



Ideagen Mail Manager Enterprise

(formerly known as OnePlace Solutions)

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 Mail Manager Enterprise allows organisations to connect, simplify and enable the workforce to more effectively engage with SharePoint, Teams and OneDrive.

It helps Public Sector Departments minimise risk by simplifying and automating the process for people to manage email content from a governance, records, and compliance perspective.

Intelligent email tracking provides proactive management of emails, allowing business users to be made aware of content already saved and avoiding the duplication of email records.

The Ideagen Mail Manager Enterprise Software Suite allows Public Sector Organisations to capitalize on their existing SharePoint and Microsoft 365 investment by providing a flexible way to connect, simplify and personalize business systems.

Ideagen OnePlaceMail

Ideagen OnePlaceMail enables users to save emails to SharePoint using a seamless, intuitive and familiar filing experience to minimise change. Email messages and attachments are classified as true and accurate records, with email attributes automatically promoted to SharePoint columns. Once successfully filed, these emails are highlighted (categorized) within the individual's Inbox and automatically within any colleagues' inboxes who are in the email 'To' or 'Cc'. The proactive categorisation of emails provides the benefits of saving time, improving visibility, and avoiding duplication of content. The capture of email to SharePoint or Microsoft 365 supports both received email and saving email when sending.

OnePlaceMail simplifies access to security trimmed SharePoint and Microsoft 365 content directly from with Microsoft Outlook. A User can search for content, leveraging the rich indexing capabilities of Microsoft 365, browse for content while respecting the security permission of the current user, preview and insert content from SharePoint/Microsoft 365 into an email as either a link or as attachments.

The streamlined capture of content, coupled with the convenience of accessing content from where you work within Outlook and Office, encourages Microsoft 365 to be single source of truth for organisation information.

Ideagen OnePlaceDocs

Ideagen OnePlaceDocs delivers enriched documentation management to Microsoft 365, including, saving, managing, and accessing content in a single

interface. The single interface means locations and content from across SharePoint and Microsoft 365 can be presented in security trimmed and logical manner for simplified access regardless of the complexity of the SharePoint / Microsoft 365 environment.

Ideagen OnePlaceLive

Ideagen OnePlaceLive delivers business systems personalized to both the individual user and their job function. Employees can access resources (documents, emails, correspondence, workflows) they are working on or that are relevant to their needs. The simplified and consistent engagement with business systems built on the Microsoft 365 platform from Microsoft Outlook and Office applications drives greater solution engagement and more effective information management, governance, records, and compliance.

Service types

The Ideagen Mail Manager Enterprise software suite is licensed on a subscription basis with the G-Cloud plan providing email and document management.

The subscription license includes pre-implementation and implementation sessions and online training. Support is provided by contact through conference chat/telephone calls, direct email and contact through our support portal.

The Ideagen Mail Manager Enterprise software suite uses your existing document storage systems of Microsoft 365.

The Ideagen OnePlaceMail solution is delivered as an Outlook add-in, available on all current Outlook environments, including OneOutlook, Windows, Mac, Web and mobile devices. Ideagen OnePlaceDocs solution is delivered as Office Add-in's and as a Windows application, providing single pane of glass to access SharePoint / Microsoft 365 locations and content in a personalised manner.

See Ideagen Mail Manager Enterprise in Action!

<https://play.goconsensus.com/b35245ac9>

Features and Benefits

The Ideagen Mail Manager Enterprise suite provides enterprise email and document management for better information management, governance records and compliance across the Microsoft 365 platform.

The solution provides Intelligent personalisation and automation capabilities to engage business users with systems delivered on the SharePoint and Microsoft 365 platform.

Ideagen Mail Manager Enterprise is trusted by public sector organisations across the globe to help achieve more from their investment in Microsoft 365, Microsoft Teams, Microsoft OneDrive and SharePoint.

The solution simplifies Microsoft 365 engagement from Microsoft Outlook and Office to drive better email and document management:

- Connect Outlook to SharePoint, Teams & OneDrive to improve email records management.
- Engage with SharePoint and Microsoft 365 from Microsoft Outlook and Office to minimise change and drive productivity.
- Personalise Microsoft 365 business system the individual and their job function for reduced complexity.

Ideagen Mail Manager Enterprise helps public sector organisations:

Capture

- Unlock valuable information assets trapped in Microsoft Outlook inboxes, Network drives and documents created in Word, Excel, and PowerPoint
- Automate visibility of saved emails across inboxes
- Seamlessly save from Microsoft Outlook, Office, Adobe Acrobat Reader and Windows Explorer to SharePoint on-premises and Microsoft 365
- Capture true and accurate email records from Outlook to SharePoint
- Complete SharePoint metadata when saving, from within your applications.
- Auto capture metadata from SharePoint Document sets

- Create a Single Source of truth, where all email communication is securely filed into the relevant project, team, or designated locations

Capture all Project, Team and Critical Date and Information in a single location.

Classify

- Promote email attributes to SharePoint columns for a complete record of an email message.
- Classify content from Outlook using Terms and Taxonomy and SharePoint metadata.

Access

- Bring SharePoint and Microsoft 365 to the user within Microsoft Outlook
- Search and insert items from SharePoint, Teams, and OneDrive within Microsoft Outlook
- Bring SharePoint to where you work
- Designed to work within your existing Microsoft 365 / SharePoint IT stack, meaning organisations retain and store their own data and confidential information is not hosted by Ideagen

Action

- Start business workflows from Microsoft Outlook such as PowerAutomate forms.

Create

- Create new Documents based on pre-defined SharePoint templates to improve productivity and better compliance.
- Create / Complete form and SharePoint information from within Microsoft Outlook.

Outcomes and Deliverables

When a client purchases Ideagen OnePlace Solutions they can expect to receive their licenses within 48 hours, as outlined in the onboarding section. They will have

regular calls with their Account Manager to ensure that their licenses are rolled out promptly and users are trained to maximise the benefits of the solution.

As an outcome of using Ideagen Mail Manager Enterprise, customer project or client emails and documents are filed into the most appropriate location in SharePoint / Microsoft 365. Organisations benefit from information visibility across teams and departments, and better governance, records and compliance.

Town of Canmore accelerates SharePoint adoption with Ideagen OnePlace Solutions

Industry: Government

Location: Canada

[View case study online](#)

Key Benefits

- 100% eradication of issues in saving from emails and files.
- 50% reduction in time it takes to get users up to speed on SharePoint.
- Streamlined process of accessing and using information, making it faster and easier.

As a small government organisation, the Town of Canmore had adopted Microsoft SharePoint to help manage the growing demands of information management, collaboration, and service delivery for its citizens. Legal and compliance requirements also contributed to the decision to implement SharePoint.

However, gaining user adoption of SharePoint can be challenging, especially in an environment where users aren't familiar with the software. Typically, gaining full adoption takes a significant investment in time and resources. Without full adoption, it is difficult for organizations to get the return on investment that SharePoint can deliver.

Gordon Reid, Manager of Information Technology, Town of Canmore, said, *"I had previous experience in deploying SharePoint and the main obstacle was always*

user adoption. To get users to adopt the platform, it requires close integration with Microsoft Office in general and Microsoft Outlook in particular, since these are the tools that users are most familiar with."

The Town of Canmore needed a solution that would empower users to embrace SharePoint as quickly as possible. The council wanted a solution that was intuitive and easy to use as well as lightweight, requiring very little in the way of major server upgrades or enhancements. It needed to work seamlessly and be easy to administer.

In a previous role at a large multinational organisation, Gordon Reid had used Ideagen Mail Manager Enterprise OnePlaceMail, which connects Microsoft Outlook to SharePoint. It lets users save emails and attachments directly into SharePoint with the touch of a button. Instead of users having to toggle between the two applications, OnePlaceMail creates an add-in that lets users complete their work in SharePoint without ever leaving the Outlook screen.

OnePlaceDocs replicates that functionality in other Office environments such as Word, Excel, and PowerPoint, as well as Adobe PDFs.

Based on that previous experience, the Town of Canmore chose Ideagen Mail Manager Enterprise to provide an integrated solution to help bolster the adoption of SharePoint.

Gordon Reid said, *"Having used it before, I knew that Ideagen OnePlace Solutions offered a robust and functionally rich way to dramatically increase the take-up of SharePoint without causing an undue support burden for the IT Team or for end users. After reviewing a number of other solutions, it was clear that Ideagen OnePlace Solutions was the best choice for the Town of Canmore. It provided the right balance of features and met the budget requirements."*

One of the key differences between Ideagen OnePlace Solutions and other options was that the other solutions, many of which worked very well, tried to replicate too many of the features of SharePoint. That was unnecessary for an organisation that has already deployed SharePoint and added cost and

overhead. By contrast, Ideagen OnePlace Solutions offered just the right functionality."

Ideagen Mail Manager Enterprise offers full functionality out-of-the-box, making the implementation process simple. The Team deployed the solution to a small group of pilot users who had already become immersed in the SharePoint environment.

Gordon Reid said, "With minimal training, the Team was set loose to use OnePlaceMail and OnePlaceDocs in their daily work for four weeks. We didn't want to provide too much training to start with because we didn't want to overburden the Team with training on a system that would be relatively intuitive to use.

During that time, the Team worked with them closely to understand any issues or challenges they had. The challenges were all easily addressed, confirming that a wide-scale rollout of the solution was the right approach.

The first live deployments took place two weeks after that. SharePoint users receive training on how to use the Ideagen OnePlace Solutions functionality as part of their SharePoint training; they don't necessarily see it as a separate solution because the integration is so seamless."

Having OnePlaceDocs and OnePlaceMail in place dramatically reduced the amount of training required from the IT Team to get users up to speed with SharePoint and to get them to integrate SharePoint into their daily routines.

Gordon Reid said, "The Team had previously deployed groups on SharePoint without OnePlaceMail and OnePlaceDocs in place and the number one issue users experienced was in saving from emails and files. This issue was almost 100 per cent eradicated once the Ideagen OnePlace Solutions system was in place.

The IT team estimates that Ideagen OnePlace Solutions has saved approximately 50 per cent of the time it would have had to otherwise spend on getting users up to speed. That time can now be spent on more valuable activities such as migrating data, users, and departments rather than training.

Furthermore, the Team hasn't experienced any pushback from users, which means they're using SharePoint successfully, solving all of the team's issues."

In an unexpected benefit, the rollout of the Ideagen OnePlace Solutions software prompted the Town of Canmore to review some of its business processes around accessing and using boilerplate information. This is a common task for users and, by changing those processes to more closely match the way OnePlaceDocs works, the Town of Canmore streamlined the process, making it faster and easier for users."

Gordon Reid said, "The Team also identified that it does a lot of email management but could improve on this area, so it plans to revisit this with best practices and better governance. Ideagen OnePlace Solutions will be core to our strategy of helping users manage their email going forward."

Sigma Healthcare strengthens internal collaboration with Ideagen OnePlace Solutions

Industry: Legal & professional services

Location: Australia

[View case study online](#)

Key Benefits:

- Streamlined the process of saving emails and documents from Outlook into SharePoint.
- Easier handovers and new hire training with retained corporate knowledge, so productivity was maintained.
- An effective file management system that scales as the business grows.

Sigma Healthcare is a full-line wholesale and distribution business to community and hospital pharmacies. It has the largest pharmacy network in the country, providing Australians access to medicine regardless of where they live. Sigma Healthcare supports pharmacists to be innovative to help shape Australian Pharmacy Care.

Sigma Healthcare drives innovation through collaboration, employee engagement, and business efficiency. The in-house Legal Team's work is digital correspondence-heavy, making it difficult for the growing Team to efficiently manage records and files.

The result was inefficiencies around sharing information, allocating work, and reporting. For Sigma Healthcare, it's important to retain corporate knowledge to productively train new hires with minimal business downtime. Sigma Healthcare needed an effective file management system that considered its current IT landscape and used its existing ecosystem.

Sigma Healthcare already used Microsoft SharePoint to manage legal matters; however, integration with Microsoft Outlook was proving a stumbling block. Saving documents to the SharePoint library was easy enough yet doing so directly from Outlook was the critical part that the business needed to address. The Team needed a cost-effective way to streamline the process of managing documents from Outlook.

Sam Lawson, General Counsel and Company Secretary, Sigma Healthcare, said, *"The Sigma Healthcare Legal Team needed a solution that was both flexible and agile. A lot of off-the-shelf practice management solutions built for law firms have features we didn't need, so leveraging our existing ecosystem was a much smarter choice."*

Sigma Healthcare needed a solution that would make it easier to allocate work, retain corporate knowledge, and drive smarter reporting and data-rich conversations.

After doing a market scan, Ideagen Mail Manager Enterprise stood out as a provider that could meet Sigma Healthcare's needs. Ideagen Mail Manager Enterprise introduced Engage Squared as a key partner with an in-depth knowledge of Microsoft 365, SharePoint, and Ideagen OnePlace Solutions. Engage Squared worked with Sigma Health to deploy OnePlaceMail Desktop and Solution Profiles to bring information to where people work. It satisfied Sigma Healthcare's key requirement to integrate and streamline the process of saving

emails and documents from Outlook into the SharePoint-based legal matter management platform.

Sam Lawson said, "OnePlaceMail was the most cost-effective solution as it focused on our needs, and we were not paying for services we didn't need. Working with Engage Squared to deliver this solution delivered significant benefits."

After implementing OnePlaceMail, Sigma Healthcare began seeing benefits immediately. For example, by managing information more effectively through OnePlaceMail, Sigma Healthcare has made it easier for new hires to hit the ground running, which means they can start to deliver value to the Team sooner. OnePlaceMail lets Sigma Healthcare's Team easily capture, classify, and access information, so it's easy to retain institutional knowledge. This means that, even when knowledgeable staff members leave, new people can come to grips with the legal work that's underway and provide appropriate handovers and reporting.

The result is a more efficient and effective Team that can collaborate effectively to deliver positive outcomes for Sigma Healthcare in a consistent and predictable way.

Sam Lawson said, "Having a flexible and collaborative content management platform lets Sigma Healthcare construct a perfectly tailored and cost-effective resolution. Having a passion for the solution is critical in bringing it to life. The expertise from Engage Squared combined with the capabilities of OnePlaceMail ensured everything ran smoothly."

Commercial people speak a different language to those in IT. Communication is key to any project and Engage Squared took the time to listen and understand our needs."

As organizations expand globally and Remote Teams remain the norm, collaboration has become vital to success. The use of OnePlaceMail reduced business inefficiencies around sharing information, files, and emails across the legal team. This lets the teamwork together seamlessly, with each Team Member

able to instantly access the information they need, when they need it, to ensure legal matters progress smoothly.

The Legal Team has seen benefits using OnePlaceMail that can potentially be realized in other areas across the organization. Sigma Healthcare will potentially roll out the solution across the organization so that other internal Teams can benefit from secure workloads, easy collaboration, and information traceability.

Sam Lawson said, *"The Legal Team has taken the view that what's good for it is good for other parts of the business. We have always tried to build solutions on an enterprise-wide basis, so we plan to roll out OnePlaceMail to more Teams in the future."*

Working together faster is important to an ongoing digital strategy. The integration of OnePlaceMail and SharePoint meant that Sigma Healthcare had efficient record and file management to support future team growth. As new members join the Team, they will be able to start contributing meaningfully to the business sooner due to the ready availability of information and the ease of information sharing. Accessing the business's SharePoint locations directly from Outlook using OnePlaceMail will overcome the delays that can occur when new team members have to be trained from scratch. The intuitive and easy-to-use nature of OnePlaceMail makes it easy.

Sam Lawson said, *"It's a great solution. Emails are so prevalent in modern business, so being able to have a digital copy captured in a way that's searchable and intuitive is a big step in the right direction."*

Clients



Trial Service

The Ideagen Mail Manager Enterprise suite of products has a free trial available for 30 days. We also offer free trials for customers in the instance where some departments are using the solution, and they are looking to expand usage within the business.

Our dedicated Account Management Team are here to help with provisioning a solution trial and discuss next steps in terms of contacts and license purchasing.

Technical Requirements

The prerequisites for running Ideagen Mail Manager Enterprise Desktop are the following:

- Windows 11
- Hardware recommendations:
 - Intel Processor 2.5 gigahertz (GHz) or faster, minimum 2-core
 - Memory 8 GB RAM or greater
 - 1280 x 768 minimum screen resolution
 - Hard disk speed 7200 rpm or SSD
 - Microsoft .NET Framework 4.6.2 or newer
 - Licensed Windows version of Microsoft 365 or Outlook 2019/2016
 - Email Server: Microsoft Exchange Online
 - SharePoint Server: SharePoint Online

For user convenience, these prerequisites should be clearly listed on the Ideagen Mail Manager Enterprise product website and official documentation to ensure customers can easily verify system compatibility prior to installation.

- Windows 11
- Hardware recommendations:
 - ▷ Intel Processor 2.5 gigahertz (GHz) or faster, minimum 2-core
 - ▷ Memory 8 GB RAM or greater

- ▷ 1280 x 768 minimum screen resolution
- ▷ Hard disk speed 7200 rpm or SSD
- ▷ Microsoft .NET Framework 4.6.2 or newer
- ▷ Licensed Windows version of Microsoft 365 or Outlook 2019/2016
- ▷ Email Server: Microsoft Exchange Online
- ▷ SharePoint Server: SharePoint Online
- ▷ Not Supported: ARM Processors

The prerequisites for running Ideagen Mail Manager Enterprise web add-in include:

- ▷ Microsoft Exchange Online (365)
- ▷ SharePoint Online
- ▷ Supported on Outlook for Windows, New Outlook for Windows, Outlook for Web, Outlook for Mac
- ▷ Supported Outlook Web for PC, Windows & Mac.
- ▷ Supported mobile clients: Outlook for iOS, Outlook for Android
- ▷ Supported web browsers: Chrome, Edge, Safari

The prerequisites for running the optional Ideagen Email Tracking Service are:

- ▷ An Azure subscription within the same Microsoft 365 tenant as the mail users (to deploy the service into)
- ▷ Microsoft Exchange Online (365)

Hosting Options and Locations

Ideagen Mail Manager Mail Manager Enterprise does not host any data. We use Microsoft Azure services to process the save for the Ideagen Mail Manager web app, in addition to telemetry and licensing data, using Microsoft Azure services in Australia, with load balancing in US Data Centre.

Data Back-Up and Restoration

The Ideagen Mail Manager Enterprise suite of products for both Cloud and Desktop are stateless applications that do not store any customer data (email/files). Data is not stored at rest while processing content to save to customer locations. All data is stored on the customers contracted storage (e.g., SharePoint.), which each have their own backup policies. As such, Ideagen Mail Manager Enterprise does not need to, and indeed cannot, backup any customer data. Further details can be provided on request.

The Ideagen Mail Manager Enterprise cloud offering is hosted in Microsoft Azure in multiple REST API services utilising Azure serverless resources such as Azure Functions for compute, Azure Service Bus and Queues for messaging, Azure SQL and Cosmos for storage, Azure Front Door for traffic routing and load balancing. The service is designed to auto scale to ensure that any downtime in the service plan is prevented/minimised. As Ideagen Mail Manager Enterprise cloud offering is stateless, the API endpoint calls can be shared to different instances for processing, thus providing high tolerance resilience. 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.

All applications are tested against the OWASP standards. Ideagen developers undertake code reviews and code is subject to penetration testing before release.

Our Software Development Lifecycle Process (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 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!

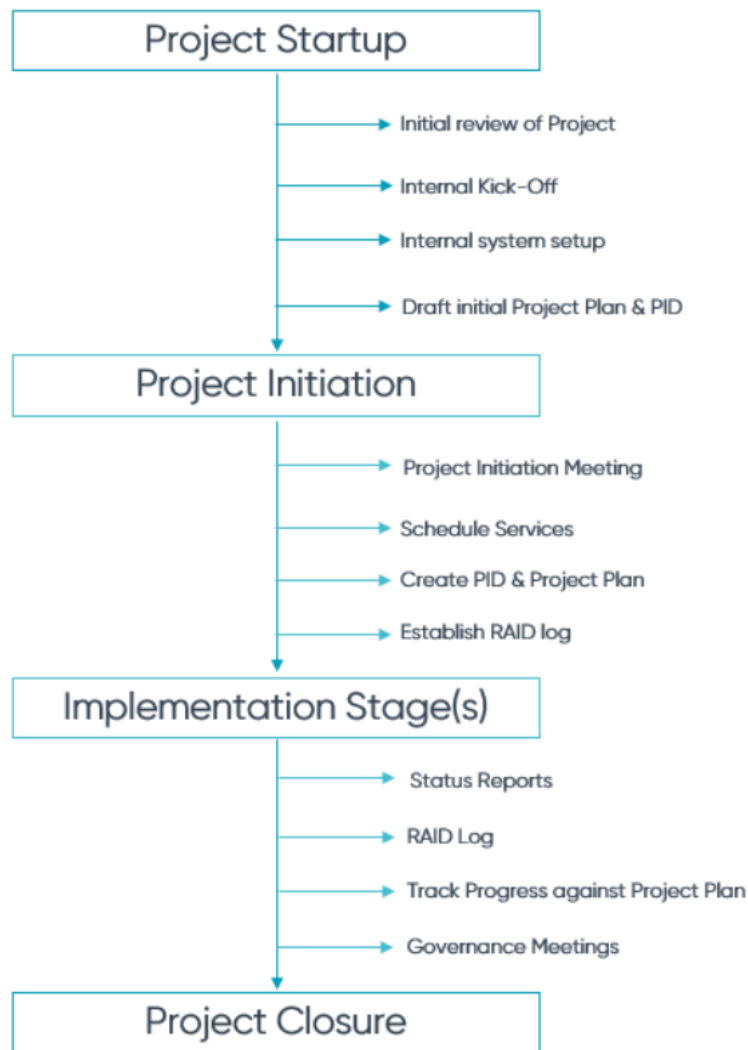
Onboarding and Offboarding

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

Ideagen Mail Manager Enterprise has been available as a cloud service offering since April 2019.

The service has a regular cadence of feature updates and maintenance releases—typically on a quarterly basis.

Users maintain control over updating their desktop installations and may choose to skip any quarterly update.

The desktop version has been available since 2008 and continues to be actively maintained with ongoing upgrades and feature releases.

Outage and Maintenance Management

Being a client add-in rather than a cloud-hosted application, outage and maintenance management are not applicable.

The service was launched in 2019, and regular maintenance updates and enhancements are provided to the service. This includes bug fixes and security updates. The service is typically updated on a Tuesday unless it is critical to do so otherwise.

The desktop version is maintained for bug fixes, security updates and enhancements with typically, a quarterly release cadence. The customer maintains control over when to deploy software maintenance updates and may choose to skip a quarterly update if the update is not relevant to the business needs.

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 hosted environments and its potential impact. If a zero-day vulnerability is discovered,

we will assess its impact to the system and if required patch at the earliest opportunity.

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

Service Levels

Ideagen is committed to delivering high-quality service. Sometimes, routine system maintenance, patching, and updates require occasional planned downtime. 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 Mail Manager Support Service Level Agreement \(SLA\) – Ideagen Mail Manager | 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)

The Ideagen OnePlace Solutions suite of products store emails and documents in the Buyer-controlled SharePoint / Microsoft 365 environment only.

On termination of the Agreement, there is no need to extract or export data as this is stored within your environment.

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.