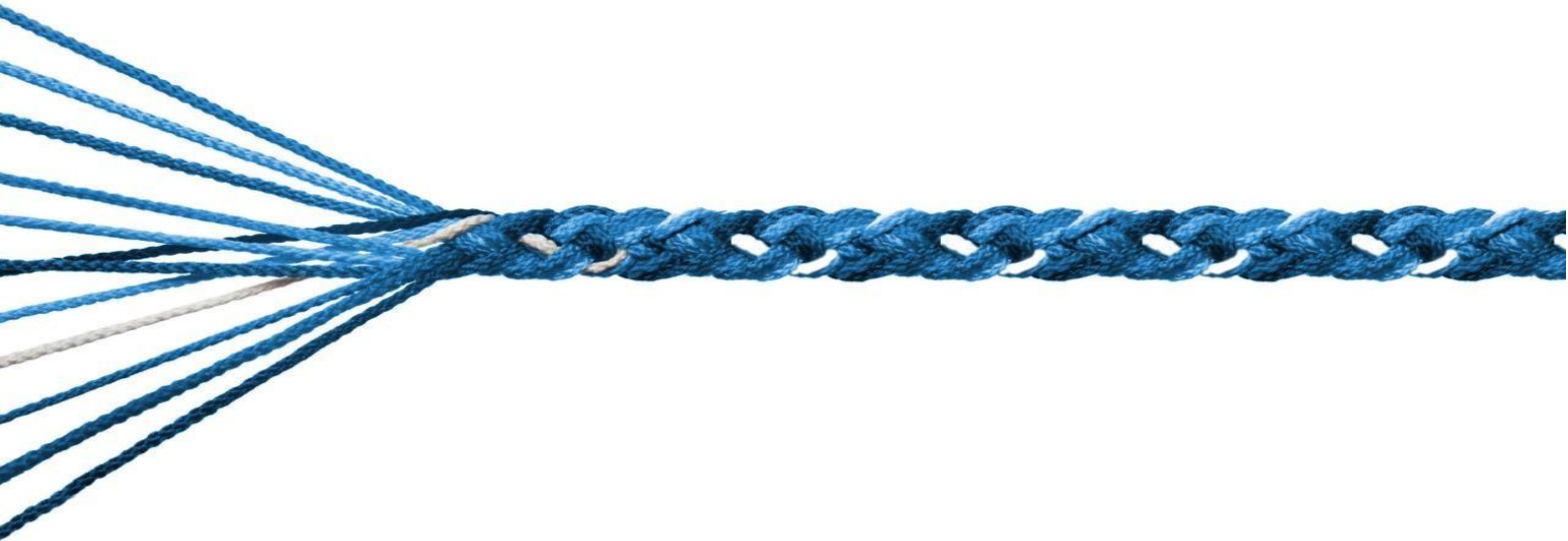




Service Definition

Engage – Citizen Engagement Solution (Web Agent)

September 2026

Commercial in confidence

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Introduction

Service Description

Engage provides citizen engagement solutions, as an AI-enabled webchat service for public-sector organisations. It provides an organisation-wide chatbot across an agreed public website/domain, answering citizen queries using organisation provided content and guided flows.

Key features include:

- Hybrid interaction flows, combining guided, fixed responses with AI-assisted free-text handling.
- Organisation-wide deployment across an agreed public website/domain.
- Managed website ingestion from public HTML pages.
- Scheduled knowledge refresh (cadence dependent on tier).
- Analytics dashboard.
- Optional internal document "Knowledge Packs" for PDFs/policies supplied by the customer (if included as an optional add-on).
- Optional live agent hand-off (if included as an optional add-on).
- Optional additional domains and integrations (scoped separately).
- Optional integration to third-party systems.
- Usage-based message bundles for demand scaling and seasonal peaks.

Associated Services

Implementation, training services, and professional services for major change requests are scoped and priced separately.

Value Proposition

For citizen-facing organisations, such as local authorities and public bodies, the Engage solution provides a trust-worthy, efficient and knowledgeable channel for citizens to self-serve reducing pressure on customer-facing teams.

Engage provides a secure, reliable, and cost-effective way for public sector organisations to deliver timely, consistent support to citizens. This improves response times and enhances the overall citizen experience.

Engage can be deployed quickly, with supported configuration specifically designed to meet organisational needs, and scaled as demand grows.

The Engage Web Agent provides customers with the following value:

- Delivers faster answers for residents, reducing waiting and improving experience.
- Supports digital channel shift while improving citizen service experience.
- Resolves more queries first-time, reducing repeat contacts .
- Guides residents to the right service so needs are met appropriately.
- Provides consistent, up-to-date information across the organisation's website.

- Handles peak demand and seasonal spikes while maintaining experience.
- Escalates seamlessly to live-agents for complex issues needing intervention.
- Provides insight into citizen needs to drive continuous service improvement.
- Reduces operational effort through website-based knowledge ingestion.
- Controls scope and cost with clear allowances and governed sources.

Managed Services and Security

Engage (Web Agent) is delivered as a managed service by Idox, including configuration management, monitoring and incident handling.

Data Protection Standards and Procedures

Data protection obligations are addressed contractually, including a Data Processing Agreement (DPA) where required. Data may be stored and processed in the United Kingdom, European Economic Area (EEA) and other geographic locations.

Hosting Infrastructure

The Engage platform is hosted within UK based regions that include load balancing and auto scalable instances to meet any demand required.

Data Back-Up and Restoration

Back-up and restoration arrangements are operated by Idox in line with internal policies and contractual requirements.

Business Continuity Statement / Plan

Business continuity arrangements are maintained by Idox and are available on request.

Privacy by Design

The Engage Web Agent solution is designed to support governed knowledge sources and controlled operational processes. The solution is designed to minimise collection of personal data, and to anonymise any personal data not required for processing of enquiries.

Accessing the Service

Ordering and Invoicing

The service is available via the G-Cloud Digital Marketplace using the standard order form and call-off contract.

Pricing Overview

Pricing is provided separately via the Digital Marketplace listing.

On-Boarding

Buyers are supported through onboarding to achieve their requirements, including:

- Agreeing in-scope domain and sources.
- Configuration and testing of fixed flows.
- Initial knowledge ingestion from agreed in-scope sources.
- Go-live support.

Service Management

Buyers have a dedicated Account Manager and access to the Idox Service Desk via the Customer Portal. Throughout the service, buyers receive:

- Supplier-managed configuration and change control.
- Operational monitoring and incident management via Service Desk.

Service Levels

Availability is measured monthly, excluding scheduled maintenance and events outside supplier control, as defined in the SLA.

Service Credits

Service credits (if applicable) are defined in the call-off contract.

Outage and Maintenance Management

Planned maintenance and unplanned incidents are managed through our operational processes and communicated to customers via agreed channels.

Off-Boarding

On termination, we will handle disable the service and handle customer-specific configuration and data extraction in line with contractual and policy requirements. The buyer is responsible for removal of the webchat from their environments.

Customer Responsibilities

To enable Engage Web Agent to operate successfully, the customer is responsible for:

- Providing access to and ownership for the content included in scope.
- Maintaining the accuracy of content on which the service relies.
- Provision of live-agents, where live-agent hand-off is included, to ensure citizens' enquiries can be escalated effectively.
- Collaborating with Idox to review and optimise hybrid flows to ensure resolution of queries is as effective as possible.

Technical Requirements

Client-Side Requirements

- Modern web browser (Edge, Chrome, Safari, Firefox).
- Internet access to hosted Engage service endpoints.
- Ability to add webchat embed snippet to website.
- Access to public website domain(s) for knowledge ingestion.
- Named customer contacts for approvals and change requests.
- Supported device: desktop or mobile, no special hardware.
- Email access for support communications and notifications.
- Access to analytics portal / reports via browser.

Account Management and Ongoing Development

Account management is provided by Idox, all customers have a dedicated Account Manager. Ongoing development is managed through our product lifecycle and change control.

Development Lifecycle of the Solution

Engage (IVR) is built using Infrastructure as Code, therefore infrastructure and software updates are both subject to our release pipeline and procedures. Code and built containers are scanned for potential security issues prior to deployment to the Production environment (per release). We also carry out regular code level scans to identify newly discovered vulnerabilities and emerging threats.

IDS/IPS and system monitoring are in place. Patches are deployed in line with our patch management policy and CE+/ISO27001; for example, critical vulnerabilities must be patched in no more than 14 days.

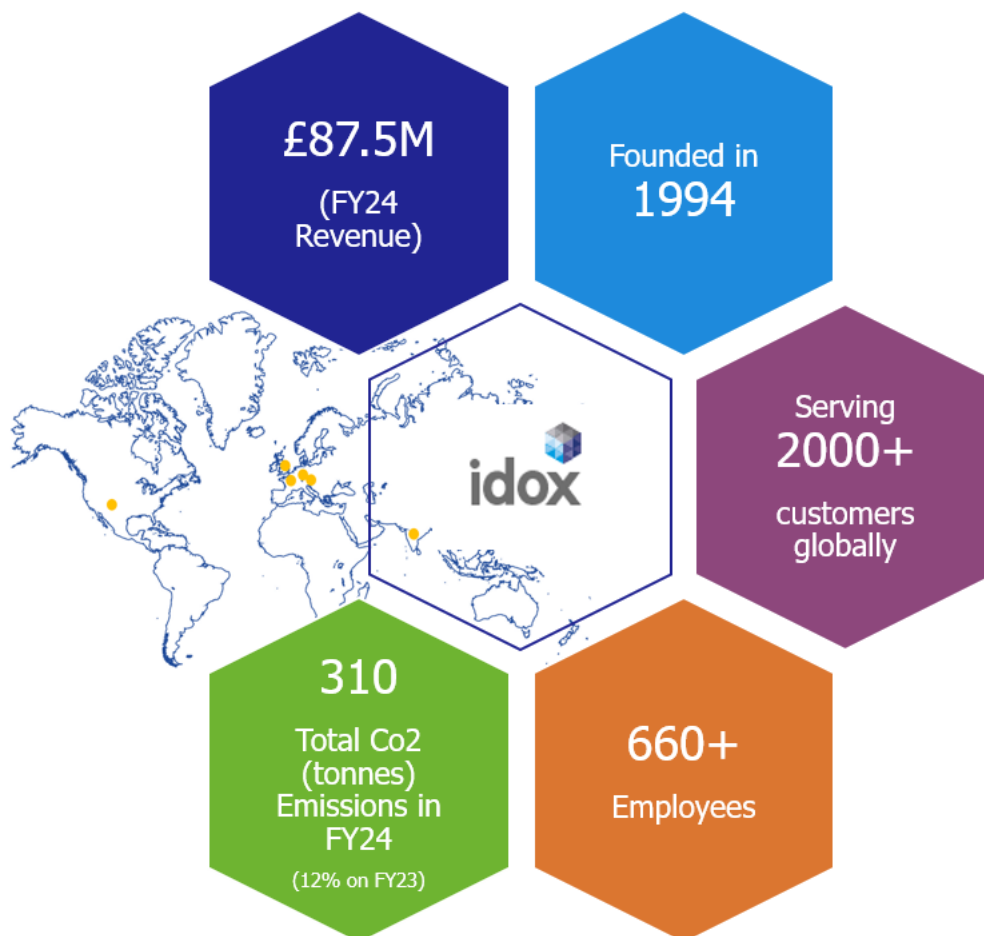
About Idox

As a UK based organisation with a long and enduring history supporting government in the UK and around the world, we design the smart digital solutions that help public sector organisations work better, stay compliant, and engage more effectively with citizens.

Our platforms are secure, scalable, and built to meet UK government standards. They support accessibility and strong data protection, following GDPR and ISO-certified processes. This means organisations can modernise services, optimise costs, and deliver better outcomes for their communities.

We make it easy for public sector teams to access our full range of services (cloud software, and support) through the Digital Marketplace. This streamlined approach saves time and removes the complexity of traditional procurement.

With a strong presence across the UK and over 650 colleagues, we are a trusted partner for digital transformation, bringing proven expertise, reliable technology, and a commitment to helping organisations achieve their goals. Whether it's improving efficiency, meeting regulatory requirements, or creating better experiences for citizens, we are here to empower you to *do more*.



About Engage

Engage (Web Agent) forms part of the Idox Engage citizen engagement solution.

Social Value

We are dedicated to running a business that both helps our customers do more and is good for everyone, our customers, our employees, and the world around us.

Here's how we make a positive impact:

- **Helping communities and the environment:** Our software makes government services better, from planning to health care, making life easier for people and looking after the environment.
- **Investing locally:** We give back to local communities through donations and we support local charities with our MyFunding Central platform which provides smaller local charities and voluntary organisations with free access to thousands of grants and social investment opportunities from local, national, and international funding sources.
- **Supporting local charities:** We help our customers give back to their communities by supporting local charities. Our employees also get involved through volunteering to support local communities and charity projects.
- **Protecting the environment:** We're already a naturally low emission business but we've committed to further reducing our carbon footprint, aiming to be carbon neutral by 2040. We cut down on energy use, limit travel, promote eco-friendly practices and have adopted the three scopes of the Greenhouse Gas Protocol (GHG) across our business.
- **Doing the right thing:** We believe in fairness and respect for everyone. Our workplaces are inclusive and safe, with fair pay and opportunities for growth and we prioritise diversity, employee well-being, and security in everything we do. Our employees benefit from our extensive range of employee benefits and family friendly working policies as well as leadership training and employee advocacy groups such as Idox Elevate, Pride@Idox, Neurodiversity@Idox, and Workplace Wellbeing.
- **Meeting standards:** We hold ourselves to high standards, with certifications like ISO27001 and ISO14001. We're committed to ethical business practices, including no tolerance for slavery in our supply chain, and prompt payment to suppliers either in line with Public Procurement Contract Regulations 2015 and its amendments or within 45 days.



Case Studies

Case studies are available on request.

Contact us

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