



Ideagen Quality Management Professional

(formerly known as Q-Pulse)

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

Ideagen Quality Management is a software application that helps you and your organisation achieve quality compliance, regulatory obligations and mitigate risk.

A system that places Quality, Health, Safety and Environment (QHSE) at the heart of everything the Buyer does and provides them with the confidence they need to demonstrate they are reaching their full potential.

The software helps Buyers to understand their organisation like never before by transforming their QMS from being a repository of QHSE Information to a source of QHSE Intelligence.

Ideagen Quality Management allows Buyers to shift QHSE from a vertical function into a horizontal process, embedding QHSE within everything they do. In short, it allows them to go beyond complying with regulations and standards to establish demonstrable business improvement.

Ideagen Quality Management enables Users to support business processes by helping to identify and assess risks and opportunities to their business with robust risk management functionality; interrogate quality and compliance related data using Ideagen Quality Management's powerful analytic capabilities and native dashboards, to support business process improvement through a transparent culture of accountability.

- It makes retrieval of the information you need quicker and easier, improving efficiency and compliance
- It reduces paperwork and bureaucracy allowing teams to focus on value-add work, not administration
- Its interface has a familiar look and feel – especially if you are used to other Windows Applications
- The agentic AI functionality predicts risks, safeguard your people, enables you to audit at scale, and simplifies compliance

Applications

- Clearly demonstrate compliance with Standards and Regulations
- Highly customizable to suit your process and procedures
- Removes admin burden, allowing focus on continually improving your Organisational Performance
- Identify, investigate and analyse trends to mitigate risk and embed a culture of quality across the Organisation

A common issue for our Buyers prior to purchasing Ideagen Quality Management is that they are managing their quality processes via several formats. This can

include several pieces of software and/or excel spreadsheets and physical documents that focus on certain areas in relation to quality management.

Implementing Ideagen Quality Management allows our Buyers to streamline their business by bringing key aspects of their quality processes closer together.

Introducing a singular QMS allows them to have a complete, real-time vision of their business that promotes the ability to make informed decisions where they deem necessary.

These key decisions are vital as it enables these businesses to adhere to their regulatory obligations by meeting key standards, whilst also ensuring that the quality of their products/ services meet the expectation of their Buyers.

Although we do have many Buyers in the Public Sector, Ideagen Quality Management is a diverse QMS that has assisted companies in several industries including Aerospace & Defence, Aviation, Construction, Energy, Food & Drink, Healthcare, Life Science, Pharmaceutical and Manufacturing.

See Ideagen Quality Management in action!

<https://play.goconsensus.com/ac9aed824>

Features and Benefits

Ideagen Quality Management is comprised of a series of interacting modules designed to streamline key compliance functions. The most used modules are:

Documents

Used for approving, reviewing and securely storing all documented information that people within an organisation follow. This allows users to control data, secure information streams and connect their business to a single source of truth.

Benefits

- A secure, central repository to store controlled documents, policies, processes and procedures easily and efficiently

- Documents can quickly be located, updated or removed from circulation to support compliance
- Approval and management workflows allow for integrated communication and teamwork across departments and functional areas
- The status of documents is made visible across the entire business, providing full transparency and audit trail
- Accelerated cycles for reviewing and approving documents lead to better-quality content, generated through a streamlined process
- Users see content in a consistent framework and have full confidence that the documents they access are accurate, up-to-date and correct for their day-to-day activities
- Faster access to authorised content with a comprehensive audit trail of all changes lowers the cost of complying with standards and regulations and mitigates errors

Audits

Ideagen Quality Management Audits is the Quality, Health, Safety, and Environmental Audit Management Module within our Ideagen Quality Management software suite. With Ideagen Quality Management Audits you can plan, schedule, and perform any type of QHSE Audit or Inspection, from Process and Company Audits to Health and Safety and Product Quality Inspections.

Benefits

- Embedded compliance across the organisation
- Uncover and address risks
- Create and store audit templates featuring question banks and checklists
- Instant audit report generation
- Record findings, develop recommendations and implementing action plans
- Assign responsibility for audits section by section
- Audit scores and findings to pinpoint weaknesses and non-conformances

CAPA

The CAPA Module allows you to streamline, centralise and automate any kind of business process. It allows for Buyers to record any kind of issue and respond with configurable digital workflow. Actions can be funnelled to the right personnel, issues are addressed, and a data-driven culture of continuous improvement is embedded.

Benefits

- Configurable workflows that drive actions to completion
- Issue reporting forms encourage workforce accountability and collaboration
- Audit trailing, email notifications, workflows, and reminders/escalations to ensure the correct action(s) are completed in a timely manner
- Cross-module functionality e.g., audit findings

Buyer / Company Modules

Ideagen Quality Management Buyer and Company Modules allow management of third parties within the Ideagen Quality Management software suite. It provides a dashboard for recording, centralising, and managing an organisation's interaction with what ISO defines as 'Interested Parties'. It allows businesses to have complete control and visibility of their supply chain, contractors, Buyer base and regulatory relationships.

Benefits

- Build a living register of ISO Interested Parties including Suppliers, Buyers, Regulators and Stakeholders
- Capture Buyer compliments and complaints or supplier non- conformance and recalls, providing supporting evidence for any Buyer audits and reviews or any Supplier audit/contract reviews
- Access categorised interested party relationship information including contact details, product information to attached contracts and SLAs
- Assess, review, and approve or reject Suppliers for a strong and compliant supply chain

- Reduces non-conformances and promotes collaborative working, building positive culture of quality
- Quickly and easily manage corporate governance, and environmental responsibility within your supply chain

People & Training

Ideagen Quality Management People & Training is the Training Management Module within Ideagen's Quality Management Software Suite, providing an easy-to-use repository for scheduling and recording training and Continuous Professional Development (CPD). It provides businesses with a centralised library of training and competence information, allowing to plug skill gaps, grow the workforce, demonstrate compliance to auditors and improve staff retention and morale.

Benefits

- Store training records in a centralised library
- Build and schedule training sessions and push prompts and reminders to designated users
- Build bespoke training categories and link them to designated job roles and industry standards
- Access a living library of completed and scheduled training to provide and demonstrate staff competence to Auditors and Regulators
- View upcoming training from a clean and simple calendar view
- Drill into training by User or course
- Add new courses and sessions to plug skill gaps and strengthen the workforce in line with organisational objectives and regulatory requirements
- Build multiple matrices to enable you to view staff competence in a specific department/ shift pattern, identifying any gaps in training or skills
- Support succession planning by comparing individuals or groups to defined job roles to determine who would be best to fulfil a role

- Improve staff morale and retention by empowering them through a comprehensive training plan aligned to their current role, engendering confidence in their capabilities

Assets & Equipment

Ideagen Quality Management Assets & Equipment is the Asset and Equipment Management Module within Ideagen Quality Management software suite. It provides a dashboard for recording, calibrating and upkeeping a business' physical asset base. It offers a centralised inventory of every piece of equipment a business owns including PC's, lab equipment and manufacturing machinery.

Benefits

- Build a living library of all physical assets and equipment, with key information from locations to serial numbers
- Push maintenance, calibration and upkeep actions and notifications to relevant staff to maximise operational performance and mitigate outages and downtime.
- Demonstrate control and compliance with a safe, managed asset base
- Maximise the health of assets and minimise risk with a proactive and controlled maintenance schedule
- Centrally plan and execute services, calibrations, and safety tests, with complete historical records of each asset providing complete visibility

Incident Reporting, Investigation, and Action Tracking

Ideagen Quality Management Incident Reporting and Management System (IMS) is available within our Ideagen Quality Management Solution as detailed on the price list. The reporting features let you manage all aspects of incident reporting and investigation from simple checklists to full-blown accident investigations.

Benefits

- Built in form designer makes is intuitive and easy to use making it simple to create forms and capture information

- Manage workflows by applying intelligent routing to each form type to notify relevant parties based on the information provided
- Automatically assign actions to the correct people and track actions to conclusion using reminders and escalations
- Understand if you are dealing with single instance or a series of related incidents with intelligent data matching
- Custom occurrence mapping is available on request to enhance accuracy and utility and will be charged at the hourly rate defined on our price list once requirements have been scoped
- Risk assessment throughout the investigation process utilising risk matrices to define severity and inform subsequent actions
- Automatic visibility of new events, investigations, trends, and thresholds
- Attachment of new evidence to support the investigation process

Risks

Ideagen Quality Management Operational Risk is the Risk Management Solution available to purchase alongside Ideagen Quality Management Software Suite at an additional cost as per the price list. This allows Buyers to pinpoint, record and manage their Risk Environment. It provides a centralised library of risks, scores, and controls.

Benefits

- Build categorised registers of any type
- Assign responsibility and stakeholders to risks
- Define your control framework and mitigate risk
- Schedule regular and automatically recurring assessments
- Apply banding, matrices, and bowtie functionality to define controls and barriers as well as recovery measures and actions
- View colour-coded target, inherent and residual scores
- Map and understand interdependencies
- Document risk management activities, demonstrate compliance and prove effective controls are in place

- Integrated with IQM to feed into the plan, do, check, act (PDCA) cycle within IQM to embed learnings and mitigate reoccurrence

The Ideagen Quality Management App

The Ideagen Quality Management App for iOS or Android is an optional add-on that can be included as standard within all our packages. This allows users the flexibility to access Ideagen Quality Management Documents, Audits and Occurrence Reporting in a way that meets their day-to-day needs.

Benefits

Documents

- Users have live access to view documents distributed to them or available through permissions
- Offline access to read documents downloaded to the device
- Acknowledge distributed documents

Audit

- Download audits to perform offline
- Raise findings offline which will be created once an online sync is performed
- Automatically download documents which are in scope to be able to view when offline
- Use the device microphone to dictate text into appropriate fields

Occurrence Reporting

- Forms can be completed offline and submitted once online using the sync capability
- Take pictures as evidence which will be automatically uploaded as attachments to the report once online
- Partially completed reports are stored on the device and can be resumed as and when required

Ideagen Mazlan – Agentic AI

Traditional systems create barriers that directly undermine safety culture and compliance outcomes. These systems trap safety professionals in an endless

cycle of user support, data cleanup and chasing incomplete reports – barriers disguised as enterprise features.

Mazlan removes this trade-off entirely, making quality and compliance natural for everyone in your organization. The system guides users through every task, maintains the rigor and compliance you require, and scales your expertise across thousands of employees – without adding to your workload.

Benefits

- Agentic implementation agents dramatically compresses implementation timelines, reducing a 6–9 month implementation to just 30 days
- Long forms and complex navigation are replaced with natural language interactions, moving from 45-minute tasks to 60 second dialogues
- AI agents guide users through tasks, dramatically reducing training requirements and costs
- Simple, intuitive interfaces drive user adoption, ensuring compliance and data quality

Outcomes and Deliverables

Implementing Ideagen Quality Management allows you to gain complete organizational visibility, easily identify and act on risks, and make the most of opportunities. Unlock smart data-driven decision making and secure world class processes that satisfy your Buyers and Regulators, grow your business and secure new quality standards.

- Achieve comprehensive organizational visibility
- Seamlessly identify and respond to risks
- Harness data-driven decision making
- Meet regulatory requirements and quality standards

Case Studies

NHS North Cumbria

Discover the impact of Ideagen's Digital Training Solution on patient safety at North Cumbria Integrated Care NHS Foundation Trust. They were able to quickly

and effectively roll out the solution for medical device training following the challenges of the Covid-19 pandemic. The video link below covers the Trust's transition to digital learning, ensuring uninterrupted focus on patient safety through an innovative online platform. Highlights include the swift response of the North Cumbria NHS Trust to the pandemic, the strategic implementation of Ideagen Academy for comprehensive training management and the significant improvements in training compliance and patient safety outcomes. Aimed at Healthcare Professionals across the spectrum, this video underscores the essential role of digital transformation in maintaining and enhancing patient care standards. Don't miss this opportunity to explore how digital training solutions facilitate regulatory compliance and advance patient care. Watch the full video now and engage with a community dedicated to healthcare quality and innovation.

[Video case study: North Cumbria Integrated Care improve their patient care \(youtube.com\)](#)

Benefits

- Med Device Training using Ideagen Quality Management and Academy for 6,000 members of staff
- Focused at keeping patients safe and saving lives
- Delivering consistent high quality care
- Supporting extensive knowledge requirements of Nurses and Staff
- Easy access / 1 source of truth / demonstrates compliance and competence
- Efficient and consistent standardised repeatable training
- Improved Trust Board confidence
- Improved staff morale
- Time savings allowing more direct patient engagement
- Mitigating staff shortages by ensuring maximum efficiency
- 75% of staff fully compliant, remaining 25% are staff who are on leave in one capacity or another (sick/ maternity etc)

South Tess NHS Trust

At South Tees NHS Trust Hospital, the Department's paper based Quality Management System (QMS) was becoming cumbersome, and staff were finding it difficult to locate documents. Ideagen Quality Management was initially implemented to help achieve ISO 9001 compliance across Radiotherapy Physics Department, part of Medical Physics. However, its use was soon increased to include Radiotherapy Physics, Radiotherapy, and the Oncology Department – three Departments operating across two geographical sites.

Benefits

- Staff can find documentation – such as procedures and processes = quicker than with previous paper system, through using keyword searches in Ideagen Quality Management
- Increased staff engagement with the Quality Management
- Achieved compliance with ISO 9001 requirements

Wales Research and Diagnostic PET Imaging Centre

Ideagen Quality Management QMS is widely known in the Medical Physics Industry and is broadly used across the fields of Radiotherapy and Nuclear Medicine where a strong quality management system is essential to meet the stringent regulatory requirements. Professor Marshall has been a user of Ideagen Quality Management since 1995 where he adopted the system as a straightforward Document Management Tool. However, he quickly adopted Ideagen Quality Management's other modules after realising the added capabilities and advantages of the system.

Benefits

- Enables the migration to a paper-free clean room, reducing the risk of contamination
- Ability to have a central risk register and real-time monitoring
- Having visibility of the effectiveness of controls and the risks to patients, staff, and the business

- Ensures an increase in compliance in both nuclear and pharmaceutical regulations

Plymouth Hospitals NHS Trust

Inter-dependent Departments within Plymouth Hospitals NHS Trust required automation of their compliance activities under one central system. They chose Ideagen Quality Management, a Compliance Management Software System from Ideagen, to help them efficiently and effectively manage their compliance processes and procedures across traditional organisational boundaries within the Trust.

Within the Trust's main hospital, Derriford Hospital, Ideagen Quality Management was already successfully being used to manage compliance activities in the Pathology and Medical Physics Departments – manual paper-based systems were adopted throughout the others.

Upgrading to Ideagen Quality Management Enterprise Edition enabled multiple database access to Ideagen Quality Management across various Departments within the hospital. Each discipline now has their own database over which they have complete control, whilst allowing the Trust to successfully centralise their QMS information.

Benefits

- Ideagen Quality Management Enterprise quickly and cost effectively rolled out to other Departments within the Hospital with support from Ideagen
- Eased management of compliance processes required for ISO 9001 and the CPA
- Effective Document Control, Auditing and CAPA processes organisation-wide
- Low maintenance required for Ideagen Quality Management Enterprise, taking the strain off hospital's IT Department

NHS Grampian

Already users of Ideagen Quality Management, NHS Grampian's difficulties lay in their departments' usage and knowledge of the solution. Labs & Radiotherapy shared a database, while Civil Contingencies were extensive Users. However, Pharmacy and Nuclear Medicine had never used Ideagen Quality Management and were completely new to the solution. The principal issue was that there was disconnected knowledge and ways of working with no sharing of best practice across departments.

Ideagen Quality Management Enterprise allowed NHS Grampian to operate multiple Ideagen Quality Management databases on one server, meaning all five Departments were working from within the one system. This brought with it familiarity of process with regards to Quality and Safety Management.

With Ideagen Quality Management Enterprise, each Department immediately saw benefits across their processes including document management – particularly in version control and document approvals – corrective actions, supplier, and asset management.

Benefits

- Central database for meeting the regulatory requirements of CPA and MHRA
- Electronic training records and staff records updated for 170+ staff across 25 sites
- Over 1000 process documentation managed centrally in the system
- 900 assets being tracked ensuring equipment is up to date, maintained and safe
- Evidence of over 100 audits in the system making it easier for Auditors to assess and report on operational performance and compliance
- Pathology procedures across the UK centralised and managed from within one system meaning it's easier to manage compliance

Southampton University Hospital's Biomedical Research Facility

The University Hospital Southampton NHS Foundation Trust Biomedical Research facility provides the clinical platform for the research activities for Southampton's major NIHR-funded translational research centres and units, including the NIHR Southampton Biomedical Research Centre, NIHR Southampton Respiratory Biomedical Research Unit and NIHR Cancer Research UK Experimental Cancer Medicine Centre.

Ensuring quality and safety are fundamental to the success of the facility, underscored by its status as one of only four publicly funded clinical research facilities with full early phase accreditation from the Medicines and Healthcare products Regulatory Agency (MHRA). Heavy document management and processing demands across Southampton's NIHR infrastructure and Hospital Trust R&D Office placed increasing time and staffing pressures on these groups, with significant challenges in version control, effective sharing, and unified access to critical information.

The Team initially implemented Ideagen Quality Management to improve control of their documentation but, quickly realising Ideagen Quality Management's capabilities, meant they could use it to manage their assets effectively as well.

Through Ideagen Quality Management, Staff electronically acknowledge and approve SOPs and other documents relating to their research, ensuring central control and oversight of changes. At the same time over 1,000 pieces of equipment and associated records are on the system, meaning appropriate members of staff are automatically notified of calibration and maintenance dates via the solution.

Benefits

- A hosted Ideagen Quality Management Solution overcomes strict NHS N3 network access restrictions to allow staff from University and Hospital alike to access clinical research documentation
- Effective document control has been achieved through central management of processes, SOPs, and other documentation

- Over 1,000 items of clinical research facility equipment managed in Ideagen Quality Management, automating maintenance, servicing and calibration scheduling

Homerton Fertility Centre

One of the first NHS Trusts to achieve Foundation status is ensuring that its fertility services can continue to achieve accreditation to national standards with Ideagen Quality Management.

Based in the east London borough of Hackney, Homerton University Hospital NHS Trust provides healthcare services to Hackney and the City of London. The Trust's Fertility Centre offers a full range of fertility services.

Ideagen Quality Management, the compliance management software developed by Ideagen, was implemented by Homerton Fertility Centre to help them both achieve and maintain operations to regulations including the Human Fertilisation & Embryology Authority (HFEA).

Benefits

- A formal Quality System is now in place, making it easier to stand up to Human Fertilisation and Embryology Authority (HFEA) inspections
- Controlled access to easy-to-find information results in staff finding it easier to maintain and improve processes for auditing and CAPA management
- Staff are aware of new protocols, document reviews and/or revised policies due to automatic reminders from Ideagen Quality Management
- Access to accurate information has helped reduce the risk of staff accessing outdated data and documentation
- With access to Ideagen Quality Management from all consulting rooms, up-to-date information can be printed and given to patients at point of need

NHS Blood and Transplant

In 1997, NHSBT, known then as the National Blood Service, required a software solution which would help them manage quality records for the organisation electronically. This was driven by the ever-increasing demands of Regulatory

Bodies such as MHRA, against GMP and the EU Blood Directive. As such, finding a solution was fundamental if they were to achieve, maintain and demonstrate compliance to regulatory standards and practices. There was a need to have one centralised, electronic system which would not only help the National Blood Service fulfil its mandatory obligations but would also help drive performance improvement.

Benefits

- Development of national document control system
- All UK-sites working with the same system
- Working to budget, helping to keep the blood collection process efficient and low cost
- No paper-based incident reporting – all electronic
- Trend review and root cause analysis leads to organisational learning and improvement opportunities

Royal Wolverhampton NHS Trust

As thorough and experienced Users of Ideagen Quality Management since 2004, the software, from Ideagen, had become of vital importance to Royal Wolverhampton NHS Trust's Pathology Department and had helped simplify the tasks associated with its compliance efforts. Indeed, Ideagen Quality Management played a key role in achieving and maintaining compliance to ISO 15189 and meeting strict criteria laid down by regulatory bodies such as MHRA, HTA, CQC and HSE.

It was during the transition from CPA to ISO 15189, however, that the Trust's Pathology Department realised that they had to address an issue regarding documented evidence for the validation of its Ideagen Quality Management System. To successfully achieve certification to ISO 15189, documented evidence for Ideagen Quality Management had to exist and be made available for assessors. In short, to achieve this documented evidence, the Department would have to validate its entire Ideagen Quality Management system – a potentially lengthy and painful operation.

Ideagen and CompliancePath, a Scottish-based Expert in Software Validation Services with over 20 years' experience, offer a Ideagen Quality Management validation pack to Buyers who require the software to be validated against a specific standard or set of standards. The pack assists organisations – such as the Royal Wolverhampton NHS Trust – by touching on each Ideagen Quality Management Module in depth and providing a simple guide to follow for successful validation.

Benefits

- Easy to follow validation package offers a step-by-step guide to validation of Ideagen Quality Management – removing potentially months from the validation period
- Quick certification to ISO 15189, reducing the impact on the Pathology department and quality management levels in general
- Significant savings on associated staffing costs
- Validation Pack covers all Ideagen Quality Management modules in detail, leaving no stone unturned during validation
- "Fantastic" and "hassle-free" service by both Ideagen and CompliancePath- removing a "major headache" for the Pathology Department

Cambridge University Hospitals NHS Foundation Trust

As one of the world's foremost University Teaching Hospitals and one of England's leading Hospitals, Cambridge University Hospitals NHS Foundation Trust provides local services to more than half-a-million people in the Cambridge area.

The Trust previously used a paper-based Quality Management System (QMS) that was difficult to manage and concluded that an electronic QMS would significantly ease the collation of the ever-increasing amount of mandatory documentation required to comply with Good Clinical Practice (GCP).

Since Ideagen Quality Management has been implemented, both Departments are on top of their SOP documentation, training records and equipment management.

Benefits

- Achieved the highest standard of compliance, most notably in their recent MHRA GCP inspection wherein scrutiny of the system found zero non conformances
- The CCTU joined list of top research facilities by gaining registration with UK Clinical Research Collaboration Network
- Document and information retrieval in seconds, quickening and easing inspections from bodies such as MHRA
- Up-to-date maintenance and equipment records

Medway NHS Foundation Trust

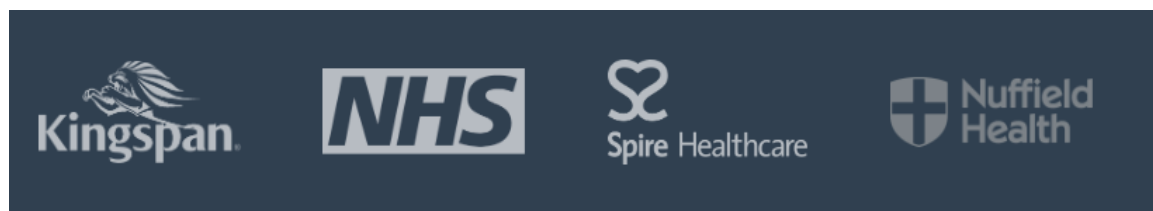
Previously known as the Imaging Services Accreditation Scheme (ISAS), the accreditation changed its name in 2019 to the Quality Standard for Imaging (QSI). The Standard itself remains the same as the ISAS Standard v3.0 and will continue to be reviewed every four years.

Medway NHS Foundation Trust is an acute Trust which sees a range of patients from A&E, outpatients, and GP/Direct access patients. The Imaging Department is formulated of General X-Ray, Interventional, Ultrasound, MRI, CT, Nuclear Medicine with its own Radiopharmacy Department onsite, an Osteoporosis Unit and Breast Screening.

The Imaging Department within Medway NHS Foundation Trust are currently using Ideagen Quality Management to ensure their policies, procedures, protocols, and patient information is always up to date in a timely manner. It provides a central location for all documentation, and it is a communication tool to all the staff within Imaging.

Benefits

- Ideagen Quality Management provides consistency around the department
- Documents can be easily organised
- Allows effective storage and communication of documents



Trial Service

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

Technical Requirements

Where Buyer Data is hosted by Ideagen, the Buyer does not need to manage or consider any server requirements, as all infrastructure is fully handled by Ideagen. They only need to ensure their PC's and mobile devices meet the necessary specifications for optimal performance.

- The Windows Client requires Microsoft Windows 10 or newer
- Web Client supports modern browsers; Chrome and Edge recommended
- The mobile app works on both Android and Apple iOS

Hosting Options and Locations

For UK Users of the IQM Pro service, all data is stored in the AWS Cloud in the eu-west-2 (London) Region, however the solution is available from a broad range of international locations. AWS operate at least three availability zones per region for DR and high availability. All data storage is geo redundant and will never leave the specified regions.

Data Back-Up and Restoration

The backup schedule incorporates a daily full backup and hourly transaction log backups with disaster recovery backups synchronised securely to Amazon S3 (Simple Storage Service). Amazon S3 provides durable infrastructure to store important data. Data on S3 is redundantly stored across multiple facilities and multiple devices in each facility. Importantly, to address regulatory requirements, the data stored in S3 never leaves the Buyers nominated region in which the storage bucket was created. Data is transferred to Amazon S3 using TLS 1.2 with automatic encryption of data once it is uploaded using the industry standard AES-256 algorithm.

Automated testing of backups is performed using a hands-off approach. Scripts are run remotely from the AWS Systems Manager console to restore a copy of the latest backup before removing the temporary database. This approach ensures backups are routinely validated without Ideagen staff having access to any Buyer data or server instances. We restore backups during upgrades to ensure they are functional and fit for purpose.

On instance backups are retained for 2 days and immutable DR backups retained for 7 days with old backups automatically deleted.

There is a documented BCDR Plan for the Ideagen Quality Management Service which is tested at least annually. Findings from BCDR testing are tracked to ensure corrective measures are implemented. The Plan includes various scenarios such as loss of an Availability Zone and loss of a critical AWS service which impacts the availability of the service. Testing involves multiple teams within the business to ensure it is as representative as possible. Further details can be provided to the buyer on request.

Security

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 principals of the Scrum framework, as defined in the Scrum Guide at Scrum.org, to achieve this.

A combination of Static Application Testing (SAST) and vulnerability scanning occurs to reduce vulnerabilities in software.

Ideagen Quality Management Professional developers follow OWASP Guidelines. Secure code review is performed at time of development and for major releases.

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 Process (SDLC) document forms part of our ISO 27001 and ISO 9001 Frameworks and is reviewed by our Risk and Audit Team and Document Owner 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!

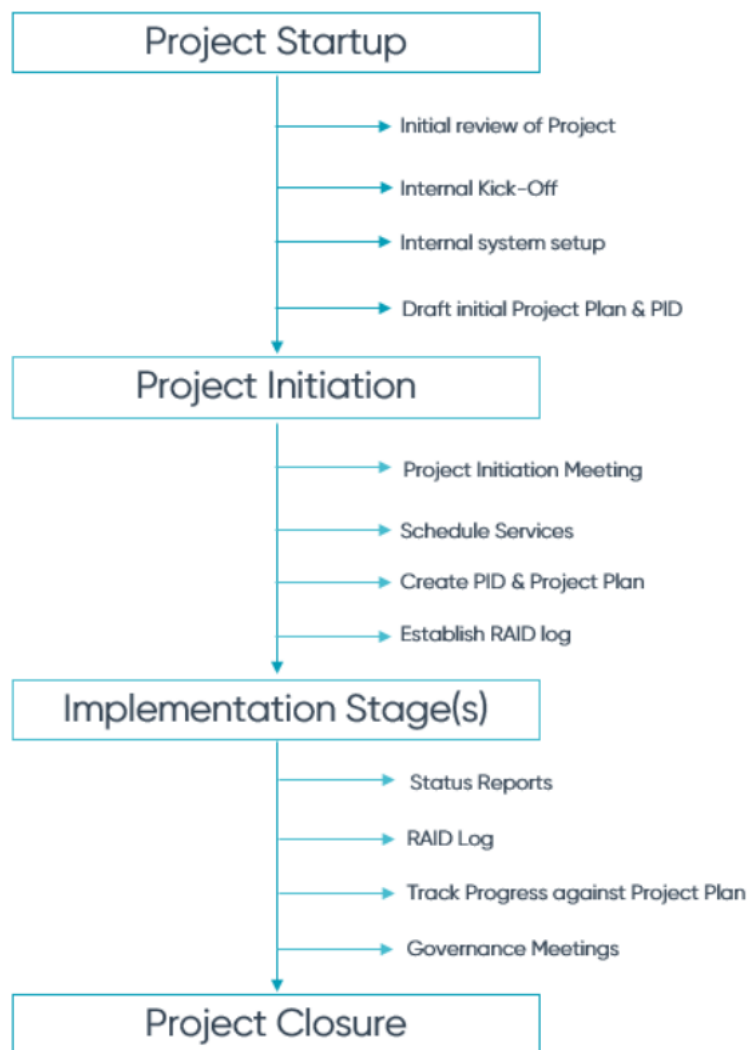
Onboarding and Offboarding

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.

Buyer Service Constraints

Software maintenance patches and upgrades are scheduled at a mutually convenient time, with prior notice provided to Buyers.

There is no fixed lead time between the release of enhancements and the installation of upgrades, as this depends on the availability of both the Buyer and the Ideagen Implementation Team.

The Ideagen Implementation Team will carry out upgrades according to the agreed schedule. Typically, these are arranged outside normal working hours to minimize disruption.

Outage and Maintenance Management

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.

The Buyer will periodically receive notifications about software upgrades, including new versions, service packs, and patches.

Upgrades and updates to the products will be provided during the maintenance coverage period. Please note that certain upgrades may incur additional charges.

Although a new release is not always a mandatory update; we would always recommend that the Buyer stays within the last 3 releases i.e. current release and two previous releases to stay abreast and receive the value of the enhanced software.

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.

The Disaster Recovery Plan for the solution is based around the ability to redeploy a client stack from code to an alternative Availability Zone within the same region before restoring the database from immutable DR backups. Client data and on-instance backups are stored on Amazon EBS volumes. EBS volumes offer high availability and durability with automatic replication within an availability zone to protect against component failure. The service can suffer a complete loss of the EC2 instance (compute) resource without any data loss due to the use of EBS volumes.

Disaster recovery backups are stored in S3 which is distributed across a minimum of three physical availability zones within an AWS Region. This provides protection against complete loss of an availability zone for a prolonged duration allowing the service to be restored with minimal data loss.

Service Levels

Ideagen is committed to delivering high-quality service. Sometimes, routine system maintenance, patching, and updates require occasional planned downtime. Our Cloud Operations Team continuously monitors the solution and allocates resources as needed. When performance issues arise, our Support Team reviews and performs the necessary remediation work.

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

The link above outlines priority classification, response times, and gives details of how to contact Ideagen Support.

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 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.