



Ideagen Collaboration Portal

(formerly known as Huddle)

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

Service types

- **Ideagen Collaboration Portal Official:** Adds additional levels of security (e.g., Domain Whitelisting) when sharing Official Sensitive content with stakeholders external to your organisation. Also adds task management functionality and enhanced customisation options.
- **Ideagen Collaboration Portal Official ELA (Enterprise Licence Agreement):** For organisations that require additional levels of support, technical

integrations, and customisation. An ELA plan also provides unlimited storage and workspaces, and free licenses for external users (outside of your organisation).

File Sharing

- Upload multiple files into a Workspace and add new files at any time.
- Preview files without downloading / opening them.
- Store and share any file type (including Microsoft Office documents, PDF, images, audio, and video etc).
- Easily create your own folders and safely share Official Sensitive documents outside of your organisation (firewall) – including with private sector partners.

Collaboration

- Start discussions with other Team Members, and keep conversations in a secure, central space.
- Co-edit documents (requires O365 licence) with colleagues and partners.
- Automatic version control maintains a single source of truth and ensures everyone is accessing the latest document version.
- Customisable / branded workspaces.
- Document approval workflow.

Document Management

- Sort files and folders by title, date modified, approval status and more.
- Easily search and find your files. Ideagen Collaboration Portal even searches document content to get you to the files you need quicker.
- Manage file access (e.g.: restrict to read only), and lock files for editing to avoid conflicting changes.
- Audit trails added every time an action takes place against a file.

Mobile / Remote Working

- Supported by dedicated mobile apps (iOS and Android) to make it easier for remote Team Members to stay in touch with their teams and access (and submit) documents.
- Perfect for site inspections and audits.

Integrations

- Integrates seamlessly with Microsoft Office applications (including O365 Office Online).
- Edit documents stored in Ideagen Collaboration Portal directly in your native Office apps. Save and sync back to Ideagen Collaboration Portal with a single click. Co-edit documents (requires an O365 license).
- Upload email attachments and automatically invite Members of an email thread to your workspace.
- API-first strategy allows integration with legacy and 3rd party systems (i.e., SharePoint and other document management systems).
- Build your own workflows and integrations between apps (requires Microsoft O365 / Power Automate license).

User Controls

- Set granular permissions against a workspace or folder, controlling who can view or edit items.
- Easily remove users from a workspace.
- Group Users into Teams (i.e., internal, and external teams) and assign different access rights.
- Control who can invite other Users to a workspace.
- Single Sign-On (SSO) for added security and a better user experience.
- Supports 2FA via SMS.
- Control access to Ideagen Collaboration Portal by whitelisting user email domains.

Project Management

- Assign tasks (and benefit from auto reminders).
- Set file approvals (with automatic reminders).
- Track progress and milestones.
- Keep all documents relating to your project in a single, controlled space.
- Personalised dashboards show you everything you need to know at a glance (latest activity, changes, approvals, comments etc).
- Invite external partners to participate in your project.
- Audit trail maintains a history of all user and file activity.

Applications & Integrations

- **Mobile Apps:** Use Ideagen Collaboration Portal's native Android and iOS apps to access and work on your files, share ideas, manage approvals, and set tasks while on the move. Integration with MDM providers ensure your company and client data remain secure.
- **Ideagen Collaboration Portal for Windows & Mac:** Ideagen Collaboration Portal's desktop apps for Windows and Mac provide fast and easy access to recent and bookmarked files, offline files, and Workspace folders. Files can be uploaded straight to the system from your desktop, open documents stored in Ideagen Collaboration Portal straight to your desktop apps, work offline, and more.
- **Ideagen Collaboration Portal for Microsoft Office & Outlook:** Ideagen Collaboration Portal Desktop also integrates with Microsoft Office (including O365 / Office Online) to bring added collaboration features to your favourite productivity tools. Open documents stored in Ideagen Collaboration Portal into Microsoft Office – co-edit, view and add comments, then sync back to Ideagen Collaboration Portal seamlessly. Ideagen Collaboration Portal's easy-to-use plug-ins also work with Microsoft Outlook, allowing you to quickly save emails and attachments into your Ideagen Collaboration Portal Workspaces.

- **Ideagen Collaboration Portal for G-Suite:** Ideagen Collaboration Portal's add-on for Google Apps means you can use Google for what it's best at, creating content and co-authoring with your colleagues. Once you're ready to share and collaborate on your work externally, you can publish from Google Docs and Sheets straight to Ideagen Collaboration Portal in PDF, Word, Excel, or CSV formats.
- **Build your own Automations and Workflows:** Use services such as Microsoft Power Automate to connect Ideagen Collaboration Portal with existing apps and build automations and workflows. For example, notify users about Ideagen Collaboration Portal notifications or file updates by sending alerts to Slack / Microsoft Teams channels.
- **Others:** Ideagen Collaboration Portal seamlessly integrates with popular enterprise productivity tools such as SharePoint and Salesforce.com as well as supporting Single-Sign-On to improve security and convenience. Full API access for more complex integrations with existing systems.

Included within your contract is:

One initial training session and online guidance documents and training videos.

The following services are available for an additional fee as outlined in our pricing document:

- Branding (included as standard within the ELA offering).
- Additional storage.
- Additional EXTERNAL users.
- Ideagen Collaboration Portal API Access.
- SSO configuration – included as standard within the ELA offering.

Professional services are charged at a day or half day rate dependent upon the client's requirements as shown in the pricing document.

See Ideagen Collaboration Portal in Action!

<https://play.goconsensus.com/sf0b6883c>

Features and Benefits

Share and manage documents, coordinate multi-agency projects, work with external partners, government departments and public sector organisations. Reduce risk and improve security.

- Improve organisational effectiveness
- Improve and increase cross-agency collaboration
 - ▶ Securely collaborate on projects with other agencies and external contractors
 - ▶ Ensure all parties are operating from a single source of truth
 - ▶ Track and report on project progress
- Increase the efficiency and effectiveness of Government Inspections
 - ▶ Securely gather agency information
 - ▶ Conduct reviews of gathered materials
 - ▶ Collate and share findings
 - ▶ Track and report on inspection progress
- Optimise ROI on supplier / partner relationships with effective controls
 - ▶ Ensure suppliers and partners are delivering on time, on target
 - ▶ Share common assets, review, and collaborate on proposals or project deliverables
- Increase confidence and reduce risk
 - ▶ Eliminate the use of unsanctioned and insecure information sharing
 - ▶ Significantly reduce the risk of confidential data loss
 - ▶ Adhere to supplier and partner management policies and procedures

Ideagen Collaboration Portal allows Teams to share, collaborate and work on documents (Official Sensitive) internally and externally across the firewall with other departments, agencies, and even private sector partners. UK data residency is guaranteed. Ideagen Collaboration Portal also holds several UK and

Global Security Accreditations to ensure your documents remain secure at all times.

- **Secure File Sharing:** Remove risks and replace insecure file sharing tools and email.
- **Ideagen Collaboration Portal meets the Official Government Security Classification** to provide a highly secure way to share, manage and publish documents across internal teams and external stakeholders. Keep users synchronised to the latest version, lock documents, manage approvals and keep track of document activity from your desktop and mobile devices.
- **Multi-Agency & Panels:** Simplify and drive effective efficient multi-agency working. Enable teams to work together in a secure, shared environment. Remove the challenges of coordinating multi-agency projects. Keep teams and panels synchronised, documents secure and projects on track with complete control.
- **External Collaboration & Supplier Management:** Ideagen Collaboration Portal provides a secure, shared environment, allowing you to work confidently with suppliers and partners. Robust security controls, audit trails, and permissions keep your Official Sensitive data secure. Reduce risk when sharing and collaborating externally – including managing private sector tenders and contracts.
- **Inspections:** Simplify field work, Ideagen Collaboration Portal allows inspectorates and the organisations they engage with to submit and fulfil document requests, collaborate on content, track document activity, and manage access from their desktop or mobile devices.
- **Rapid deployment:** start using Ideagen Collaboration Portal within days. Set up users and start collaborating and sharing information securely within seconds.
- **In-Built E-Signature:** Manage the signing of contractual and other documents by internal and external parties using customisable workflow, avoiding the need to leave Ideagen Collaboration Portal or invest in expensive third-party solutions.

- Fully integrate with Microsoft Office and Office Online (Excel, Word, Outlook, and PowerPoint).

"Of all the cloud-based systems we looked at, only Ideagen Collaboration Portal offered the type of security that wasn't just important but mandatory." - Homes and Communities Agency

Outcomes and Deliverables

Key benefits of using Ideagen Collaboration Portal:

- Manage documents, revisions, approvals, and discussions all in one place.
- Create engaging client portals where your Teams, Partners and Clients can securely work together.
- Secure file sharing with anyone, both inside and outside of your organisation.
- Automatic document version control, task management, file request and mobile functionality keeps projects on track and within budget.
- In-built e-signature feature allows you to complete the document lifecycle or manage contractual documents without leaving Ideagen Collaboration Portal or needing to invest in costly alternative software.

University College London Hospital National Health Service Foundation Trust (UCLH)

Before Ideagen Collaboration Portal, UCLH project teams often lacked confidence that they were working on the latest document versions. Relying on email made it difficult to track updates, share large CAD/BIM files, and coordinate edits across increasingly large project groups.

UCLH's Capital Investment team oversees major construction and equipment projects across the Trust. These projects involve constant sharing of plans, designs, and documentation, which the old email-based process struggled to support.

"Traditionally we used email to share information, but with the volume of files and people involved, distribution became challenging," says Olivia Mulholland, Construction Contractor and Information Manager. "It was extremely difficult to keep track of which was the current version of a file."

Ideagen Collaboration Portal now provides fast, reliable access to large files, clear version control, and complete audit trails. *"With Ideagen Collaboration Portal, we can share large files easily, and everyone is absolutely sure they are seeing the correct information,"* Mulholland confirms.

Audit trails and approval records are essential for compliance-heavy areas such as asbestos disposal, and activity tracking gives Project Managers instant visibility of who has accessed project files.

A major example is the Proton Beam Therapy Centre project, where around 40 team members collaborate daily in a dedicated workspace to share and edit drawings, documents, and designs.

Alongside project workspaces, UCLH has also created a general workspace to house all departmental policies and procedures, giving new staff and contractors a single place to access essential information.

"The greatest benefits are accessible file storage, automatic auditing, and the ability to share information instantly," says Mulholland. *"Public links and external sharing are incredibly useful, and feedback from our 300+ users has been overwhelmingly positive. Ideagen Collaboration Portal has made reporting far easier and has improved both transparency and accuracy across our Team."*

The Commonwealth Secretariat

The Commonwealth Secretariat is the central agency supporting cooperation between 54 Commonwealth countries, helping governments collaborate on policy, development, and shared goals. To strengthen engagement between government representatives, civil society, and youth networks, the Secretariat

needed a simple, reliable platform for ongoing collaboration beyond face-to-face meetings.

"We work with high-level government representatives across the Commonwealth, so effective collaboration is essential," says Pukul Rana, Digital Strategy Advisor. "Our concern was how to continue the dialogue between meetings. We needed a platform that was easy to use, robust, and able to handle varying connectivity and IT literacy."

Ideagen Collaboration Portal's web-based access, discussion forums, whiteboards, and mobile apps provide an intuitive way for users to share knowledge and work together from anywhere. Before Ideagen Collaboration Portal, a bespoke system failed to meet user needs, and many reverted to email, which often led to duplication, lost documents, and inefficient communication.

Security was also critical. Ideagen Collaboration Portal's IL2 accredited environment gives the Secretariat confidence that only approved users can access sensitive materials shared with ministers, partner organisations, and youth networks.

After evaluating the market and running a formal tender, the Secretariat chose Ideagen Collaboration Portal for its ease of setup, pricing, and strong commitment. *"The total package had far more potential than its counterparts,"* says Rana. Today, more than 900 users collaborate across over 85 Ideagen Collaboration Portal workspaces, including groups such as the Disability Rights Protection Network.

"Ideagen Collaboration Portal is integral to what we do and a key part of our online proposition," Rana adds. "It has increased productivity, improved efficiency, and helped us shift towards online working."

Looking ahead, the Secretariat will continue using Ideagen Collaboration Portal to connect professionals across sectors and time zones, test mobile working

approaches, and drive wider digital collaboration initiatives across the Commonwealth.

Clients



Trial Service

We offer a time limited, managed trial service for customers, providing access to a fully functioning workspace within Ideagen Collaboration Portal.

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

Technical Requirements

Ideagen Collaboration Portal works with any recent, standards compliant browser with the latest two released version and is fully supported on the following:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

➤ Safari for Mac

No plugins needed to Ideagen Collaboration Portal on the web.

Ideagen Collaboration Portal Desktop: Microsoft .NET 4.5.2

Ideagen Collaboration Portal Mobile: Both latest versions of iOS and Android are available on their respective stores and will continually be updated there.

Hosting Options and Locations

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

Data Back-Up and Restoration

As Ideagen Collaboration Portal is a business-critical web application, we employ two separate external monitoring systems to track and record availability and response time from various locations around the globe. We have a 24x7 Team available to respond in the unlikely event of a serious application issue. Ideagen implement redundancy in every part of the system, coupled with careful quality assurance and change management.

This redundancy applies to everything from power and network connections into AWS data centres, firewalls, load balancers, switches, web servers, database servers. Each server has redundant NICs, and all hard drives are configured in RAID 1 or RAID 5 arrays with a hot spare.

There is a documented BCDR Plan for the service which is tested at least annually. Findings from BCDR testing are tracked to ensure corrective measures

are implemented. The plan includes various scenarios such as loss of an Availability Zone and loss of a critical AWS service which impacts the availability of the service. Testing involves multiple teams within the business to ensure it is as realistic as possible. Further details can be provided to the buyer on request.

Security

Information Assurance

Ideagen maintains a suite of Corporate Security Policies cover the management of security for both its internal operations as well as the services Ideagen provides to its Buyers, and applicable to all Ideagen Employees as well as any relevant Third Parties and Stakeholders. These policies, which are aligned with the ISO/IEC 27001:2022 standard to which Ideagen is externally Certified, govern all areas of security applicable to the services. All Policies are formally reviewed and signed off by Management at least annually or on significant change, in line with our ISO 27001 Certification.

Additionally, Ideagen is certified under both Cyber Essentials and Cyber Essentials Plus. A comprehensive overview of Ideagen Policies, Standards, and Procedures, can be supplied upon request.

The information security of the business is currently overseen by our VP Global Cyber Security, who works closely with our IT Teams, our Product Managers and our Group DPO to ensure that all Technical and Organisational Measures are in place and maintained. Ideagen utilises the Microsoft Azure, M365 product suite and AWS cloud services and therefore has the benefit of the Microsoft and Amazon infrastructure and controls.

Privacy by Design

Ideagen has embedded privacy by design principles throughout its product and development lifecycle, prioritising the protection of User data throughout all

processing activities. The service implements core privacy principles including data minimization, purpose limitation, and privacy by default, ensuring Users benefit from the highest privacy settings without additional configuration.

The service employs strong encryption and granular access controls to ensure Buyer Data remains secure. Privacy safeguards are integrated from initial design through to data deletion, with regular privacy reviews conducted as features evolve.

Ideagen has appointed a qualified and certified Data Protection Officer who oversees data protection compliance across the organisation and is registered with the Information Commissioner's Office in the UK.

Full details are available in [Data Protection Policy | Safeguarding your privacy](#)

Development Life Cycle

Ideagen's solution embeds Information Security at the core of its System Development Lifecycle (SDLC) policies and processes. All services are developed with stringent OWASP Web and Mobile Top-10-derived industry-standard practices.

The Ideagen Collaboration Portal's Product Engineering Team follows an iterative Agile software development methodology to build the product.

In addition to our in-house built automated test frameworks, we perform Static Code and Dynamic Code Analysis on the Ideagen Collaboration Portal web front end. Any issues identified are reviewed by Developers or Cloud Operations, and confirmed threats are logged in Jira as live bugs, prioritised by the responsible team for resolution.

Ideagen operates a global Information Security Management System (ISMS) designed to safeguard information assets and enforce robust security controls. This ISMS, which includes most controls required for the Ideagen Collaboration Portal's FedRAMP Moderate instance, is verified by URS. This confirms Ideagen's adherence to the ISO/IEC 27001:2103 standard, while also including many of the

NIST 800-53 controls. Additionally, Ideagen Collaboration Portal's Global instance is certified under Cyber Essentials Plus, audited by 6 Degrees.

We have available Ideagen Collaboration Portal – System Development Lifecycle document which defines how security considerations are addressed throughout the lifecycle and the roles and responsibilities of team members to ensure the process is carried out.

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!

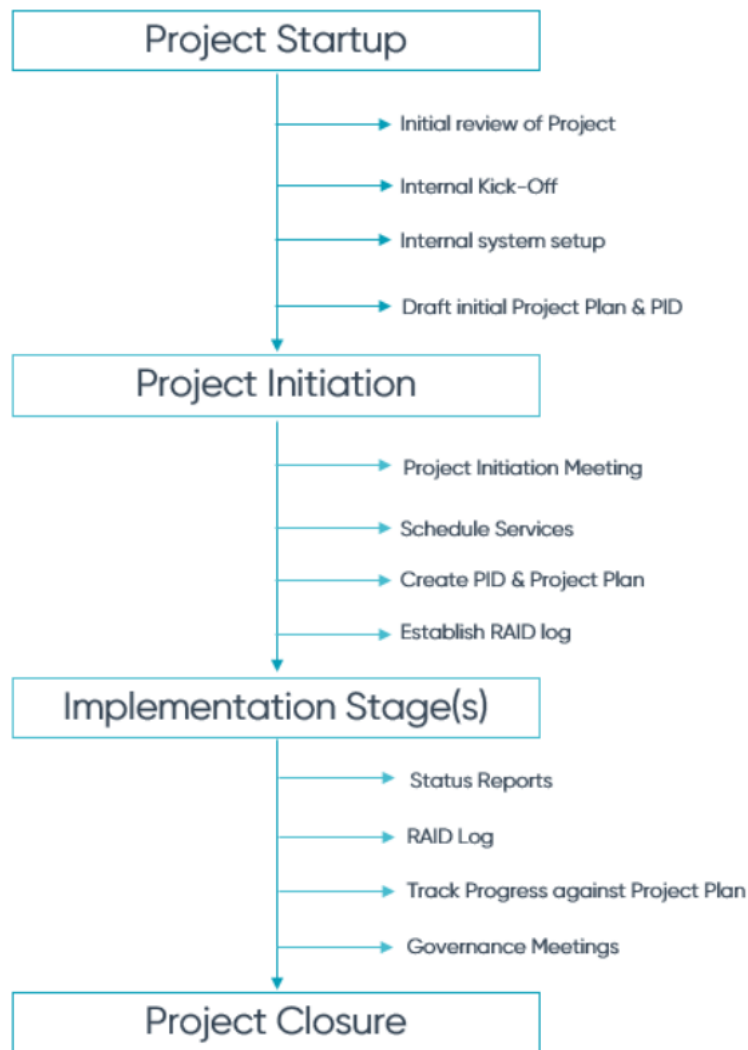
Onboarding and Offboarding

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

The solution follows a continuous deployment model, meaning new updates are deployed as soon as they are ready, without a fixed schedule.

Users receive updates automatically if they have an active subscription. Release dates and the features included in each update may vary depending on the development cycle and testing outcomes.

Updates are normally scheduled outside working hours and the customer will be given prior notice to any scheduled downtime.

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 follows a continuous deployment model, meaning new updates are deployed as soon as they are ready, without a fixed schedule.

Release dates and the features included in each update may vary depending on the development cycle and testing outcomes. Release notes will be communicated 2 weeks in advance before 'go live' of a new release.

Updates are normally scheduled outside working hours and the customer will be given prior notice to any scheduled downtime.

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.

Ideagen implement redundancy in every part of the system, coupled with careful quality assurance and change management.

This redundancy applies to everything from power and network connections into AWS data centres, firewalls, load balancers, switches, web servers, database servers. Each server has redundant NICs, and all hard drives are configured in RAID 1 or RAID 5 arrays with a hot spare.

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

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 Collaboration Portal Success Plans Support Service Level Agreement \(SLA\) – 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.