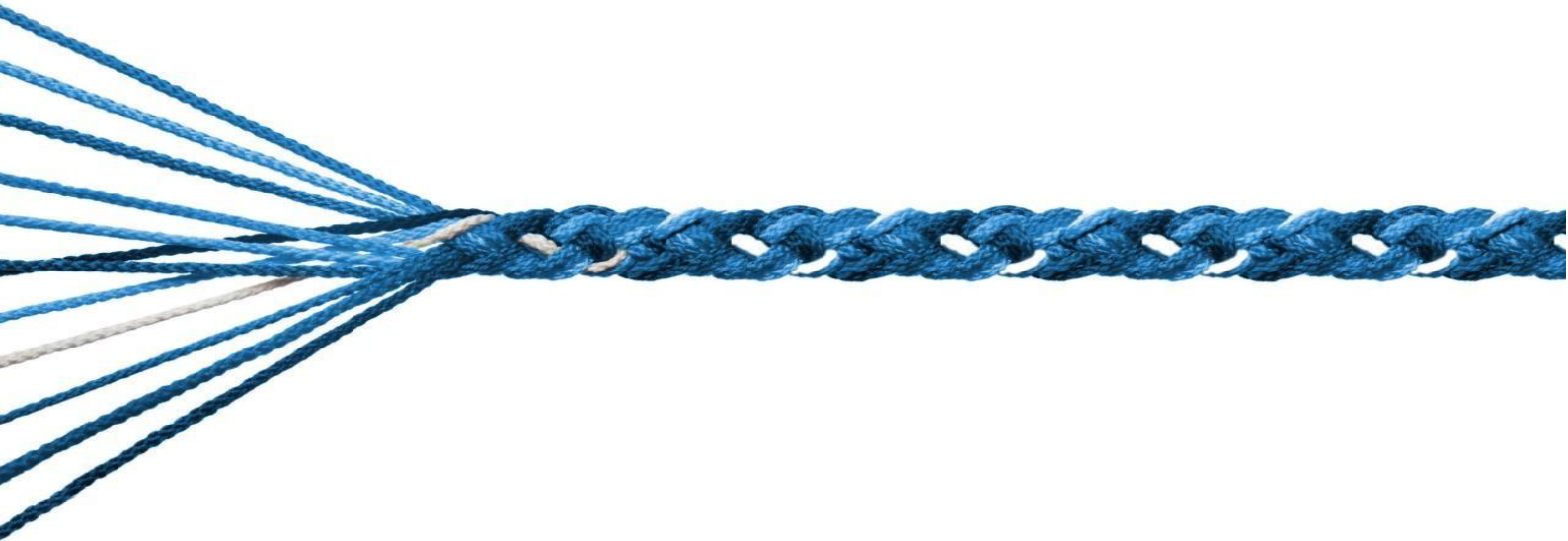




CAFM Explorer - Estates and Facilities Management

Service Definition

September 2026

Commercial in confidence

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Introduction

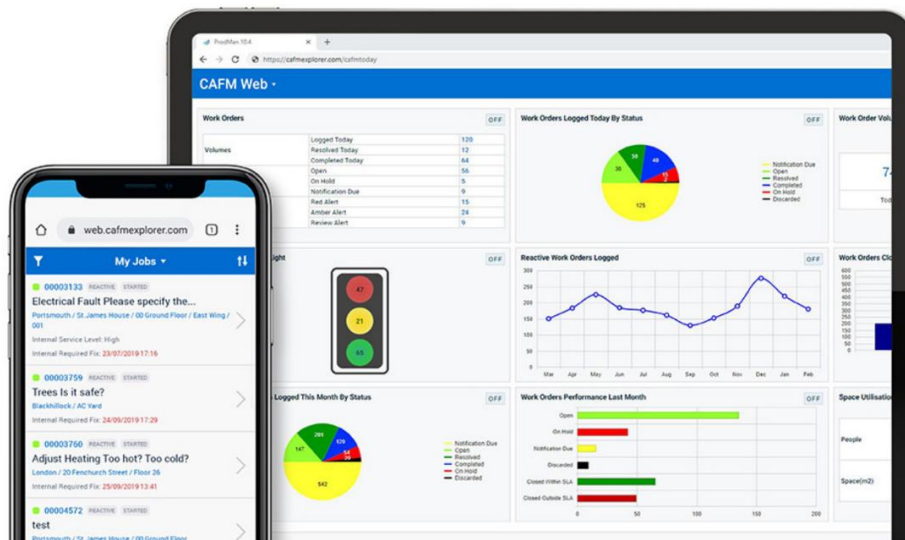
Service Description

CAFM Explorer provides a total facilities management solution with a comprehensive range of modules in one package, with no hidden extra costs or need to purchase additional functionality. The intelligent integration of modules supports automation of manual tasks, drives efficiency, and enables real-time reporting.

CAFM Explorer - Software Built on Insight

CAFM Explorer facilities management software is built by industry experts, all of whom have a proven track record of serving government and the public sector. Our software is proven to increase operational efficiency for our customers, maximising cost and time efficiency.

The solution is fully web-based and provides complete visibility of all assets, costs and risks, anytime, anywhere on a desktop or mobile device.



CAFM Explorer enables Facilities Managers and their teams to manage the following:

- Reactive Helpdesks
- Preventive Planned Maintenance (PPM)
- Risk Assessments
- Compliance
- Mobile Workforce
- Property Portfolios
- Real Estate
- Asset Management and Maintenance
- Cost Control
- Resource and Room Booking.

CAFM Explorer is an Enterprise Solution that includes all functionality required to manage facilities within one CAFM system (Computer Aided Facilities Management) and/or IWMS (Integrated Workplace Management System). Key features include:

- **Maintenance:** PPM planned Maintenance, Reactive Helpdesk and Compliance.
- **Asset Management:** Full lifecycle management, cost planning, reporting, barcode scanning.
- **Notifications:** Including automatic notifications, monitoring and health and safety information alerts.
- **Compliance Management:** Monitoring, planning and scheduling of planning activities.
- **Mobile Access:** Including full visibility of risks, documentation, and history.
- **Dashboards:** Monitoring works, key SLA reports, KPIs and full auditability.
- **Document Control:** Expiry, notification and tracking of key documents.
- **Property Management:** Lease, tenure, break tracking, notifications, and reminders.
- **Cost Control:** Operation costs, budget assignment, full visibility, and forecasting.

Why CAFM Explorer?

When choosing CAFM Explorer our customers realise the following key benefits:

- **Return On Investment (ROI):** Financial savings, extended asset life, reduced service downtime.
- **Improved Risk Management:** Compliance monitoring, dynamic risk assessments, checklists, audit trail.
- **Improved Decision Making:** Access to real-time information.
- **Increased Efficiency:** Streamlining of processes, better utilisation of resources.
- **A Single Source of Truth:** Central source for all information.
- **Maximised Operational Efficiency:** Best utilisation of resources, scheduling etc.
- **Contractor Management:** SLA Monitoring, Contract reminders.
- **Accurate Forecasting:** Budget preparation based on full cost analysis etc.
- **Business Process Support:** A solution driven by facilities professionals.

Our CAFM Explorer team boasts over 35 years' experience of successful delivery of CAFM solutions across all industry sectors.

Value Proposition

CAFM Explorer has been successfully deployed throughout the Public Sector for over 25 years. With this easy-to-use software our customers streamline their facilities operations, gaining valuable insight into their assets, costs and risks, supported by equipment tracking capabilities and automated task assignments. These features simply transform the way that organisations work leading to real productivity gains.

Our solution offers a comprehensive solution for all facilities management requirements including managing physical environments, lease agreements and tracking physical impacts.

Managed Services and Security

Data Protection Standards and Procedures

We are committed to high standards of information security, data protection, privacy and transparency and our systems and processes are compliant with applicable GDPR regulations. As a data processor, we place a high priority on protecting and managing data in accordance with accepted standards including our certified ISO 27001 Information Security Management System (ISMS), Cyber Essentials and Cyber Essentials plus certifications.



Hosting Infrastructure

All customer data is hosted in a Tier 3 UK Data Centre, which complies with EU standards for Data Protection including any Disaster Recovery location. All data remains in the UK. Our data centre is audited and accredited to the following standards:

- ISO 9001
- ISO 14001
- ISO 27001

The hosting centre is dedicated to Idox Software products only. All clients have separate containers for their individual systems.

Data Back-Up and Restoration

The proposed infrastructure for both the server architecture and hosting environment is designed for high availability and resilience therefore any disaster situation is likely to be as a result of force majeure.

In the event of a catastrophic failure of the data centre, we will ensure all systems are available using an alternative Tier 1 environment.

The solution will feature a fully automated backup of customer data including offsite replication and retention of the data in compliance with standard data protection and security requirements. As standard our back-up routine is typically as follows:

- Backups are made every 24 hours.
- These system backups are part of the service.
- Backup is provided by a second UK based data centre.

A Disaster Recovery plan is in place.

Business Continuity Statement / Plan

Our Business Continuity Plan (BCP) provides a course of action for the assessment of a significant disruption to the business and for the continuation of the business following such an event. In accordance our ISO22301:2019 certification, our BCP meets the requirements to plan, establish, implement, operate, monitor, review, maintain and continually improve our documented management system to protect against and reduce the likelihood of incident occurrence and to prepare for and respond to incidents when they arise.

Privacy by Design

We recognise that information security is important in the development and implementation of all systems we deliver. To ensure a consistent and effective approach, we operate an externally audited and certified, organisation wide Information Security Management System (Security Management Plan) which implements and enforces controls on all business functions. The system and controls are also externally verified and certified annually as part of our ISO 27001 certification process. Risks raised through internal and external audits are reviewed at management meetings by the information security manager, the appropriate head of business and a board representative.

We employ regular vulnerability management scans with inbuilt processes to identify and rectify areas of concern.

Additionally, monitoring tools are used to measure server performance metrics as well as storage and network/bandwidth utilisation and unusual server/network/perimeter activity. The alerts from these systems are actively monitored and reviewed and any potential intrusion attempt is raised in line with our security incident reporting procedure for further investigation.

Accessing the Service

Ordering and Invoicing

The order will be completed by return of the signed G-Cloud contract and invoicing will be issued as per the schedule set out in the contract.

Pricing Overview

Please see our associated pricing document.

On-Boarding

As well as the software itself, we can provide a range of additional, complementary services to help with the onboarding of users. This includes the provision of training, Project Management of the implementation process, consultancy to assist with process design and configuration, and if required, data migration services. We provide 100% of these services directly, we do not use sub-contractors.

Depending on the key project drivers the project process will be customised to meet the client's exact requirements and will typically cover the following:

- System specification
- Process design
- Data build
- Training
- Go Live Support

We will appoint a dedicated solution delivery team for the duration of the Project Implementation. The team will deliver the project according to PRINCE2 based techniques (scaled to the size of the project to ensure the project is broken down into predictable and manageable tasks for all stakeholders. We follow a critical development path with respect to the prioritisation of resources.

Key tasks we will deliver as part of the project include:

- Provide **a comprehensive project plan with agreed milestones, a risk register and issue log**. The project plan will be actively maintained and used as a measure to monitor progress towards the deadlines set within it.
- **Manage the overall project**, including client and team management, to ensure a compliant solution is delivered to plan. We will endeavour to utilise customer staff in an efficient manner avoiding any duplication of effort.
- **Lead the overall design and technical implementation**, including assuring quality, compliance and integration to deliver a solution for customer approval.
- **Manage the data migration (if required)** from existing systems.
- **Provide user and stakeholder management and liaison**, ensuring that the wider set of activities beyond just system implementation are managed, enabling better project engagement to meet programme timelines.

Training

Instructor led training will be delivered across all areas of the system. As standard, an expert instructor will deliver these workshops remotely over MS Teams and training sessions will be split according to each user-group's defined role to ensure each session is relevant and engaging for users based on the outcome of a Trading Needs Analysis (that will identify

different user types and abilities). All training documentation and material will be provided and options exist for on-site delivery if required.

Service Management

Application and Technical Support

Under the terms of the annual subscription agreement, technical support is provided by our Service Desk. The Service Desk is operational from 08.00 to 18.00. Monday to Friday, excluding England and Wales Public & Bank Holidays.

Support Requests can be logged 24/7 via our customer portal or email and by phone during the service hours. More information can be provided on request regarding our response and fix times.

Service Levels

The solution is accessible 24/7 subject to system maintenance or upgrading a customer's system to a later version – any downtime will be agreed in advance with the customer.

We guarantee 98% availability per 30-day period.

Service Credits

We do not agree to service credit agreements as part of our standard package however specific requirements can be discussed.

Outage and Maintenance Management

The annual subscription agreement also provides ongoing maintenance of the solution - this includes all system patches, updates and upgrades as part of the managed service provision and this will require no downtime. The expected regularity of this work will be in line with customer and business needs and not undertaken without prior agreement from the customer.

Enhancements to our core back-office systems are provided within the terms of the annual subscription agreement for no additional charge - this includes legislative changes.

Off-Boarding

Contract termination will be as detailed in the G-Cloud contract.

We will provide an "Exit Plan" should a customer wish to terminate the contract. At all times all the data within CAFM Explorer is accessible to the customer and can be exported without supplier input into CSV or Excel format.

Customer Responsibilities

To ensure the solution is configured in such a way that it will support the customer's business for years to come we recommend the following resources are made available during the project on the customer side.

- **Senior Responsible Owner:** As a member of the Project Board, they provide the senior oversight that is key to success, setting the strategic direction for the essential project outcomes and supporting swift decision making around escalations, project changes and configuration.
- **Project Manager (PM):** A dedicated Project Manager to work with their Idox counterpart throughout project delivery. They will be responsible for the day-to-day management of the customers team and act as the escalation point for issues and risks on the customer side.
- **IT Lead:** IT experts with a deep understanding of the customer's internal architecture / network.
- **IT Practitioners:** Individuals who may occupy multiple roles depending on skillset and trust's structure.
- **Super-Users:** Super-Users must have regular involvement in the project including the opportunity to explore the system as it evolves and understand the configured processes. These users will become system champions who will cascade training to end users as per the agreed timings in the project plan.

Following transition to Business-as-Usual (BAU) the service will move to our support model. To ensure that we can deal with support requests as effectively as possible we require our customers to:

- **Ensure users are trained to use the software** and that only suitably qualified staff log support requests to the Idox Service Desk.
- **Provide as much detail as possible relating to support requests.** This should include the software version, steps to replicate the issue, detail of the issue and/or screenshots as appropriate.
- **Ensure relevant staff are available to discuss the request** as needed and who can provide details of others within the organisation who are also familiar with the nature of the issue.

Technical Requirements

Client-Side Requirements

As a web-based application users simply require a reliable internet connection to access the system, on a device running a mainstream web-browser. The CAFM Web and CAFM mobile components of the solution support access and delivery on mobile devices, thus supporting remote and onsite working.

The application runs on a variety of platforms such as Windows XP+, Mac OS, and mobile devices running iOS and Android.

Account Management and Ongoing Development

We are committed to building a collaborative and lasting relationship with our customers to deliver maximum return on their software investment for years to come.

Therefore, as part of the delivery of this solution, we appoint a dedicated Account Manager who acts as the first point of contact for ongoing contract delivery, improvement, monitoring and management processes. They also handle any specific service issues and meet with their customers at the outset of the relationship and regularly thereafter to understand what is important to their business, their objectives and how they can best support them to achieve maximum return on the investment they have made in our solution.

In addition to the technical support provided by our service desk, we also provide numerous customer engagement channels that may include (subject to change):

- CAFM Explorer User Group
- ideas@idox online customer forum
- User manuals/documentation which are available for download from within the system itself via the 'Help menu'.

Development Lifecycle of the Solution

The size and experience of our Engineering team allow us to adopt the best and most appropriate approach for each product and for the market. We are happy to engage with customers who wish to work with us to steer product development using Agile methodology; equally, we will adopt a Waterfall methodology for customers who prefer this approach.

We see huge overlap with our vast range of products and our continued approach is to share functionality, so that we build once and build for all products. We adopt this microservice approach across the group to develop and build highly professional, well-designed and robust products that benefit all our customers.

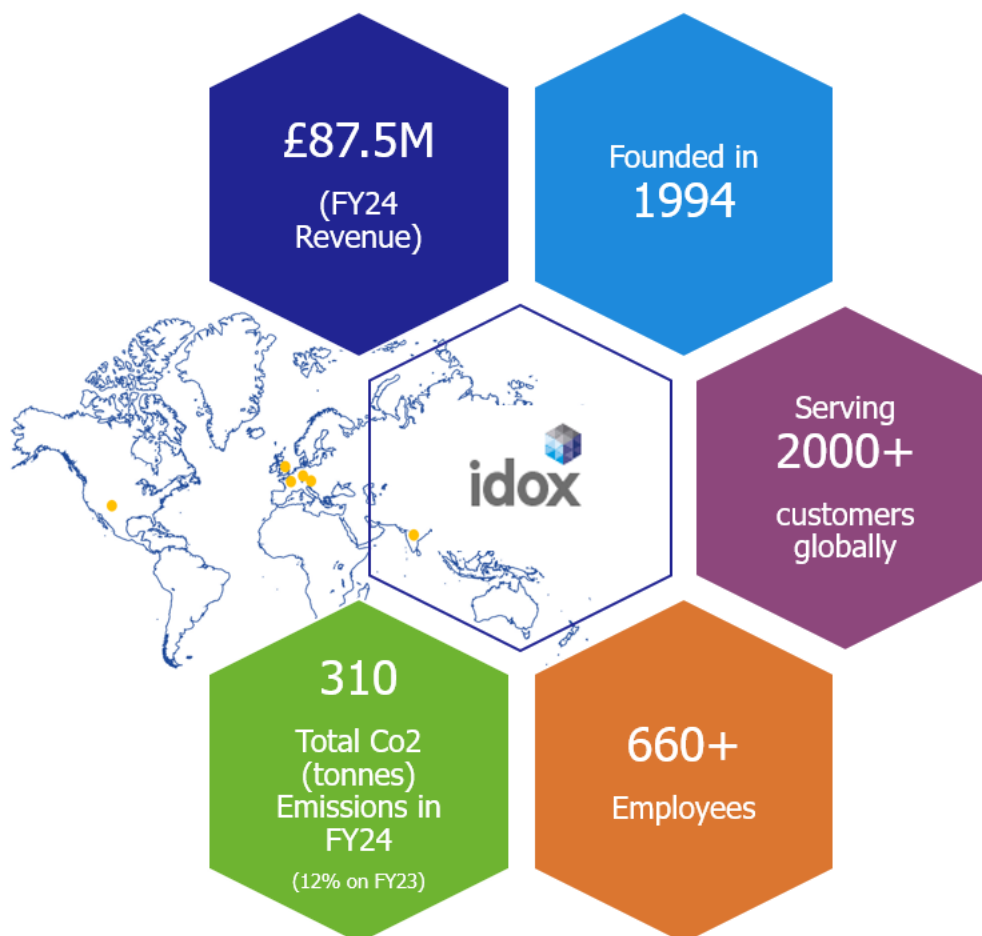
About Idox

Idox is a UK-based company with more than 650 employees working around the world. We design smart digital solutions, powered by AI, to 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, cut costs, and deliver better outcomes for 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, Idox is a trusted partner for digital transformation. We bring 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, Idox is here to enable you to do more.



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 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



CAFM Explorer®

“CAFM Explorer® provides insightful data, real-time tracking, and automatic notifications, which helps us keep on top of SLAs as well as highlight jobs that have crossed SLAs.

Regional Facilities Manager
Affinity Water

 **idox**

CAFM Explorer®

“The CAFM Explorer® software has enabled the facilities staff, as well as academics and students in accommodation, to get the fast, well-coordinated maintenance service they deserve.

Head of Administrative Services in the Estates & Property Services
University of Salford

Idox. Do more.



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