



# **Ideagen EHS – Work Wallet**

Service Definition Document

G-Cloud 15

Lot 2b Software as a Service (SaaS)

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## Company Overview

Ideagen brings clarity and confidence to those businesses that put resilience at the heart of their operations.

Trusted by over 18,000 organisations worldwide – including over 1000 government agencies, more than 2000 hospitals and healthcare settings, as well as education, blue light services, life science and not-for-profit – our AI enabled solutions are proven to keep people, products and processes safe, increase efficiencies and streamline operations.

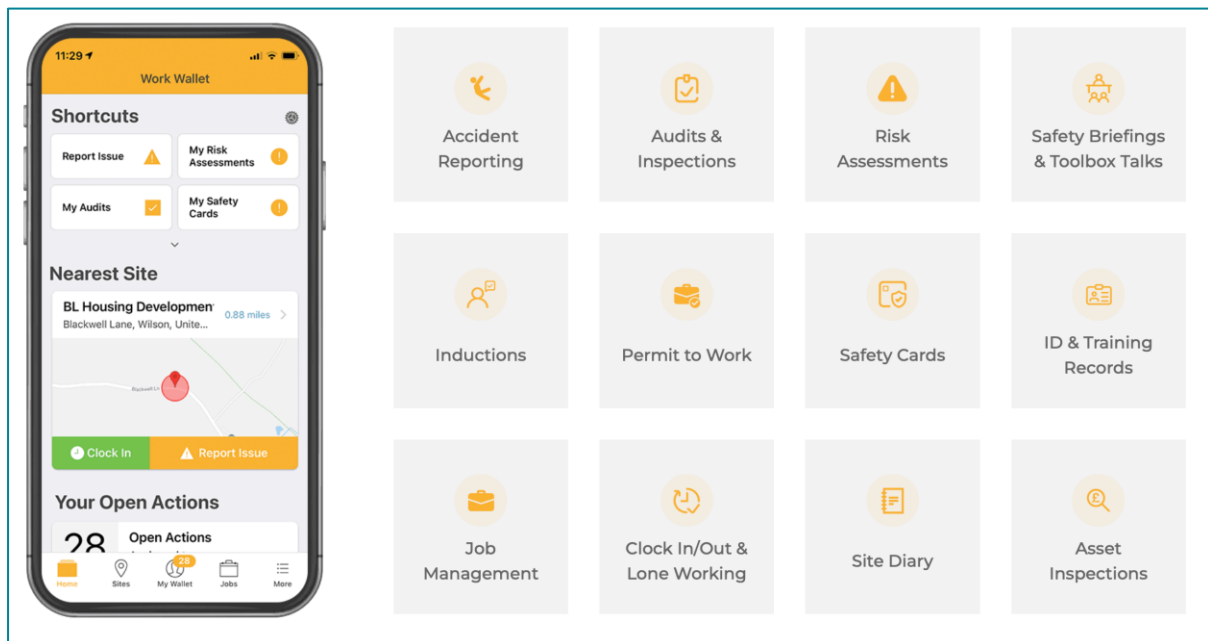
By unifying decades of deep regulatory expertise and innovation with affordable, best-in-class software we provide trusted, meaningful intelligence to support regulated and high-compliance industries with their audit, risk, health and safety, quality and compliance needs.

We are committed to continually improving the quality of our solutions, the environmental impact of our operations, and the security of the information that we safeguard. This commitment is demonstrated by our company certifications to ISO 9001, ISO 14001, ISO 27001 and ISO 45001. Ideagen also follows the guidance provided by ISO 26000.

## Service Overview

### Overview of the Service

Our Ideagen EHS – Work Wallet helps transform Health & Safety Management with our all-in-one SaaS solution. Organisations can easily manage workplace safety and look after their Teams with a full suite of modules including Incident Reporting, Audits, Contractor Management, Inductions, Permit to Work and much more.



## Features and Benefits

The solution provides a system for the end-to-end management of key Health & Safety processes. Ideagen EHS - Work Wallet is a scalable, cloud-based, multi-tenanted application with a clean, intuitive interface that helps you to:

- Evidence compliance with regulations and other safety practices
- Streamline core Health & Safety processes
- Deliver true strategic value to your business

### Accident & Incident Reporting

- User friendly reporting tools encourages worker engagement
- Build your own workflows, categories and processes
- Full investigation tools and action management

### Audits & Inspections

- Easily capture Audit data, online or offline
- Easily build your own Audit Types and Workflows
- Supporting AI services to help report writing

### Digital Inductions

- Create site specific or companywide Inductions

- Supports custom content, competency capture, test questions and other information
- Enrol workers before they arrive on site or quickly through the kiosk or gateway

## Competency Management for ID, Training & Qualifications

- Create custom Job Role competency requirements
- Automatic monitoring of expiry dates
- Link with other modules for powerful oversight

## Permit to Work

- Fully digitise your Permit workflows and processes
- Manage permit extensions and rejections as needed
- Real-time alerts and monitoring

## Asset Inspections & Management

- Build custom Asset Types and properties
- Fully bespoke Inspections and Schedules
- Easily scan Assets via QR Code or NFC Tags

## Risk Assessments

- Build a central library of Tasks, Hazards, COSHH and Control Methods
- Digital signatures
- Full version control

## Safety Briefings

- Distribute Briefings of any type
- In Person capture of Briefing attendance
- All records stored against an individual worker profile

## Jobs & Contractor Management

- Monitor Contractor company compliance and approved status
- Monitoring of expiry information for both companies and individuals
- Build individual Job packs and requirements

## Safety Cards

- Easily distribute Red / Yellow / Green Cards to monitor safety compliance
- Reporting of contractor company compliance
- Record against linked and integrated worker profiles for greater visibility

## Clock In / Out with Lone Working

- Clock in and out of any location with auto geo fenced clock out monitoring
- Lone Worker Check In functionality available
- Map view of clocked in worker locations

## Site Diary

- See all your safety activity for an individual site in one place
- Automated entries from other connected modules
- Populate each day with custom notes and image records of site conditions

## Integrations

- SSO Connectivity for Entra, Google and OKTA
- Integrations API Service for connection with other systems
- BI API Service to extract and build custom reports in BI systems
- Zapier 3rd Party Software Bridging integration

## Outcomes and Deliverables

Organisations that use Ideagen EHS – Work Wallet can expect to achieve a range of desired outcomes:

- Complete all Health & Safety Management within one system
- Get new users onboard quickly with step-by-step workflows
- Work to a consistent methodology across all units
- Support any legislative framework
- See the cross-unit spread of actions and controls
- Create specific and engaging reports
- Consolidate data from other systems using API technology
- Help to promote transparency, accountability, and safer working practices

## Trial Service

As opposed to Trials, we believe clients get better value from a Proof-of-Concept bespoke demonstrations, where we will use data and methodology as provided by the client, build that into our system, then provide a comprehensive bespoke demonstration of the system to the client with data, and a structure, that resonates with them.

## Technical Requirements

Ideagen EHS – Work Wallet provides 2 core system offerings, our web portal and mobile app for use on the go. The web portal supports most modern desktop web browsers for accessing and managing data. We aim to support a range of OS versions on the mobile app to support a wide user base. Our current support includes iOS & iPadOS 18 – 26 and Android 13 – 16 (As at Jan 2026).

## Hosting Options and Locations

Data is stored in MS Azure, in the UK West – Cardiff region, with the disaster recovery region being UK South – London. All data storage is geo redundant and will never leave the specified regions.

## Data Back-Up and Restoration

Backups are configured through a managed service to support our RTO and RPO requirements. Backups are stored redundantly across multiple facilities and multiple devices within each facility. Importantly, to address regulatory requirements, backup data never leaves the customers nominated region. Data is transferred between locations using TLS 1.2, with automatic encryption of data once it is uploaded using the AES-256 algorithm.

Ideagen maintains a documented Business Continuity and Disaster Recovery (BCDR) plan, tested annually with all findings tracked through to corrective action. Testing scenarios cover critical situations including Availability Zone failures and service disruptions that could impact service availability. Cross-functional Business Teams participate in testing exercises to ensure realistic validation of recovery procedures. Further details are available to Buyers upon request.

## Security

Data security and compliance is a key priority for Ideagen EHS – Work Wallet we work through a range of processes and security policies to ensure that our customer's data is secure and protected at all times.

We host an online Trust Centre (<https://trust.work-wallet.com>) to demonstrate our commitment to cyber security. On our Trust Centre, customers can access Policy information, Certifications, real-time monitoring of key security controls (such as MFA, Encryption and Firewalls) and frequently asked questions about our infosec processes.

Ideagen EHS – Work Wallet is hosted in Microsoft Azure Cloud ISO27001 Datacentres. Microsoft Azure is internationally recognised as a leader in Cloud Datacentre security and in addition to these ISO27001 datacentres, the Ideagen EHS – Work Wallet portal is graded 'A' for security by Qualys SSL Labs with the Ideagen EHS – Work Wallet business Cyber Essentials Plus certified.

## Information Assurance

Ideagen maintains a suite of Corporate Security Policies cover the management of security for both its internal operations as well as the services Ideagen provides to its Buyers, and applicable to all Ideagen Employees as well as any relevant Third Parties and Stakeholders. These policies, which are aligned with the ISO/IEC 27001:2022 standard to which Ideagen is externally Certified, govern all areas of security applicable to the services. All Policies are formally reviewed and

signed off by Management at least annually or on significant change, in line with our ISO 27001 Certification.

Additionally, Ideagen is certified under both Cyber Essentials and Cyber Essentials Plus. A comprehensive overview of Ideagen Policies, Standards, and Procedures, can be supplied upon request.

The information security of the business is currently overseen by our VP Global Cyber Security, who works closely with our IT Teams, our Product Managers and our Group DPO to ensure that all Technical and Organisational Measures are in place and maintained. Ideagen utilises the Microsoft Azure, M365 product suite and AWS cloud services and therefore has the benefit of the Microsoft and Amazon infrastructure and controls.

## Privacy by Design

Ideagen has embedded privacy by design principles throughout its product and development lifecycle, prioritising the protection of User data throughout all processing activities. The service implements core privacy principles including data minimization, purpose limitation, and privacy by default, ensuring Users benefit from the highest privacy settings without additional configuration.

The service employs strong encryption and granular access controls to ensure Buyer Data remains secure. Privacy safeguards are integrated from initial design through to data deletion, with regular privacy reviews conducted as features evolve.

Ideagen has appointed a qualified and certified Data Protection Officer who oversees data protection compliance across the organisation and is registered with the Information Commissioner's Office in the UK.

Full details are available in [Data Protection Policy | Safeguarding your privacy](#)

## Development Life Cycle

Ideagen delivers its software through agile methodologies and has adopted the core principles of the Scrum framework, as defined in the Scrum Guide at Scrum.org, to achieve this.

Ideagen developers follow OWASP guidelines. There are Lead Developers who ensure that our development processes are followed, such as peer reviews, testing against the OWASP top 10, etc.

The Cyber Security Unit (CSU) actively undertake regular penetration testing and vulnerability scans to discover any potential vulnerabilities within Ideagen software.

Our Software Development Lifecycle (SDLC) Document forms part of our ISO 27001 and ISO 9001 Frameworks and is reviewed by the Document Owner and our Risk & Audit Team at least annually or on event of a change.

## Buyer Responsibilities

### Working Together for Success

To ensure you get the most from our Services, we'll need you to designate a primary contact person before we begin. This person will be our go-to for important updates like maintenance notifications and service requests, and should have the authority to handle matters such as data releases, restorations, and configuration changes. Just share their name and email address with us, and we'll make sure they stay informed on everything that matters.

### Your Role in Managing the Solution

To help you maintain control and get the best results from our Software and Services, you'll take care of:

- Managing user security and permissions within the Software
- Setting up and maintaining your user desktops and network access
- Implementing, testing, and configuring your database as your needs evolve

- Providing us with accurate information as outlined in our guidance
- Keeping us updated on any operational changes that might affect the Services
- Creating and configuring user accounts
- Meeting your obligations on time and in line with applicable laws

## Access and Collaboration

To deliver great service, we may occasionally need access to your equipment, information, data, personnel, or systems. We'll always keep our requests reasonable and work around your schedule. If our Team visits your premises, we ask that you help us maintain a safe and secure working environment, we'll do the same if you visit us!

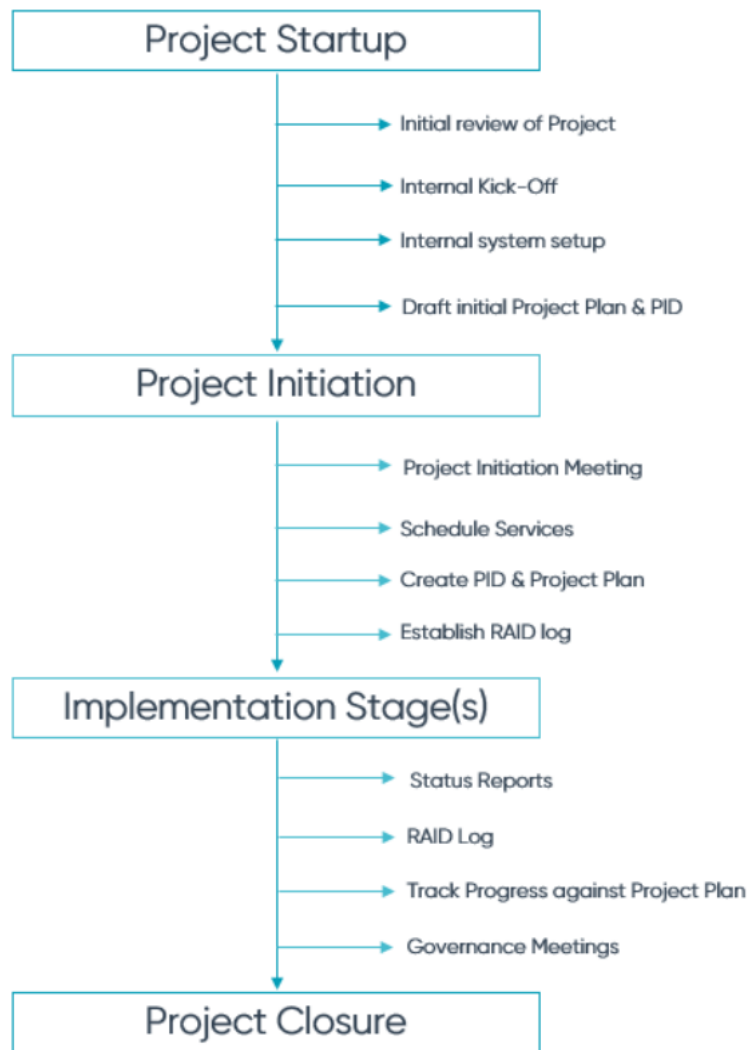
## Onboarding and Offboarding

### Project Management Services

At Ideagen, we work with some of the biggest names across key industries, supporting them to integrate their new software products into their business and acting as a mentor throughout the process. That's why we have a mature, well established Project Management Framework and Prince2 qualified Project Managers to help guide you through the stages of the software delivery process and ensure your requirements are realised.

Our Project Management Services can include an adapted Prince2 Methodology tailored to the most suitable delivery approach for each project. Including a thorough Project Initiation Stage, the provision of core documentation, progress and governance calls, stage boundary processes, extensive reporting and a risk management strategy with a managed RAID log.

There are 4 key stages to the Project Management Approach at Ideagen. They are shown in the chart below.



## Training

Ideagen collaborates closely with Buyers throughout the Implementation Phase, providing a tailored end-to-end "Train the Trainer" approach. Our services include software deployment, user documentation, and e-learning resources. We emphasize the development of clear and measurable learning outcomes, offering consultation to achieve your objectives. Training is conducted by experienced Consultants to ensure effective software adoption aligned with defined learning outcomes.

## Service Constraints

Updates are applied automatically. When an update is released, we schedule the deployment outside office hours for all EU and US customers.

Ideagen EHS always operates on a single live application version across all our customers, so an old version cannot be retained by any Customer.

## Outage and Maintenance Management

From time to time, the Customer will receive notifications, either directly from Ideagen EHS – Work Wallet or through a partner, about Software Upgrades of new versions, service packs and patches along with instructions to apply for the updates.

Upgrades and updates to the products are made available during the period of maintenance cover. Updates are free of charge but there may be charges associated with upgrades.

Ideagen is notified of vulnerabilities through our own internal testing along with independent external assessments and system patch monitoring. Each vulnerability is reviewed to determine if it is applicable to Ideagen's hosting environment and its potential impact. If a zero-day vulnerability is discovered, we will assess its impact to the system and if required patch at the earliest opportunity.

All products are monitored using a managed SIEM/UEBA parsing. If any thresholds are met, alerts are presented via our ticketing system to our Cloud and Cyber Operations Team with automatic escalation procedures. Ideagen operate a formal Incident Management Policy and confidential processes that form part of our ISO 27001:2022 programme and as such is reviewed and externally audited at least annually. This area is further evidenced through the Ideagen ISO 27001:2022 Certificate and the Statement of Applicability.

## Service Levels

Ideagen is committed to delivering high-quality service. Sometimes, routine system maintenance, patching, and updates require occasional planned downtime. Any planned downtime will always happen outside of normal business hours and will be communicated in advance to our customers. Our core Support Team are available Monday – Friday, 08.30 – 17.00 (UK) via email, live chat or phone to discuss any issue within the system. In addition, we have 24/7 system monitoring and failover services to ensure any irregularities are picked up on and resolved quickly.

Ideagen offer three levels of Customer Success Plans which can be purchased offering three levels of support; Premier, Standard and Essential, full information can be found at: [Plan comparisons – Ideagen Customer Excellence \(Standard\)](#)

## After Sales Support

You will be assigned a designated Account Manager who will be the primary contact point for any questions post implementation. The Premier Success Plan also provides access to an in-region Buyer Success Manager as well as a dedicated phone number for directly contacting the Support Team.

The Account Manager / CSM will actively seek to contact you to establish monthly and quarterly reviews at a mutually convenient time to ensure that you are maintaining value from your solution, and happy with the service provided by Ideagen.

For all service level information, please refer to: [Ideagen Support Service Level Agreement \(SLA\) – Help | Ideagen Luminare](#)

## Access to Data (upon exit)

We want to make sure you have everything you need when our Contract comes to an end. Please remember to download and save any of your data from the Software before the termination date, this is important because your data will be permanently deleted from our systems after that point.

Once the Contract ends, and unless otherwise agreed, we won't be able to maintain your data or other information you've submitted and we'll proceed with deleting all copies from our systems (unless we're required by law to keep them).

If you'd like our assistance extracting your data from the Software, just let us know at least 30 days before your termination date, we'll do our best to help. Please note that any assistance we provide will be subject to our standard professional services rates to cover our time and costs.

## Contact Details

Please email [g-cloud@ideagen.com](mailto:g-cloud@ideagen.com) with a brief description of your requirements and include the following contact details:

- Name
- Role
- Contact e-mail
- Telephone number
- The solution you are interested in

Ideagen will pass your enquiry to the most appropriate Team Member who will contact you to gather any additional information.