Capitalise II - IT FAQs

What is different about Capitalise II?

It is a cloud based application. Each licence allows the user to install the app onto one device (Windows or Mac) and to create an online account so they can access the app and their cases at any time.

Where is the data stored and how secure is it?

The data is stored on an Amazon web server via a company called mLab (aka mongo Lab) in Dublin.

The app from which the data is accessed is stored on the same server via a company called Meteor Development Group (MDG).

Amazon adheres to the highest standards of security and has to meet the requirements of some of the most data-sensitive organisations in the world (https://aws.amazon.com/security/).

All communication between the users and the server is also encrypted using standard HTTPS encryption.

The data is only accessible through the app via a created account. These accounts are created entirely with industry standard technology, developed by MDG, upon which 100,000s of apps rely.

The upmost care has been taken to limit access to private data - even within a group of linked accounts any access to the data within a case must first be requested and then access granted by the creator of the account.

Data is managed with a publication/subscription system - the server has a system to publish data based on the account that is currently logged in and subscribing to the data. It publishes all cases that a user is subscribed to and a user can only subscribe to a case with the permission of the creator of the case. This ensures no one but the intended recipients of the data can get any access.

What data is stored?

Because of the nature of a *Capitalise* calculation, the only client data that is stored is the recipient's name (which can be anonymized if wished) and their date of birth. Amounts of income/pension may be added in some cases, but with no need for a detailed description, so are very generic.

(Note that 50% of the time the recipient is likely to not be your client, but the other side in the case.)

How are accounts linked?

Once the accounts are set up, a group can be created and the group admin can invite users to join that group.

The group admin can choose to remove someone from the group at any time. The user can also choose to leave the group.

Can an organisation choose to own the data?

Yes. When a group is created you are asked if the organisation should own the cases created by members of the group – as opposed to the individual user.

If you say yes, then if a user leaves or is removed from the group, then cases he/she has created will be passed onto the group admin user.

It also means that cases created by users of the group will be deleted if the group is deleted.

If you say no, then cases will remain linked to a particular user even if they leave the group.