



Ideagen Please Review

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 PleaseReview is a scalable solution and is offered as two packages depending on the customers' needs as detailed within our price list.

The key features of Ideagen PleaseReview include.

- **Multi-level permissions.** In Ideagen PleaseReview, the Document Owner has full control over which permissions are given to each person included in the editing and construction of the document; these permissions can be made as granular as necessary, even down to individual paragraphs. The document owner is the only person who can decide which changes to incorporate.

- **Redaction.** Redact pdf documents such that contents are rendered invisible without possibility of discovering the redacted text. Redactions categorised according to type and, by default, set up according to the EU policy 70 PPD and CCI categories.
- **Integration.** API interface supports custom integrations, and Ideagen PleaseReview has a number of standard integrations with industry-standard document management solutions.
- **Version control.** Several people can work on the same document at the same time in Ideagen PleaseReview without feedback being lost or overwritten. Everyone works on a single version of the document giving you a single source of the truth.
- **Detailed reconciliation report of all document activity.** The Document Owner has full visibility of all activity that takes places within a document review cycle, including who has edited what and when. This can be captured and displayed in a detailed reconciliation report within minutes. If the document owner receives questions from an auditor or regulator about the content of a completed document, the report allows them to see quickly who made what contribution and when, as well as review any in-document conversations that were had about the queried content.
- **Collaborate securely with third parties.** When collaborating with people outside of your organisation, they can easily be added to your project in Ideagen PleaseReview. The Document Owner can control which documents they can access, how much of the document they can see and what they can do within it. This makes it a highly secure environment when working on sensitive information.
- **Supports multiple document formats.** When collaborating across Teams and with various types of content, there will likely be more than one format involved. Ideagen PleaseReview supports all Microsoft Office formats, as well as formats such as PDF, plain text, images, and source code. This is a standard feature and involves no extra work for the user. It is also possible to review sets of documents in a single uploaded project.

➤ **Reduce friction, improve inter-departmental and peer review group**

relationships: When multiple stakeholders are involved in the creation and review of a complex document, it can be difficult for a document owner to reconcile conflicting feedback and edits. Ideagen PleaseReview helps to mitigate any conflict within the review process by providing the document owner with simple functionalities to navigate differing edits and opinions. As each stakeholder's contributions are displayed on-screen with equal importance within Ideagen PleaseReview, contributors feel reassured that everyone is treated the same and that their edits are not lost or overwritten by subsequent reviewers. Because all activity is captured in the reconciliation report, the document owner can later use this if necessary to justify why they chose to go with a particular colleague's suggestion over another's.

The table below shows what is included within each of the Ideagen PleaseReview Service Packages as detailed within the price list.

Item	Premium	Dedicated
Ideagen PleaseReview Service with full functionality	✓	✓
Full security package (DPS & CPT & SSL)	✓	✓
Use of Client tools (such as offline review)	✓	✓
Standard reconciliation reporting	✓	✓
SSL (256-bit certificate) ¹	✓	unique
Customer password rules	✓	✓
Option of SAML 2 single sign on ²	✓	✓

Branding with own logo & home page customization	✓	✓
Metrics and customer reporting (cost option)	✓	✓
Ability to configure user types	✓	✓
Ability to configure general options	✓	✓
Dedicated URL with separate IP address	✓	✓
Entirely separate install root	✓	✓
Separate data back-up	✓	✓
Separate dedicated system and administration interface	✓	✓
Option of active user licences	✓	✓
User management service (cost option)	✓	✓
Option to encrypt data at rest		✓
Option of licence purchase or rental		✓
Dedicated server environment		✓
Document storage Limit ³	50GB	100GB ⁴

Notes:

Dedicated servers have a unique SSL certificate. The Business and Premium service has an SSL certificate which covers the entire server.

Please check with Ideagen PleaseReview as to which SAML 2 providers are supported.

This is the size of the files uploaded by the client and on the server at any given time. Additional storage can be purchased.

Dedicated Plus service limit is 150GB.

See Ideagen Please Review in action!

<https://play.goconsensus.com/aac6214aa>

Features and Benefits

Ideagen PleaseReview is an advanced collaborative document review, co-authoring, and redaction solution used by organisations across industries to improve document creation and review processes.

- Maximise productivity with real-time collaboration preventing duplication of effort.
- Robust consolidation report gives an audit trail of every contribution for full traceability.
- Achieve faster turnaround times and meet tight deadlines by reducing review times by up to 65%.
- Reduce review costs by up to 35%.
- Improve version control with all contributions and comments made in one version of the document.
- Gain better control over the document with customisable reviewer roles and zone allocation.
- Produce higher quality documents by focusing reviewers on content rather than formatting, process, or tools.
- Collaborative with 3rd parties without compromising document control or security.

- Redact confidential data to allow for selective disclosure of information and compliance with regulations.
- Gain better visibility of reviews and easily track progress of reviewers.
- Keep everyone involved with automated emails to alert reviewers when they need to take action.
- Secure access anytime and anywhere with access via mobile device and offline.

Outcomes and Deliverables

[International Energy Agency Uses Ideagen PleaseReview | Ideagen](#)

The International Energy Agency (IEA) produces a wide variety of analytical publications and has a strong reputation for analytical excellence. Its flagship publication is the World Energy Outlook (WEO), a reference for the energy industry that looks at the outlook for global energy to 2040. The WEO represents the gold standard in energy market analysis and its accuracy and currency are critical to achieving the agency's goal. Preparing the annual WEO involves an extensive peer review process in which staff send a draft analysis to leading energy experts around the world. The IEA uses Ideagen PleaseReview to streamline the document preparation process, track all document activity and facilitate better interpersonal relationships in the peer review process.

Before the organisation began using Ideagen PleaseReview, the preparation of the WEO was a laborious manual process that required individual mailings to around 400 people. Reviewers would send comments in different formats, which made considering them for incorporation both difficult and time consuming. Each submission had to be considered separately, with each referring in different ways to different parts of the text. This made it difficult to track submissions and to consider them in a consolidated way, as well as to compare the responses of different reviewers to individual parts of the text. At the end of the process, staff had only a few weeks to collate, review and incorporate comments and changes before the WEO went to print.

According to Tim Gould, the IEA's Head of Division who is responsible for the WEO, *"We had to make sure that our peer review process and our interaction with a wide range of stakeholders could be managed efficiently at the highest level with*

all the necessary safeguards. We're always looking for ways to improve the process and streamline where possible, so in 2014 we decided to move across to Ideagen PleaseReview for our peer review."

Since the IEA started to use the software in 2014 for the WEO, Ideagen PleaseReview has become the platform of choice for many of the agency's analytical publications, with other parts of the organisation now using Ideagen PleaseReview for the peer review of their own analyses. Gould states that "We have a very well-functioning system of working with Ideagen PleaseReview for our draft analysis. We're confident that Ideagen PleaseReview plays a big part in allowing us to make sure that our peer review process is managed efficiently at the highest level and with all the necessary safeguards."



Trial Service

Ideagen PleaseReview free 2-week cloud hosted trial available upon request.

Limited to 20 users' total trial and can be extended for a further week with more users if mutually agreed.

To arrange a trial please contact g-cloud@ideagen.com where our Pre-Sales Team will be in touch. Access will be provided via email and SaaS software used via the browser (all major browsers supported).

Technical Requirements

As Please Review is a web-based system there are no specific client requirements other than a modern web browser. The system is tested with latest version of Microsoft Edge, Google Chrome, and Mozilla Firefox on PC and Safari on iPad and Mac.

With respect to the optional client components:

1. The Offline Client (OLC) is a Windows-only tool.

Minimum requirements:

Operating System:

Windows 10 or Windows 11

Microsoft .NET Framework:

7.8.0 and below – install .net framework 4.7.2 or higher.

7.9.0 and above – install .net framework 4.8 or higher.

2. The optional Ideagen Please Review Word Plugin streamlines collaborative authoring through Zones and allows users to initiate reviews directly within Word. It is compatible with Windows 10 and 11, as well as Microsoft Office versions 2016, 2019, 2021, and 365.

Hosting Options and Locations

For UK users of the Please Review service, all data is stored in the Microsoft Azure Cloud in the UK South (London) region, however the solution is available from a range of international locations. UK West (Cardiff) is regional pair for DR and high availability. All data storage is geo redundant and will never leave the specified regions.

Data Back-Up and Restoration

Ideagen uses Azure Backup to protect the Please Review service infrastructure. Azure Backup is Microsoft's native cloud backup solution that provides automated, encrypted backup operations with both full VM and file-level recovery capabilities. Daily backup operations protect each Virtual Machine, scheduled according to the customer's deployment timezone.

During each backup cycle, the system creates a VM snapshot and securely transfers the data to an encrypted storage vault. To enable rapid restoration, snapshots are retained locally for 7 days, whilst the storage vault maintains a 30-day retention period. The full VM backup approach allows complete machine restoration following system failures, with additional file-level recovery capabilities available for restoring individual corrupted or deleted files.

The Ideagen Please Review service 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 Azure 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

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.

There are lead developers who ensure that our development processes are followed, such as peer reviews, testing against the OWASP top 10, etc.

Our pipelines perform Static Application Security Testing (SAST) with each individual artefact build, at all stages of development. Engineers can also run these scans on demand. Scan outcomes are consistently reviewed to identify any security vulnerabilities. We conduct Dynamic Application Security Testing (DAST) prior on every production release.

Scan result reports are only accessible within Ideagen itself.

As per the SDLC, the source code is subject to peer review on an ongoing basis. The Cyber Security Unit (CSU) actively undertake regular penetration testing and vulnerability scans to discover any potential vulnerabilities within Ideagen software.

The Software Development Lifecycle (SDLC) document forms part of our ISO 27001:2022 and ISO 9001 Frameworks and is reviewed by our Risk and Audit Team and document owner at least annually or in the 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!

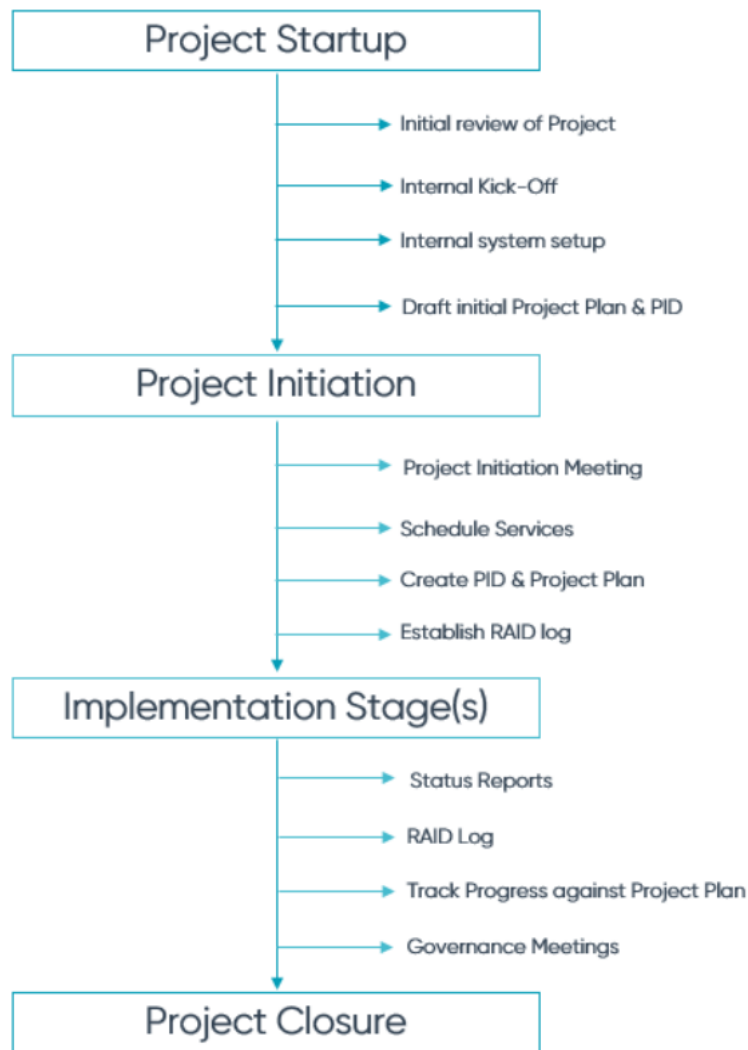
Onboarding and Offboarding

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

Upgrades are optional at release, except when they contain critical security patches.

Maintenance patches and upgrades of the software are scheduled at a convenient time with prior notice.

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.

Update announcements are communicated to all customers through product marketing emails. Each email includes a link to the Ideagen customer portal, where you can access Customer Release Notes, Technical Release Notes, and other resources in the Download Center.

We typically release updated versions three times a year. Upgrades are not mandatory unless they address security vulnerabilities. Maintenance patches and software upgrades are scheduled at a time that is convenient and agreed upon with the customer.

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.

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cycle, the system creates a VM snapshot and securely transfers the data to an encrypted storage vault.

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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 Please Review Service Level Agreement \(SLA\) – Ideagen Please Review | 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 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 contact you to gather any additional information.