



Ideagen Contracts Compliance

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 Contracts Compliance is a comprehensive, cloud-based contract lifecycle management (CLM) solution built on Microsoft 365 SharePoint. The platform enables organisations to streamline contract processes from initial request through execution, renewal, and expiration, ensuring compliance, reducing risk, and improving operational efficiency.

Designed for enterprise organisations in highly regulated industries, Ideagen Contracts Compliance provides end-to-end contract lifecycle management with

robust workflow automation, version control, compliance reporting, and seamless integration with the Microsoft 365 ecosystem.

Features and Benefits

Ideagen Contracts Compliance is a scalable, cloud-based solution with an intuitive interface that helps you to:

- Centralise all contracts in a single, secure repository
- Automate contract workflows from request through approval and execution
- Ensure compliance with regulatory requirements and internal policies
- Reduce contract risk through comprehensive audit trails and version control

Contract Lifecycle Management

- Complete contract lifecycle from request through renewal and expiration
- Standardised contract request and intake processes
- Configurable contract templates and clause libraries
- Automated contract renewal notifications and expiration tracking

Workflow Automation and Approvals

- Customisable approval workflows based on contract type, value, and risk
- Parallel and sequential approval routing
- Automated notifications and reminders to stakeholders
- Escalation capabilities for overdue approvals

Version Control and Audit Trails

- Complete version history for all contract documents
- Comprehensive audit trails tracking all user actions and changes
- Document comparison capabilities to identify changes between versions
- Immutable historical records for compliance and litigation support

Compliance Reporting and Dashboards

- Real-time dashboards providing contract status and key metrics

- Customisable reports for contract value, obligations, and milestones
- Compliance monitoring and obligation tracking
- Export capabilities for regulatory reporting requirements

Microsoft 365 and SharePoint Integration

- Native integration with SharePoint Online for document management
- Single sign-on through Microsoft Entra ID (Azure AD)
- Collaboration capabilities leveraging Microsoft Teams and Outlook
- Integration with Word for contract authoring and editing

Search and Metadata Management

- Advanced search capabilities across all contract content and metadata
- Configurable metadata fields for contract categorisation
- Full-text search within contract documents
- Saved searches and alerts for contract events

Outcomes and Deliverables

Organisations that implement Ideagen Contracts Compliance can expect to achieve:

- Reduced contract cycle times through automated workflows and approvals
- Improved compliance through standardised processes and comprehensive audit trails
- Enhanced visibility into contract obligations and key dates
- Reduced risk through version control and approval workflows
- Increased efficiency by eliminating manual contract tracking
- Better contract outcomes through improved collaboration and communication
- Cost savings through improved contract negotiation and renewal management
- Seamless integration with existing Microsoft 365 infrastructure

Technical Requirements

Ideagen Contracts Compliance operates as a native Microsoft 365 SharePoint application and requires:

- Microsoft 365 subscription (E3, E5, or Business Premium)
- SharePoint Online environment
- Azure Active Directory for user authentication
- Modern web browsers: Microsoft Edge, Chrome, Firefox, or Safari (latest 2 versions)
- Internet connectivity with access to Microsoft 365 services
- No additional hardware or server infrastructure required

Hosting Options and Locations

Ideagen Contracts Compliance is hosted on Microsoft Azure cloud infrastructure within UK data centres to ensure compliance with UK data residency requirements.

UK Data Residency

All customer data is hosted exclusively within the United Kingdom to ensure full compliance with UK data protection and residency requirements. Ideagen Contracts Compliance leverages Microsoft Azure UK datacentres:

- **Primary Region:** Microsoft Azure UK South (London)
- **Secondary Region:** Microsoft Azure UK West (Cardiff)
- Data never leaves UK sovereign territory
- Geo-redundant storage within UK regions for high availability
- Compliant with UK GDPR and Data Protection Act 2018

Infrastructure and Architecture

The service operates on Microsoft's enterprise-grade cloud infrastructure with:

- Multi-tenant architecture with logical data segregation
- Automatic scaling to meet demand
- Load balancing across availability zones
- Redundant power, cooling, and network connectivity
- 24/7 monitoring and infrastructure management

Data Back-Up and Restoration

Backups are configured through Microsoft Azure managed services to support our Recovery Time Objective (RTO) and Recovery Point Objective (RPO) requirements. Backups are stored redundantly across multiple facilities within the UK.

There is a documented Business Continuity and Disaster Recovery (BCDR) Plan for the solution which is tested at least annually. Findings from BCDR testing are tracked to ensure continuous improvement of the recovery procedures.

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 customers, 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

Implementation Programme

Ideagen Contracts Compliance is delivered through a structured 45-day (9–10 week) implementation programme designed to ensure successful deployment, user adoption, and realisation of business value. The programme consists of six phases with defined deliverables and milestones.

Implementation Timeline: The standard implementation spans 9–10 weeks from project kick-off to go-live, with an additional 60-day follow-up period for ongoing support and optimisation.

Phase 1: Project Introduction and Discovery (Week 1)

Objectives: Establish project governance, confirm technical requirements, and align on business objectives.

Activities:

- Project kick-off meeting with key stakeholders (2 hours)
- Technical discovery session to review Microsoft 365 environment (1.5 hours)
- Business requirements workshop to document contract workflows (2 hours)
- Define project scope, success criteria, and change control process
- Establish communication plan and meeting cadence

Deliverables: Project charter, technical requirements document, business requirements document, project plan with milestones.

Phase 2: Configuration and Customisation (Weeks 2-4)

Objectives: Configure the platform to meet organisational requirements and business processes.

Activities:

- Deploy Ideagen Contracts Compliance to customer SharePoint environment
- Configure contract metadata fields and taxonomy
- Build approval workflows based on contract types and thresholds
- Create contract templates and clause libraries
- Configure notification rules and automated alerts
- Set up user roles and permissions aligned with organisational structure
- Customise dashboards and reports for key stakeholders
- Configuration review sessions (2 x 1.5 hour sessions)

Deliverables: Configured platform in development environment, documented configuration settings, workflow diagrams, user role matrix.

Phase 3: Testing and Quality Assurance (Week 5)

Objectives: Validate configuration, workflows, and integrations through comprehensive testing.

Activities:

- System integration testing with Microsoft 365 components
- Workflow testing for all contract types and approval scenarios
- User acceptance testing (UAT) with customer stakeholders (1 week)
- Performance and load testing
- Security and permissions testing
- Defect resolution and configuration refinement

Deliverables: Test scripts, UAT results documentation, defect log with resolution status, UAT sign-off.

Phase 4: Super User Training (Week 6)

Objectives: Enable super users and administrators to effectively manage and support the platform.

Activities:

- System administration training (3 hours)
- Advanced user training for super users (4 hours)
- Workflow management and configuration training (2 hours)
- Reporting and analytics training (2 hours)
- Train-the-trainer session for end user rollout (2 hours)
- Support procedures and escalation paths review

Deliverables: Training materials, administrator guide, super user guide, quick reference cards, recorded training sessions.

Phase 5: Data Migration and Go-Live Preparation (Weeks 7-8)

Objectives: Migrate existing contract data and prepare for production launch.

Activities:

- Data migration planning and mapping workshop (2 hours)
- Extract and cleanse legacy contract data
- Pilot migration with sample dataset (50 contracts)
- Validation of migrated data quality and completeness
- Full data migration execution (target: 250 contracts)
- Migration training session for internal team (1.5 hours)
- Production environment deployment
- Go-live readiness review and checklist completion
- Communication plan activation for end users

Go-Live Criteria:

- Minimum 250 contracts successfully migrated and validated
- All critical and high severity defects resolved
- Super users trained and capable of supporting end users
- Production environment validated and performance tested
- Customer sign-off on go-live readiness

Deliverables: Data migration report, migration logs with success metrics, production environment sign-off, go-live communication materials.

Phase 6: Go-Live and Project Wrap-Up (Week 9)

Objectives: Launch production service and transition to business-as-usual operations.

Activities:

- Production go-live with hypercare support (first 2 weeks)
- End user training sessions (multiple sessions, 2 hours each)
- Daily stand-up meetings during hypercare period (15 minutes)
- Issue triage and rapid resolution support
- Usage monitoring and adoption metrics tracking
- Project wrap-up meeting with lessons learned (1.5 hours)
- Handover to ongoing support team

Deliverables: Production service operational, end user training materials, hypercare support log, project closure documentation, lessons learned report.

Post Go-Live: 60-Day Follow-Up

Objectives: Ensure sustained adoption, address any emerging issues, and optimise platform performance.

Activities:

- 30-day checkpoint review meeting (1 hour)
- 60-day health check and optimisation session (2 hours)
- User adoption analysis and recommendations

- Performance tuning and configuration optimisation
- Enhanced training sessions based on user feedback

Deliverables: Adoption metrics report, optimisation recommendations, updated user documentation based on feedback.

Implementation Timeline Summary

Phase	Timeline	Key Deliverables
Phase 1	Week 1	Project charter, requirements documents, project plan
Phase 2	Weeks 2-4	Configured platform, workflow diagrams, user role matrix
Phase 3	Week 5	UAT results, defect resolution, UAT sign-off
Phase 4	Week 6	Training materials, administrator guide, super user guide
Phase 5	Weeks 7-8	250+ contracts migrated, production environment validated
Phase 6	Week 9	Production service operational, project closure documentation
Post Go-Live	Weeks 10-18	Adoption metrics, optimisation recommendations, health check

Ongoing Service and Support

Following implementation, customers receive comprehensive ongoing support:

- 24/5 technical support through customer portal and email
- Regular platform updates and security patches
- Access to online knowledge base and documentation

- Quarterly business reviews for strategic accounts
- Product roadmap updates and feature enhancement notifications
- Optional premium support packages with faster response times

Service Constraints

Maintenance Windows

Scheduled maintenance is performed during defined windows to minimise business impact:

- Standard Maintenance Window: Sundays 02:00–06:00 GMT
- Frequency: Monthly for routine updates
- Notification: 5 business days advance notice via email
- Emergency Maintenance: May occur outside window for critical security patches
- Expected Impact: Service unavailable during maintenance; average duration 2 hours

Customisation Limitations

As a SaaS platform, Ideagen Contracts Compliance operates within defined customisation boundaries:

- Configurable disclosure forms and workflows within standard framework
- Custom fields and dropdown values supported
- Branding customisation (logos, colours) available
- Source code modifications not permitted
- Extensive customisation may require professional services engagement

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.

Backups are configured through Microsoft Azure managed services to support our Recovery Time Objective (RTO) and Recovery Point Objective (RPO) requirements. Backups are stored redundantly across multiple facilities within the UK.

All products are monitored using a managed SIEM/UEBA paring. If any thresholds are met, alerts are presented via our ticketing system to our Cloud and Cyber Operations Team with automatic escalation procedures. Ideagen operates 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

We will be available for support through our online support portal, email or phone for the term of this Agreement, Monday through Friday, please refer to the SLA available at: [Ideagen Support Service Level Agreement \(SLA\) – Help | Ideagen Luminate](#)

In the event there are errors with the Software, the Company will endeavour to solve the issue within 72 hours of receipt of the problem. However, the Client acknowledges that some issues may require longer to resolve.

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 Luminate](#)

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.