there has been an incident.	Noted
6.38	Is all security sensitive software, such as operating systems and databases, kept up to date with the latest software patches? Please indicate how regularly updates are applied.	Issured do not use any unsupported systems, all systems are kept up to date and no legacy systems are used. Software updates are automatically installed. Any major OS updates are reviewed by the technical team before being installed.	Noted
6.39	List the procedures and software tools in place to prevent or detect and eliminate interference from malicious code, such as viruses?	Issured make use of a managed service, which ensures all devices are centrally supported. All Issured laptops have Sophos end point security installed, which not only controls the ability to block un authorised external components, such as USB media devices, but also provides Malware detection. In addition all of Issured code deployed to support its applications is checked to ensure no malicious code is embedded during development. As part of the front end protection to the Issured infrastructure and Mea suite of applications the Azure WAF provides protection through the implementation of the OWASP ruleset.	Noted
6.40	Is a system log maintained by the service provider that details - User access? - User activity? - Error messages? - Security violations?	Service Desk and Tech team receive alerts which can be reviewed when needed. This includes User access, User Activity, Error Messages and Security Violations.	Noted
6.41	Is this log available to the customer?	Security logs are available within the Connexus app to be viewed by each customer. If any additional logs are required to support an investigation, such as infrastructure logs then they can be provided when requested.	Noted
6.42	Have there been any successful unauthorised access attempts been made during the last year? If Yes:- - What was the effect on the business and users? - What steps are in place to prevent this happening again?	No	Noted
6.43	Is penetration testing regularly carried out by (please indicate frequency of tests): - Staff specialising in this field? - External specialists?	Penetration tests are conducted annually or following any update to the software and are carried out by external parties carrying CREST accreditation. The platform is vulnerability scanned on a weekly basis. We conduct our own weekly software based tests.	Noted
6.44	If penetration testing by a specialist is not performed regularly, please indicate the main procedures in place to identify weaknesses?	N/A	-
6.45	Are security procedures regularly reviewed? Please indicate frequency of reviews.	All procedures and documentation are reviewed regular. There is a document register with dates to be reviewed for. Range from 6-12 months document/process dependant. We are ISO 9001, 27001, 22301 certified.	Noted
6.46	What security reporting is provided demonstrating compliance against certification(s) and policy(ies)?	Issured are ISO27001 Certified and NIST and CJIS compliant.	Noted
6.47	Are any security breaches communicated to customers?	All security breaches that may impact a user are communicated.	Noted
Backups by the service provider			
6.48	In relation to backups undertaken by the system provider please explain: - How is a customer's data backed up? - How often is this undertaken? - What is backed up? - What's the media used? - Where are backups stored? - How many copies are there? - How long are they retained for? - Who has access to them? - Is the data encrypted?	Issured make use of the Microsoft infrastructure which provides primary and backup services to support all redundancy requirements. This is used for both Issured corporate infrastructure and Mea Connexus.	Noted, and see 6.49

Ref	Requirement	Vendor Response	Reviewer Comments
6.49	How frequently is a test-restore of backups undertaken?	Point in time backup of the database is taken every 24 hours and retained for 7 days along with transaction log backups every 10 minutes.	Noted
6.50	Can the provider restore from a backups that it has taken at a customer request?	Yes	Noted
6.51	Does a customer have the ability to undertake their own backups?	They can download data to local storage.	Noted
6.52	If so, can a customer restore data a backup that they have taken?	They can restore locally but would not be able to push that data back into Connexus.	Noted
Platform recovery			
6.53	What contingency plans are in place to enable a quick recovery from: - Database or application software corruption? - Hardware failure or theft? - Fire, flood and other disasters? - Communication failures?	We have a Business Continuity and Disaster Recovery Plan that considers all these areas of interest. We are ISO 22301 certified.	Noted
6.54	How often are these plans tested?	BCP plans are tested regularly and the whole plan is exercised every quarter.	Noted
6.55	How often are these plans reviewed and updated?	BCP plans are reviewed throughout the year and updated.	Noted
6.56	What are your: - Recovery Point Object (RPO) standards? - Recovery Time Objective (RTO) minimum standards?	Backups are done regularly so data loss can be restored. 24hours guaranteed but it can also be restored from a few mins. Downtime is minimal. MS Azure has the tools to keep the service running at all times.	Noted
6.57	If transaction records are dated and time stamped are the times used local to the user or based on where the server is located?	Time stamps are always UTC. Server side.	Noted
6.58	What protection is in place to enable users to able to access their accounting and other data if the service provider should experience serious difficulties, cease trading or decide to stop providing the service?	We use industry standard tools to ensure data is still available if any of the listed issues were to arise.	Noted
6.59	If the system is hosted are there arrangements in place for this third party to continue providing a hosting service in the short term to allow time for customers to negotiate their own arrangements? If so, how long does the arrangement allow?	Yes, there is at least 6 months for any negotiations to be conducted with third parties.	Noted
6.60	Are there any individual members of the vendor's staff whose leaving or illness would significantly reduce, or even stop, the service provider's ability to provide a full and reliable service to customers?	No	Noted
Platform change management			
6.61	Describe your approach to upgrades including what option customers have not to take upgrades (if any)?	For the standard application customers will be contacted in advance and upgrades provided as across the user community. Whre the the customer has a bespoke deployment upgrades will be discussed with the customer prior to deployment which may have additional associated costs.	Noted
6.62	Are users able to test the application before new versions go into live use?	Yes they will be invited to participate in our testing.	Noted
6.63	Are users given notice before application changes are applied to the live system?	Yes there is consultaion with all users prior to upgrades being applied to the live system.	Noted
6.64	Are changes delivered into the live environment "switched off" to enable users to test them before enabling them for their environment?	There are no changes made to the live environment without full regression testing on our test environment which is a full replicated live environment. Users are informed of any changes prior to live deployment to provide sufficient notice for adoption. Where changes will impact existing functionality users are invited to be part of the UAT in the test environment.	Noted
6.65	Describe what testing and QA processes are undertaken before upgrades and other changes are made live/available to customers?	All updates/upgrades to the live system are tested in production environment separate to the live application. Once tested and verified internally we can then go live with full rollback plans in place.	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
6.66	If a hosted system, explain the release management procedures in place and the associated segregation of duties ?	We have a documented release management procedure in place. This is managed through our ITIL 4 compliant service desk manager. The procedure details the processes for release and defines the roles within the process. Release Management Procedure in place. All releases are subject to scrutiny through out Change Advisory Board. Any release to the live environment are subject to testin on the test environment prior to release. We also have a documented Computer Emergency Response Team to manage any security related incidents.	Noted
6.67	Are users informed when they next login of the application changes that have gone into live use?	All users are informed of changes to the application.	Noted
6.68	Do customer staff have to take any action (e.g. regression testing) when new editions, patches or upgrades are released? If so, please describe what they should ordinarily do.	No	Noted
Subscription options			
6.69	What is the minimum level of commitment must the customer sign up to, e.g. 36 months?	12 months annual licence.	Noted
6.70	Where online payment is used, what type of security is used to protect sensitive information?	We use invoice payment.	Noted
6.71	Where online subscription / payment is used, is an invoice provided to the customer and, if so, in what format?	Invoices are provided in PDF format.	Noted
6.72	When subscriptions need to be renewed, what advance notice is provided and what is the time limit for renewal?	At least 2 months notice is provided.	Noted
6.73	Is there a procedure for late renewal and is there a time limit after which subscriptions cannot be renewed?	1 to 3 months grace period depending on the size of the account.	Noted
6.74	How soon after creating or renewing a subscription (if applicable) can the system / service be used?	Immediately	Noted
6.75	What notifications / confirmations are provided to the customer regarding subscriptions and payments?	Receive email from contact manager and phone call from the service desk.	Noted
6.76	To what extent are users able to access their accounting and other data if: - They miss one or two payments? - They cease being customers?	If 1 or 2 payments are missed the data will always be available. For a term that is agreed between Issured and the Customer based on their circumstances.	Noted
6.77	At the end of the contract term, how long does a customer have to obtain a copy of their data from you?	For a term that is agreed between Issured and the Customer based on their circumstances.	Noted
6.78	At the end of the contract term, how is a customer's data destroyed (if appropriate) and will that destruction be certified?	Removal of storage container where data is held. We work wit the customer to ensure that they have all the data that they require before we conduct a complete wipe of the data. We will confirm the deletion of the data with the customer.	Noted
6.79	What is your processes regarding disposal of end-of-life and failed hardware devices that were used to operate your service?	No hardware is used for as it is all run via MS Azure.	Noted
SaaS/Hosted Reporting			
6.80	Are reports produced from the same software as the financial applications or is separate reporting software used?	Yes	Noted
6.81	Does any application software (i.e. other than a web browser or PDF reader) need to be installed on the user's computer in order to prepare or view the reports?	No	Noted
6.82	What browser versions are support: - On desktop/laptop (PC, Mac, Linux)? - On Tablets? - On mobiles?	Connexus can be used from any modern web browser but we recommend using Google Chrome or Microsoft Edge as the preferred browsers.	Noted
6.83	Is access to the reporting facilities and data controlled by the same procedures as access to the main application?	Yes	Noted
6.84	If it's different, explain the user access control facilities available to ensure information is only viewed by users with appropriate authority?	N/A	-

Ref	Requirement	Vendor Response	Reviewer Comments
6.85	In what electronic formats are reports produced:- - PDF? - XML? - MS Excel spreadsheet? - CSV file? - As html for viewing in a web browser? - Other, please specify?	CSV File, PDF	Noted
6.86	Are report documents stored on the web server or on the user's computer? If stored on the web server, are they secure to ensure only users with appropriate authority can get access?	Reports are viewable on the platform and can be downloaded to the users local computer.	Noted
6.87	For documents viewable in a browser is any data stored on the user's computer in a web browser cache or temporary file? If Yes: - Is there any protection against other users viewing the report or data on which it is based? - Is it clear on the reports when they were produced and the date of the data on which they are based, so the user can tell whether they are viewing out of date information?	No	Noted
6.88	Are communications between the browser and the server encrypted for any report related communications?	Yes	Noted
6.89	If reports are produced dynamically each time the user views them can historical reports be reproduced at any time?	Yes	Noted
6.90	Can reports viewable in a browser be navigated dynamically by users? For example: - Enabling drill down to more detailed information? - Altering which columns and rows of data are displayed. - Choosing time periods? - Specifying selection criteria?	This is not a transactional system so a report writer is not included.	Not a transactional system so a report writer is probably not needed.
6.91	Can report data be reliably copied and pasted direct from browser viewable reports to an MS Excel spreadsheet retaining any table layout?	Users can export the data from Connexus into a report in MS Excel format.	Noted
6.92	If reports are incomplete, for instance due to a poor Internet connection, is sufficient information provided to enable the user to notice that some of the report is missing?	This is a connecton based service and all reports are available. If the service is interrupted it does not impact the reports.	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
7.	<u>SECURE MEETING SOFTWARE</u>		
Global Setup			
7.01	Does the system provide for the setup and maintenance of the details of the organisation using the software and valid users within that organisation?	Yes and each organisation can apply their own organisational branding and privacy policies.	Confirmed
7.02	Can a user have multiple organisations setup under one umbrella account, i.e. can an organisation (e.g. an accountancy firm) be using the platform on behalf of its customers?	Yes, as long as they are granted an organisational email domain.	Confirmed. Multiple groups can be setup under one firm's domain (e.g. HR, Board, etc).
7.03	If so: - Is it possible to switch between these entities without re-logging into the platform? - Are there restrictions on more than one user working on the same [single] customer at the same time? - Are there restrictions on one user working on multiple customers at the same time?	Mea: Connexus has been designed to ensure all customer data is presented within the customers own instance. There is no restriction on users working on the same customer data as long as they have the correct permissions.	Confirmed. No need to logout/in to switch between groups.
7.04	Can the system operate in multiple languages? If so, please state which are supported.	Yes, it can be further localised. Current language options are English, Portugese and we can apply other languages with development and additional cost.	Confirmed
7.05	Does the platform directly integrate with on-line systems/services, e.g. email, document storage ,collaboration, encryption? If yes, please list the packages/services that it can connect with and explain the method of integration (e.g. dedicated connector, webservices, etc)	No	Noted
7.06	Does the platform make use of global lists, e.g. Postcodes? If so, specify what is provided.	No	Noted
7.07	Does the system allow a user to use multiple devices to support mobile working, e.g. a workstation, phone and/or a tablet?	Yes	Confirmed
7.08	Can the system work in an "offline" mode, with recordings/files transferred to the service once Internet connectivity is available and enabled?	No	Noted
7.09	Is stored data encrypted?	Yes	Noted
7.10	Does the system provide inbuilt workflow functionality?	No, but a standard process is followed.	Noted
7.11	Does the system have an audit trail that includes details of: - Interview setup and any alterations? - Participants? - Chats, messages and any file transfers? - Changes to files? - Which user has uploaded/deleted files? - Any data that sent to/from Users? - Original call handler?	Yes, the video file acts as immutable provenance record, but participants, messages and file transfers, retrospective changes to video file, erasure can be shown through the audit trail	Noted
7.12	Does the system have customisation features that a company could use to apply their "brand" to what users see/use?	You are able to edit the Banner Logo and Lobby Logo to your organisational branding	Confirmed
7.13	If so, does the system allow the customer to personalise with: company logo, organization privacy policy, colour scheme, layout adjustment/customisation?	Yes to all except layout adjustment. For bespoke deployment layout can be changed but this will be at additional cost	Confirmed
7.14	Does the system hold the various meeting recordings, transcriptions, audit files, etc in the system's own database or in external Cloud storage? If the latter, please detail what is used?	This data is stored within MS Azure	Noted
7.15	Does the system provide a synchronised meeting time-clock for all participants? If so is this based on: - A central time zone? - The time zone of the meeting host? - Other, please specify?	Yes; the time will change by location. The central time zone is shown as the reference (GMT) and the local time zone for each participant and host	Noted
User setup and management			
7.16	Does the system provide a permissions matrix so that rights can be set at user and group level? If so, what role groups are provided?	Yes, permissions are granted to allow the user; Group admin, create host interviews, view interviews, download interviews, share interviews	Confirmed

Ref	Requirement	Vendor Response	Reviewer Comments
7.17	Does this apply to: - Specific areas of functionality, e.g. meeting host? - Manually adding/editing recordings/files? - Authorisations? - Controlling access to interview recordings? - Other, please specify?	Yes to all	Confirmed
7.18	Is it possible to define delegated access?	Yes. This is available on the groups function. Access to files can be shared or ownership transferred.	Confirmed
7.19	Can multi-level authorisations be set?	Use of the system is subject to tight access control and multi-level authorisations can be set.	Noted. Detailed access permissions are supported.
7.20	Are there different parts of the user interfaces and features which are dependent on the role of the user?	Yes for example admin users have access to additional features such as Management Information and account information and audit data	Confirmed
7.21	Does the system allow for the user to customize their own profile?	Yes	Confirmed
7.22	Can the system have more than one local administrator?	Yes	Noted
7.23	Does the system have a limit to the number of users in one organisation?	No	Noted
7.24	Does the system have a limit on the number of groups in one organisation?	No	Noted
7.25	Is there a process for adding new users to the system that requires a secure validation process? If so, explain how this operates, e.g. email-based validation, password(s), MFA, other?	New users need to register by domain. An email is then sent to their administrator asking to provide access to the user. This has to be accepted within a 24 hour window. The user receives notification and sets credentials and MFA	Confirmed
7.26	Does a similar process operate for resetting the password of an existing user?	Yes	Confirmed
7.27	Does a similar process also operate when a user receives a request to join a meeting/interview (see below)?	Registration is not required but the user must accept the terms and privacy policy to gain access to the meeting session. The host controls who can access the session and has full control to allow entry. There is lobby. Each interview link can be disabled by the host as required.	Confirmed
Meeting/interview setup			
7.28	Does the platform allow the creation of cases/projects to which one or more meetings/interviews can be attached?	Yes. A case have multiple interviews allocated and managed by groups which represent a project or case Any interview over 120 minutes duration creates a separate concatenated meeting recording instance. Repeated calls off the same meeting session are available and created as an auditable log. The individual case recordings are all contained within the group and available to the team assigned to the group.	Confirmed. [A case is a Group in Connexus.]
7.29	Does the system enable a meeting host to setup a meeting at a pre-defined time and add participants to that meeting?	The meeting link is copied to a calendar entry.	Confirmed
7.30	Do meeting invite recipients (participants) have to be users of the system or can "guests" be added?	No; guests can be invited.	Confirmed. A non-user would need to accept the T&Cs before they join the meeting.
7.31	Does the system incorporate a way to validate that an interviewee / guest is who they claim to be? If so, please explain how this is undertaken (e.g. face recognition against identity documents)?	No filters are allowed on the video. Guests are granted access by the admin user who sends out the invites. They must verify using photo ID at the start of the interview. In addition we are working on integrating verification approaches in the backlog	Confirmed

Ref	Requirement	Vendor Response	Reviewer Comments
7.32	Can meeting participants be of a number of different categories? If so, can these include: - Host (full access to manage a meeting)? - Participant? - Audio-only participant ? - Hidden (a so-called "silent observer")? - Limited participant (certain features removed, such as messaging, chat, file transfer, etc)? - Other, please specify?	Yes. Admin Host. Up to 16 participants for recording, video or audio. Silent observer. Functionality is present for everyone, though the host can request that private messages are provided in the post meeting transcript	Confirmed
7.33	Can the meeting date/time and participants be subsequently changed by the host without the need to delete the meeting and set it up again?	The meeting isn't scheduled by time and can be accessed or returned to, as long as it hasn't been erased (or marked for erasure).	Confirmed
7.34	Does the system notify meeting participants of a meeting electronically? If so, is this by: - Email (containing a URL)? - SMS (containing a URL)? - Other, please specify?	The user needs to export the meeting link from within the platform and paste it into an email template/ diary appointment through their email client	Confirmed, an email with a link is sent out.
7.35	Does a participant need to electronically confirm their invite before they are activated/enabled to subsequently connect to the meeting?	Yes, the participant must adhere to the platform policies and mandatory recording function	Confirmed
7.36	Can a participant's access to a meeting be limited to a single or group of workstation-device IP addresses?	No Guests are granted access by the admin user who sends out the invites.	Confirmed
7.37	Does the system have the option to record the meeting?	Yes, meetings are mandatory recorded. We have in the backlog to allow the Host to set this function but it is being reviewed by our client base before making any changes.	Confirmed
7.38	If so: - Is this both video and audio, or limited to audio only? - Do participants have the ability to opt out of this?	Video and Audio. Participants have no current ability to opt out of mandatory . This is being considered in the backlog once client feedback has been received.	Confirmed
Meeting progress			
7.39	Must a meeting/interview be "started" by the host before it becomes available for participants to log into it?	Yes	Confirmed
7.40	Does the system provide a number of video and audio options for a participant's workstation-device on connection to the system?	Yes, it provided camera and speaker options	Confirmed
7.41	If so, does the system have the ability for a participant to check that their video/audio operates correctly and adjust the connection parameters if not?	Yes, prior to entry	Confirmed
7.42	Does the "host" have the ability to: - Start and end the meeting? - Transfer control of the meeting to a new host? - Pause (stop recording of) the meeting? - Set mute/unmute one/some/all participants? - Turn recording on/off? - Remove and/or block a participant.	Yes to all with the exception of turning the recording on and off (all sessions are mandatory recorded and all users have accepted this prior to usage)	Confirmed
7.43	Does the system provide additional in-meeting functionality such as: - File publishing between some/all participants? - File sharing? - Screen sharing? - Chat? - Private chat/messaging? - Breakout-room / lobby functionality?	The system provides file sharing, screen sharing, private and public chat functions. Book Marks can be applied through the interview and available for review post interview.	Confirmed. Bookmarking feature is very flexible.
7.44	During a call/interview, does the user have the ability to change the view of the participants i.e. thumbnail view, spotlighting participants and pinning a video etc.?	Yes to all	Confirmed
7.45	Does the system ensure that a 'hidden' participant cannot interact with other participants and is only visible to the host?	Yes, the silent observer is invisible to everyone except the host who can see their presence in the participants list	Confirmed
7.46	Does the system notify of: - Audio device quality issues? - Low network bandwidth? - If display is disconnected?	Yes, the system notifies poor quality/ bandwidth and prioritises audio over video should the connection bandwidth dip	Confirmed

Ref	Requirement	Vendor Response	Reviewer Comments
7.47	Is it possible to change a participant's workstation-device's connection settings during a meeting (e.g. to improve video/audio quality)?	Yes users are able to cahngre their device audio and visual settings. The system also facilitates audio only meetings where connectivity is an issue.	Confirmed
7.48	Can the system display a watermark on the screen during an interview/call? If so, does this also appear in any recording taken of the session?	No	Noted
7.49	Can the system allow users to timestamp/bookmark key times in the interviews?	Yes, the admin can bookmark during the session or post session retrospectively	Confirmed
7.50	If so, do the timestamps allow comments to be made to provide context?	Yes post interview but they do not alter the immutable record	Confirmed. You can annotate a bookmark.
7.51	Can a participant be added to a meeting "on the fly" by the host?	Yes	Confirmed. Just send the link.
7.52	Does the system allow the user to see another users status (in a meeting, unavailable, etc)?	No	Confirmed. You can see if a participant is on mute.
7.53	At the end of the meeting, does the system have a function to give feedback on how the user was speaking? If so, does this include ratings relating to: - Pace? - Inclusiveness? - Repeated phrases? - Other, please specify?	No. This functionality could be built in to future updates.	Noted
Post-meeting functions			
7.54	Does the system provide automatic transcription of a call? If so: - Can it provide live transcription? - And, if so, in what format? - And are stored transcripts encrypted (at rest)?	Yes, the platform produces an auto transcript through a txt format that complies with UK court evidential standars, which can be universally accessed. Stored Transcripts are encrypted at rest.	Noted
7.55	Does the system allow selected users to subsequently download: - A recording of the meeting? - A transcript of the meeting?	Yes; a meeting package can be downloaded providing a recording and transcript of the meeting	Confirmed
7.56	Can the meeting host limit the meeting attendees who can download recordings/transcripts?	Only the host group administrators and approved group members are allowed to download recordings and transcripts. Yes the meeting host can setup a group and vary the permission of group members.	Confirmed. User permision based.
7.57	Is it possible to share recordings and transcripts with third-party non-attendees of the meeting (e.g. lawyers) directly from the platform? If so: - Explain how this is facilitated? - How is this done securely?	Yes if they have been provided with a domain account and are part of the Group. Setting up a group and then adding the remote user to this group with a Domain account logon who only has access to the Group.	Noted
7.58	Is there a limit on the number of stored recordings by storage or time?	No, it depends on the size of the storage allocated.	Noted. Additional storage is available at an extra cost.
7.59	Does the system provide a way of ensuring that the recording made of the meeting and saved into the system is a valid copy of the whole meeting and is immutable?	Yes this is a key function of the system using blockchain technology. There is no access to the recording until it is block chained.	Confirmed
7.60	If so, please explain: - When is this process undertaken; - How this is ensured, e.g. hash-totals, checksums, blockchain-based validation.	At the conclusion of each interview, a SHA-256 hash is created as a "digital fingerprint" of the packaged recording, which is then committed to the blockchain record. Subsequently, copies of the interview package can be revalidated against the immutable blockchain record. Even a one-pixel variation in the file will result in a validation failure indicating that the recording has been modified.	Noted
7.61	If so, does the system generate (and store within the system) a report that details the meeting date/time, the file-name of the meeting-recording and the associated check-data.	The system generates a full record of the meeting. This includes the start and end date and time of the meeting, the duration of the meeting. The file name of the meeting and the associated data. The URN of the meeting and a validation statement that includes the Hash code and blockchain transaction identity.	Noted
Operational Dashboards			

Ref	Requirement	Vendor Response	Reviewer Comments
7.62	Does the platform provide a series of dashboards/lists to inform the user of the status/progress of the various meetings/interviews being managed?	Yes, the dashboard reports on users, storage, minutes and interviews	Confirmed
7.63	Can the user produce separate lists of meetings at varying statuses, e.g.: - Draft - Prepared and participants invited - Ongoing - Completed - Awaiting review/sign-off - Archived - Other, please specify	Yes, the user can arrange meetings, view completed meetings, reuse a meeting session	Noted. Filters are not available but lists can be sorted and archive lists displayed as well.
7.64	Can the list(s) be filtered by: - Date [range] - Contract - Specific participants - Other, please specify	The list can be filtered by date, Group, Duration, interviewer name, storage	Noted, as above
7.65	Is it possible to drill though from a dashboard into the transactions referenced, e.g. the video of a meeting? If so, please state what is possible.	Each user has access to their own recorded interview and also to those they been granted access from a Group. A user interview dashboard provides visibility of the interviews and allows them to filter interviews in numerous ways	Confirmed
Reports			
7.66	Does the system produce reports on: - Attendance of meetings - Time of attendance/exits - Recording/call duration - Storage used per recording - Time of recording - Weekly/monthly Periodic usage Please outline any additional features?	The system produces reports on: - Recording/call duration - Storage used per recording - Time of recording - usage - Storage consumed All the above data is captured within the audit trail.	Confirmed
7.67	Can these reports be filtered by: - Item/transaction type? - Date range? - Other, please specify?	Date range yes.	Confirmed
7.68	Does the system allow the layout of reports to be customised: - Font? - Paragraph style? - Page format? - Watermark, e.g. "Draft"? - Company logo/graphic? - Other, please specify	Audit reports are exportable in Microsoft excel format.	Noted
7.69	Are all reports adequately titled and dated? e.g. report name, customer name, pages, numbers etc.	N/A	-
7.70	Do the reports provide totals where applicable?	N/A	-
7.71	Does the report writer have the facility to scroll up and down when output to screen?	N/A	-
7.72	Can all reports be print previewed?	N/A	-
7.73	Can reports be output directly to other formats e.g. Excel, CSV, txt, XML, PDF etc. for any period of time required? - If so, please state the formats supported.	Audit reports are exportable in Microsoft excel format.	Noted