



Ideagen Enterprise EHS & / or Enterprise Quality Management Software

Service Definition Document

G-Cloud 15

Lot 2b Software as a Service (SaaS)

Table of Contents

Company Overview.....	4
Service Overview	4
Overview of the Service	4
Features and Benefits	7
Outcomes and Deliverables	8
Trial Service	11
Technical Requirements	11
Artificial Intelligence.....	12
Hosting Options and Locations	12
Data Back-Up and Restoration.....	13
Security	13
Information Assurance	13
Privacy by Design	14
Development Life Cycle	15
Buyer Responsibilities.....	15
Onboarding and Offboarding.....	16
Project Management Services.....	16
Training	17
Buyer Service Constraints	18
Outage and Maintenance Management	18

Service Levels	19
After Sales Support	20
Access to Data (upon exit)	20
Contact Details.....	21

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 Environmental, Health, Safety & Quality Management Software: Enterprise is an AI-enabled EHSQ management solution for organizations requiring robust compliance management, comprehensive audit trails and intelligent decision support across their operations.

The software provides centralized management of incidents, audits, inspections, risk assessments, regulatory compliance and quality processes. The system addresses key operational challenges including multi-site coordination,

regulatory compliance across jurisdictions, data consolidation and risk visibility across diverse operations.

Core capabilities include:

Foundation module – administrative tools for configuring and managing the EHSQ system including user management, workflow automation, dashboard management and role-based access controls.

Incident management – reporting, tracking and managing injury/illness, environmental, vehicle, quality and property incidents with AI-assisted root cause analysis and corrective action recommendations.

Audit management – compliance and best practice verification across EHS and quality standards with automated corrective action tracking, configurable audit checklists and comprehensive finding management.

Inspections – systematic oversight of safety conditions, environmental compliance and quality requirements through configurable inspection templates with automated corrective action workflows.

Document control – enterprise document lifecycle management for policies, procedures, SOPs and quality documentation with version control, approval workflows and automated review scheduling.

Risk assessment – systematic identification, analysis and evaluation of operational, safety, environmental and quality risks with AI-assisted hazard identification and configurable risk matrices.

Contractor management – third-party contractor oversight including qualification tracking, performance monitoring and safety compliance verification.

Risk register – centralized organizational risk tracking with assessment workflows, mitigation planning and enterprise-level risk reporting.

Permit to work – digital permit management for high-risk activities with automated approval workflows, qualification verification and activity tracking.

Ergonomics management – workplace ergonomic assessment using industry-standard methodologies including NIOSH Lifting Equation and Strain Index calculations.

Chemical and SDS management – chemical inventory management with centralized Safety Data Sheet library, automated updates and regulatory reporting capabilities supporting UK REACH and COSHH compliance.

Change management – systematic control of organizational modifications with structured approval processes, impact assessment and stakeholder notification.

Claims management – incident response and workers' compensation coordination with third-party administrator integration and case tracking.

Training management – training administration and compliance tracking with automated scheduling, certification management and skills gap analysis.

AI-powered regulatory compliance support – monitoring of regulatory changes with automated gap identification for EHS and quality standards including ISO 9001, ISO 14001, ISO 45001, OSHA and RIDDOR.

Supplier quality management – end-to-end supplier lifecycle management including qualification and approval workflows, performance monitoring, nonconformance tracking and supplier audit scheduling with automated corrective action follow-up.

CAPA management – structured corrective and preventive action processes with automated workflow routing, root cause analysis tools, effectiveness verification tracking and trend analysis to identify systemic quality issues across the organization.

Asset management – equipment and asset lifecycle tracking with maintenance scheduling, calibration management and compliance verification to ensure operational reliability and regulatory adherence.

Complaint management – systematic customer complaint handling with investigation tracking, resolution documentation and trend analysis to drive continuous improvement and maintain customer satisfaction.

Features and Benefits

Ideagen provides AI-enabled EHSQ management with intelligent assistance embedded directly within operational workflows. Rather than requiring users to switch between separate systems or tools, AI capabilities are integrated throughout the platform to support decision-making, automate routine tasks and surface relevant information contextually.

Our AI capabilities

Scale capability and capacity with agentic AI are embedded across the entire Ideagen platform. It doesn't just help you work faster – it helps you work better.

Predict risks, elevate quality, safeguard your workforce, audit at scale and take the pain out of compliance.

AI agents are software that can actually action tasks, not just answer questions. They watch your systems, follow your rules, make decisions you've trained them to make, and only bother you when something actually needs human attention.

Your users stop doing repetitive tasks and start solving real problems. Your systems become self – monitoring. Your compliance becomes automatic. That's the difference between AI tools and AI agents.

The system employs three complementary AI integration methods:

Embedded AI – intelligent features operate within existing workflows, providing automated data analysis, trend identification and decision support at the point of use without requiring separate interfaces or context-switching.

Contextual AI – the system is trained on domain-specific knowledge relevant to EHSQ operations including regulatory frameworks (OSHA, IOSH, ISO 9001, ISO 14001, ISO 45001), industry best practices and organizational policies and procedures.

Pervasive AI – AI assistance is available throughout the platform rather than limited to specific modules, providing consistent intelligent support across all EHSQ activities.

Platform capabilities:

No-code configuration – configurable screens, forms and workflows that can be modified without IT involvement or custom development.

Integrated architecture – native integration across quality, safety, asset and work management modules with open REST API for connection to external systems of record.

Enterprise-grade security – ISO 9001 and ISO 27001 certified with granular, record-level access control capabilities.

Search and reporting – intelligent search with natural language query processing across all content including attachments, with ad hoc reporting, charting, trending, analytics and configurable notifications.

Configurable workflows – automated task assignment and routing across EHSQ processes.

Complete audit trail – comprehensive tracking of all workflow assignments, approvals and record modifications.

Collaboration – sharing of reports, charts and dashboards across roles and teams.

Personalized dashboards – role-based views showing relevant tasks, metrics and alerts.

Outcomes and Deliverables

Ideagen enables organizations to reduce workplace incidents, improve compliance adherence, consolidate fragmented systems, enhance auditability and derive actionable insights from EHSQ data.

Demonstrated customer outcomes:

Yokohama Tire Corporation achieved a 235% improvement in Incident Management CAPA closure rates over six years, reduced Recordable Incident Rate by 62% within two years and improved Audit CAPA closure rates by 1,200% in one year. The solution provided real-time monitoring of safety protocols, streamlined compliance procedures and centralized data management.

Dawn Foods recorded a 32% reduction in Recordable Incident Rate within one year, 46% reduction in lost time case rate, 68% reduction in restricted duty incident rate, 339% increase in near miss per recordable, 130% increase in near miss investigations completed within 24 hours and 175% increase in on-time closure of CAPAs. The mobile-first solution significantly improved workforce engagement in safety initiatives.

ScottsMiracle-Gro achieved a 40% reduction in Recordable Incident Rate over five years, 25% reduction in work-related claims over five years, 113% increase in incident investigations completed within 24 hours and 126% increase in near miss reporting rate. The unified platform improved efficiency and enabled better identification of risk across the organization.

Johnson Controls International recorded a 40% increase in audit CAPA on-time closure rate over three years, 57% increase in findings on-time closure rate, 37% reduction in DART rate, 28% reduction in work-related claims, 547% reduction in high-risk hazards within one year and 64% reduction in notices of violations. The globally integrated program transformed siloed EHS management activities across 3,500 locations in 74 countries.

AmeriQual Group replaced inconsistent manual processes with an enterprise-wide system, achieved instant communication and notification when incidents are reported, established consistency in incident reporting to provide better data for analytics, engaged shop floor employees in safety initiatives, ensured 100% compliance with OSHA recordkeeping and provided real-time visibility of risk with centralized information management.

Quaker Houghton consolidated disconnected EHS, quality assurance and sustainability systems into a single integrated platform, digitized manual processes for monitoring and collecting sustainability data, provided real-time visibility to safety and quality assurance information reducing risk of injuries and financial liability and created transparent task assignments across global operations. The solution supported the company's recognition in Newsweek's "America's Most Responsible Companies 2022."

Arizona Public Service delivered each solution within the targeted 100-business day project deadline and increased operational efficiency through automated workflow, improved awareness through enhanced reporting and notifications, strengthened accountability with due dates and completion tracking and improved safety performance through OSHA events management. The utility has achieved regulatory compliance every year since implementation.

Idaho National Laboratory achieved increased CAS system usage, significant time savings for line workers when reporting issues, reduced administrator time generating reports through automated notifications, increased management engagement in workplace observations, reduced number of overdue corrective actions, greater manager visibility into work and resource utilization and simplified work processes mirrored with application workflows.

Common outcomes across implementations:

- **Incident reduction** – intelligent root cause analysis, automated corrective action recommendations and pattern recognition across incidents and quality issues that identifies emerging trends before they result in serious incidents or regulatory non-compliance.
- **Compliance adherence** – automated tracking and alerting for regulatory requirements across multiple frameworks including ISO 9001, ISO 14001, ISO 45001, OSHA, RIDDOR and industry-specific requirements, with gap identification and remediation tracking.
- **Operational efficiency** – systematic risk assessment across safety, environmental, quality and operational domains with AI-assisted hazard identification, configurable risk matrices and centralized risk register providing enterprise-level visibility.
- **Streamlined processes** – structured audit planning and execution with intelligent finding categorization, automated corrective action tracking and compliance verification across EHS and quality standards.
- **Enhanced visibility** – consolidated dashboards and analytics providing real-time visibility into safety performance, environmental compliance,

quality metrics and audit status across the organization to support both operational management and strategic decision-making.

Customer success

For additional case studies and detailed implementation information, please visit:

[Customer success stories](#)



Trial Service

We offer a time limited, managed trial service for customers, providing access to a sandbox environment for hands-on evaluation purposes.

Please contact g-cloud@ideagenplc.com and a member of our Pre-Sales Team will be in touch to discuss your requirements in further detail.

Technical Requirements

The solution is SaaS-based (Software as a Service), meaning it can be accessed from anywhere using an internet-connected device – whether it's a desktop computer, tablet, or mobile phone.

The solution works with any recent, standards compliant browser and is fully supported on the latest 2 versions of:

- Google Chrome for Windows
- Mozilla Firefox for Windows
- Safari for Mac
- Microsoft Edge

Also, the solution offers both a dedicated mobile app and a mobile-optimized web interface, ensuring flexibility and accessibility across devices. Mobile capabilities are fully supported on the iOS and Android platforms, offering features such as offline access, real-time data synchronization, and secure user authentication.

Client-Side Software: JavaScript must be enabled in your browser.

Artificial Intelligence

Ideagen leverages artificial intelligence (AI) to deliver secure, compliance-focused solutions for regulated industries. Our AI capabilities are seamlessly integrated into our platforms, enabling intelligent automation and actionable insights while upholding transparency and governance. We ensure that AI enhances efficiency without compromising safety, quality, or compliance.

Hosting Options and Locations

Client instances will be deployed where geographically relevant. Ideagen offer deployment options in the EU with other locations planned. 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

Most unexpected issues in the operating environment are routed around automatically using the High Availability architecture in the same datacentre. However in the unlikely event of a disaster that prevents operations to continue in the primary datacentre, Ideagen will recover the production applications in its secondary datacentre.

Ideagen ensures full and verified DR backups of the customer instance are made on a regular basis using a variety of strategies, including onsite backups to disk, as well as immutable copies stored off-site in the secondary datacentre.

Ideagen backs up Customer end-user generated data at least hourly and static files and underlying systems at least daily. Ideagen keeps DR backups for two weeks and can restore data from backup within a timeframe appropriate to the severity and circumstances of the situation.

Ideagen maintains a documented Business Continuity and Disaster Recovery (BCDR) Plan, tested annually with all findings tracked through to corrective action. Testing scenarios cover critical situations including Availability Zone failures and 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](https://www.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.

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.

Our Software Development Lifecycle (SDLC) document forms part of our ISO27001: 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

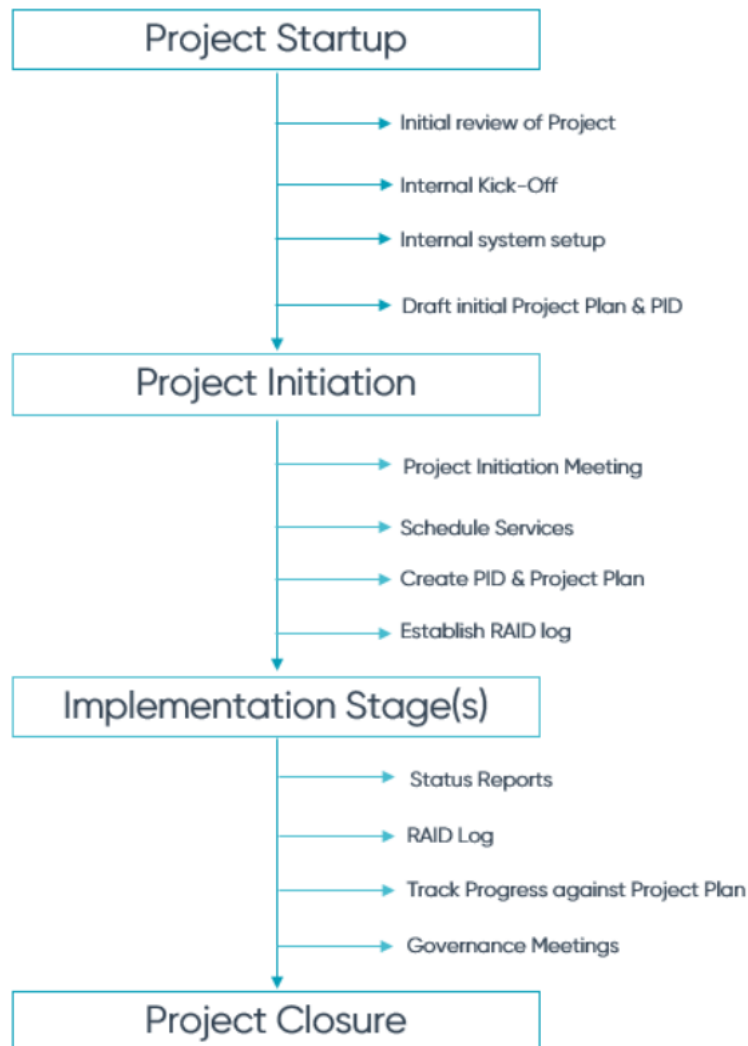
Project Management Services

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

emphasis 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

All updates arrive in the customer test area one week before they arrive in production areas and all changes are published in release notes to allow customer testing and review prior to a release.

Most items within a release are automatically delivered without the option to opt in or out. However, on occasion, when new features or functionality will have potentially large impacts on customers (e.g., wholesale architectural changes or major UI revisions), those features are gated behind feature flags. Some features require back-end feature flags to be enabled. In these cases, we communicate with each customer and develop a plan and timing for enabling the feature, including setting it up in first in a test area for verification. Other features are gated behind a user-enabled feature flag that users can easily toggle on or off as desired.

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 solution supports zero-downtime updates, ensuring uninterrupted access during software patches and upgrades.

For Ideagen hosted customers, we provide regular platform releases (typically every 3 weeks) with the latest security updates or patches, along with new features or other bug fixes.

Customers are invited to participate in pilot testing and provide feedback before production updates.

All updates arrive in the customer test area one week before they arrive in production areas and all changes are published in release notes to allow customer testing and review prior to a release.

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 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

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 EHSQ Support Service Level Agreement \(SLA\) – Ideagen EHSQ • Enterprise | Help | Ideagen Luminate](#)

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 Customer 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)

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 Quality Management • Professional Service Level Agreement \(SLA\) – Ideagen Quality Management • Professional | Help | Ideagen Luminare](#)

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.