



**Customisable Information Hub for the Built
Environment**

Service Definition

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1. Introduction

Company Overview

Morta is a startup founded in 2018 to transition the built environment from analogue document-centric workflows to automated data-centric workflows. To do so, Morta has developed a next-generation spreadsheet for construction, project, and asset management. Our solution enables organisations to improve data quality, connect data, and automate processes.

Morta is currently working and has worked with several leading organisations across the public and private sectors, including the Ministry of Justice, Madison Square Garden Entertainment, Mott MacDonald and the Manchester Foundation Trust. Morta has received multiple awards such as 'Ones to Watch' for Product of the Year at BIM Show Live 2020 and was named as a Top 10 Startup by Construction Europe. In late 2018, Morta was the recipient of a Modern Methods Innovate UK grant to deliver its end-to-end requirement management platform.

Morta is a software company dedicated to the built environment that provides a customisable information hub that has the familiarity of a spreadsheet and document with the utility of a database, providing the following:

- familiar and flexibility of spreadsheets with power of a database
- data-driven documents
- forms and tables to collect data
- integrations with construction software like Viewpoint, Autodesk construction cloud, Acconex, Revizto, Asite, Sharepoint, Revit, PowerAutomate, PowerBI,
- ask Morta AI & search
- data quality checks using in-cell validation
- open API
- automation services using webhooks and triggers
- relationships between information to connect siloes
- ISO 19650 compliant resources
- Word, Excel and PDF exports

Value Proposition

Despite the existence of 100s of options for construction and asset management software, organisations are currently reliant on manual time-consuming and error-prone Excel based workflows. Morta enables construction professionals to increase productivity by providing them the ability to build hubs that connect their information, systems and teams together using tools that have the familiarity of spreadsheets and documents combined with the power and control of databases. This has led early adopters such as the Ministry of Justice, Manchester Foundation Trust and the Centre for Digital Built Britain to choose Morta.

- 1) Dedicated to construction and built environment: Morta's team and mission is completely focused on improving outcomes and productivity in the construction industry.
- 2) Customisable: You can customise processes and tables to meet the precise needs of your process. In this case, this means we can replicate the existing business logic available to you in Excel.
- 3) Data-centric: Organisations can collect data, verify the quality of data, and analyse data. Organisations that use Morta increase their data quality and integrity through verification features.
- 4) Open and connected: We believe in a future where organisations can pull and push the data needed from any system. Morta users can easily bring together disparate data sets (in one of our projects, we are bringing together 150+ data sets that include field, material, progress and accounting datasets).
- 7) Automation: Morta understands that teams currently have to complete manual tasks that range from re-entering data to performing calculations and notifying people by email. Morta enables organisations to automate laborious workflows to decrease risk and process cycle time.
- 8) Secure: Morta's tag-based permissions enables organisations to control who can view, submit, review and approve information. This allows us to have 60+ companies working on the same data sets in real-time without worrying that they can each view each other's data.
- 9) Compliant: Morta complies with all the key security requirements (Cyber Essentials certified and working towards ISO 27001) and is aligned to existing standards in the built environment for information management such as ISO 19650.

Our Clients

Morta works with asset owners, developers, contractors, and organisations across the built environment supply chain. Sample projects include:



Ministry
of Justice

digitising specifications for the estate and creating its information management platform for the New Prisons Programme.



used to demonstrate the 'Smart Standards' concept for ISO 19650 in and was used to deliver the information requirements tool.



MADISON SQUARE GARDEN
ENTERTAINMENT

using Morta to automate payment application verification and interface with 30+ contractors.



Manchester University
NHS Foundation Trust

automating the verification of handover information and connecting information across its estate and capital projects.

Our Team

Morta has a team with a diverse skillset, bringing together deep construction expertise along with software development. Our team of digital transformation specialists have a level of expertise in construction projects, understand information management (eg. ISO19650), project management, controls, commercial management, and planning related processes along with construction specific file formats such as IFC, Revit, and COBie. This is further demonstrated through our work with organisations such as contributors to the UK BIM Framework, UK BIM Alliance Technology Members, and partners to the construction innovation hub and centre for digital built Britain.

Social Value

Morta is committed to being an equal opportunity employer that is on a mission to increasing productivity and resilience for the built environment. By enabling organisations and supply chains to digitise, Morta aims to support in building back better and the Covid-19 Recovery.

Moreover, Morta aims to support the fight against climate change and is actively getting involved in community driven efforts such as 'Zero' and support various Sustainability related processes and analysis. Morta aims to be Net Zero by 2030 and plans on becoming a B-corp in the coming few months.

To help drive the industry forward, Morta is committed to providing free to use tools that add value to users, including the Information Requirements tool developed in a project with the Centre for Digital Built Britain and funded by the Construction Innovation Hub.

Overview of the G-Cloud Service

Morta Capabilities and Services

Morta is a cloud-based solution that allows users to create smart and connected tables and documents to replace disconnected word and excel files. Morta's open API allows users to connect to external data sources and to automate manual workflows. Morta's platform is offered with the following sets of capabilities and core-products.

Category	Description
Core Platform	
Tables	Tabular resources consisting of columns and rows that would've typically been spreadsheets.
Processes	This allows organisations to replace information that would've otherwise existed in a word document
Views	Filtered versions of tables or form-based view
Attachments	Attach files (25Mb file limit)
Webhooks	Automate repetitive tasks based on trigger events (limited by credits)
Scripts	Perform complex calculations in real-time
Cell validation	Automatically validate collected data based on rules
API	Pull data you need from Morta to other systems
Comments	Comment on each other's contributions
Interoperability	Export to CSV, DOCX, PDF and JSON
Administration and Security	
Single Sign-On	Manage member onboarding with secure single sign-on using the

	provider of your choice.
Audit Logs	Detailed log of events that occurred on the platform across users maintained over a 5-year period
Permissions	User and tag based permissions to create, read, update and delete data
Data retention	Mirror data to a repository on an agreed frequency.
Use cases and integrations	
Use Cases (measured by Automation Events or billable users)	Project Management, Cost Management, Contractor Management, Facility Management, Information Management, Design Guidance and Specifications Authoring, Design Management, Procurement Planning and Management, Sustainability Management, and custom available upon request.
Integrations & Connectors	Autodesk BIM 360 and Construction Cloud, ASite, Viewpoint, Autodesk Revit, Acconex, Revizto, Solibri, Power Automate, Power BI
Professional and consulting services	
Consulting services	Morta offers services to support the organisation in digitalising, connecting and automating processes using the Morta platform.

Users

Morta offers a user-based subscription. There are 5 different types of users:

- Viewer: Can view all resources on the platform
- Commenter: Can comment on all resources on the platform
- Contributor: Can contribute to projects via forms, tables and processes.
- Creator and editor: Can create or edit resources
- Project Owner: Owns the project

2. Security, Data Ownership and Permissions

Security and compliance are top priorities for Morta because they are fundamental to your experience with the product. Morta is committed to securing your data, eliminating systems vulnerability, and ensuring continuity of access. The below provides a high-level summary of Morta's approach to security and data protection.

Access Permissions: Morta will provide provision for the client to onboard an unlimited number of users and administrators. The client can set the limit of the number of administrators to 5 individuals. Users ought to be pre-approved by the appropriate members of the client team. Administrators can only be added with the acceptance of a designated individual. Morta will provide provision for the client to onboard users through using a Single Sign-On provider (e.g. Okta).

Solution Hosting: The Morta web application and database infrastructure hosted on the Google Cloud Platform, with the servers located in region Europe-West-2 (London, UK). This service is ISO 27001 certified and has a guaranteed uptime (contained with its Service Level Agreement) of at least 99.95%. Most modern web applications are hosted on cloud servers, given their enhanced security and performance compared to alternatives.

Service Level Agreements: In line with the SLA of our cloud provider, Morta will provide a monthly uptime percentage of at least 99.95%. Morta displays all uptime records for each of its services at <https://morta.statuspage.io/>.

Security: Security and compliance are top priorities for Morta because they are fundamental to your experience with the product. Morta is committed to securing your data, eliminating systems vulnerability, and ensuring continuity of access. Morta uses a variety of industry-standard technologies and services to secure your data from unauthorized access, disclosure, use, and loss. Security is directed by Morta's Chief Technology Officer and maintained by Morta's Engineering team. We have received the UK government-backed Cyber Essentials certification (which can be found [here](#)) which demonstrates that we have ensured our systems are not vulnerable to a number of cyberattacks. This certification makes us eligible to bid for central government contracts which involve handling sensitive and personal information or the provision of certain technical products and services. Additionally, Morta is working towards ISO 27001 Information Security Management certification.

Data Retention: Morta keeps hourly, daily and weekly encrypted backups of data with another cloud provider, AWS, in a London based datacenter. We split our

backups between providers to mitigate the risk of one provider/one datacenter being compromised and being able to use backups from another provider. While never expected, in the case of production data loss (i.e. primary data stores lost), we will restore organizational data from these backups. In the event of a region-wide outage, Morta will bring up a duplicate environment in a different Google Cloud Platform region. Morta will enable the capability for the client to mirror data onto the client repository environment (e.g. Azure) on an agreed frequency, in a format capable of being processed and analysed at an additional cost.

Data Protection Policy: Our data protection policy describes how personal data must be collected, handled and stored to meet the company's data protection standards - and to comply with the law. The objective of this Information Security Policy is to help preserve the confidentiality, integrity and availability of our information, based on a risk assessment and an understanding of our tolerance for risk.

Business continuity and exit arrangements: Morta allows users to download data into transferable formats (including CSV, DOCX etc). Furthermore, all data is consumable through the API and backups can be made by customers using the API service. Furthermore, Morta will enable the capability for the client to mirror data onto the client repository environment (e.g. Azure) on an agreed frequency.

Data Encryption: All data in Morta servers is encrypted at rest. Google Cloud Platform stores and manages data cryptography keys in its redundant and globally distributed Key Management Service. So, if an intruder were ever able to access any of the physical storage devices, the Morta data contained therein would still be impossible to decrypt without the keys, rendering the information a useless jumble of random characters. Encryption at rest also enables continuity measures like backup and infrastructure management without compromising data security and privacy. Morta exclusively sends data over HTTPS transport layer security (TLS) encrypted connections for additional security as data transits to and from the application.

Interoperability: Morta ensures the availability of data in an open and accessible format at all times through CSV and JSON exports available on demand.

Data Removal: All customer data stored on Morta servers is eradicated upon a customer's termination of service and deletion of account after a 24-hour waiting

period to prevent accidental cancellation. Data can also be deleted upon request and via Morta's REST API and UI.

Intellectual Property: Data created and collected on the Morta platform is deemed to be the intellectual property of the buyer. Bespoke modules created for the buyer are deemed to be the property of the buyer. Morta will make provisions to provide a copy of the code behind the automation services created as part of the acceptance process.

3. Using the Service

Commercials

Ordering and Invoicing

To discuss requirements the buyer can email mo@morta.io to arrange for a call whereby one of Morta's specialists will help you determine your requirements and needs. An order can then be placed by filling in an online form that is submitted to Morta or receiving a PO by e-mail.

Subscription related costs are invoiced in advance of the license provided on a yearly or quarterly basis. Invoices are expected to be paid within a month of invoicing.

Pricing Overview

Organisations can subscribe to Morta by identifying a number of paid users for an advanced subscription.

Availability of Trial Service

Morta offers a 30 day trial for the platform.

Termination

For termination and off-boarding, Morta expects 30-day notice. Following termination, Morta will enable the user to view data but will remove the ability to edit or change data or invite any additional users. Should the buyer require Morta's support, that will be charged at Morta's quoted daily rate.

Service onboarding, provision, support, after-sales account management

Onboarding:

- 1 hour private demo of the platform.
- Access to tutorials and videos in community helpdesk

Support:

- E-mail and video conferencing based support. Morta will assign a priority to the issue and handle as detailed below.
- Support in usage of Morta's templates.
- Support in implementing off-the shelf integrations.
- Access to Morta's private library of processes, integrations and dashboards

Training:

- Access to Morta's community and community events/webinars for upskilling and training.
- 1-on-1 and private sessions subject to fair use.

Support parameters

All support typically takes place during business hours (9:00AM till 6:00PM). Should there be urgent requirements outside of business hours, Morta will handle that on a case-by-case basis. Support is typically limited to online meetings or e-mail based support.

Service Levels, Maintenance and Support

System Availability

In line with the SLA of our cloud provider, Morta will provide a monthly uptime percentage of at least 99.95%, excluding planned down time for system maintenance and updates. Morta displays all uptime records for each of its services at <https://morta.statuspage.io/>.

Support Request Prioritisation

The Morta team will assign one of the priorities below to each request:

- Priority1: a business-critical feature of the software service is unavailable to all users, and consequently users are unable to continue their normal course of business.
- Priority 2: an important feature is unavailable to all users, which is significant inconvenience, however does not prevent users from continuing with their normal course of business
- Priority 3: a feature of the software service is unavailable to one or more users
- Priority 4: a feature of the software service is either unavailable or not performing as it should, but is causing minimal business impact.

The support request shall be escalated in the event that the customer does not agree with the prioritisation of the support request assigned by the support team.

Support response and resolution times

Morta understands that its solution can be at the core of business operations and will always endeavour to resolve issues in a timely manner. Morta's target response and resolution times are listed below:

Priority	Response time	Resolution time
Priority 1	2 hour	4 hours
Priority 2	1 hour	8 hours

Priority 3	2 hours	48 hours
Priority 4	4 hours	5 days

Software as a Service Maintenance

Software patches and upgrades are provided free of charge and carried out by Morta during planned maintenance windows. The majority of maintenance activities shall not affect the availability of the service, however, in the event that scheduled maintenance will incur an interruption to the service, then customers shall be notified in advance and an agreed date for maintenance scheduled.

Scheduled maintenance windows are between 8pm and midnight.

Error Logging

Morta has a completely automated error logging system. All errors are logged and support engineers are notified by email. Errors are logged, prioritised and resolved accordingly.

Service Status Monitoring & Reporting

Automated alerts notify Senior Support Engineers of server issues. All issues are logged and tracked to resolution. At a frequency to be agreed with the Customer and subject to contract, Morta shall provide a Service Report including:

- Performance against SLA
- Unplanned server downtime occurrences
- Use of Morta Technology Ltd Support Services
- Disk usage

Software customisation

No two customers are the same. As a result, Morta has been designed to be highly configurable. The Plan of Work module allows for any asset data schema to be configured to suit project requirements. Any number of model disciplines can be also configured. This design should minimise the amount of custom development requested by Customers. However, Morta provides full design, development and implementation services for bespoke customisation requests for software enhancements, third party app integration, and completely separate Customer projects.

Financial Recompense Model for not Meeting Service Levels

Quarterly services uptime metric	Rating	Automation credits ¹ returned
100% - 99.50%	Satisfactory	0%
99.50% - 99.0%	Tolerable	10%
98.00% - 96.5%	Intolerable	25%
< 96.5%	Completely intolerable	100%

4. Provision of the Service

Customer Responsibilities

The client is responsible for using the system appropriately and correctly to ensure safety.

Technical Requirements and Client-Side Requirements

The system requires internet/network connectivity and the use of Microsoft Edge or Google Chrome browsers. The system has no specific requirements for hardware, storage or operating systems.

5. Contact Details

Morta contacts for all enquiries is:

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¹ As defined in the Automation Events section of the document.