

Info Exchange (IEX)

Product and Services Description



Info Exchange offers secure, flexible SaaS applications for Health and Safety, as well as Governance, Risk, and Compliance. Combining advanced technology with expert insight, Info Exchange helps organisations mitigate risk and protect their people. It is fully configurable, letting you digitise and manage processes through a powerful workflow engine. By connecting data across workstreams, Info Exchange can streamline your operations and replace scattered systems, paperwork, and spreadsheets.

Contents

Solution Overview	3
Key Features	4-5
Benefits	6
Service Summary	7-9
Onboarding & Implementation	9-10
Service Management & Support	11
Security & Data Protection	11-12
Service Availability & Performance	12

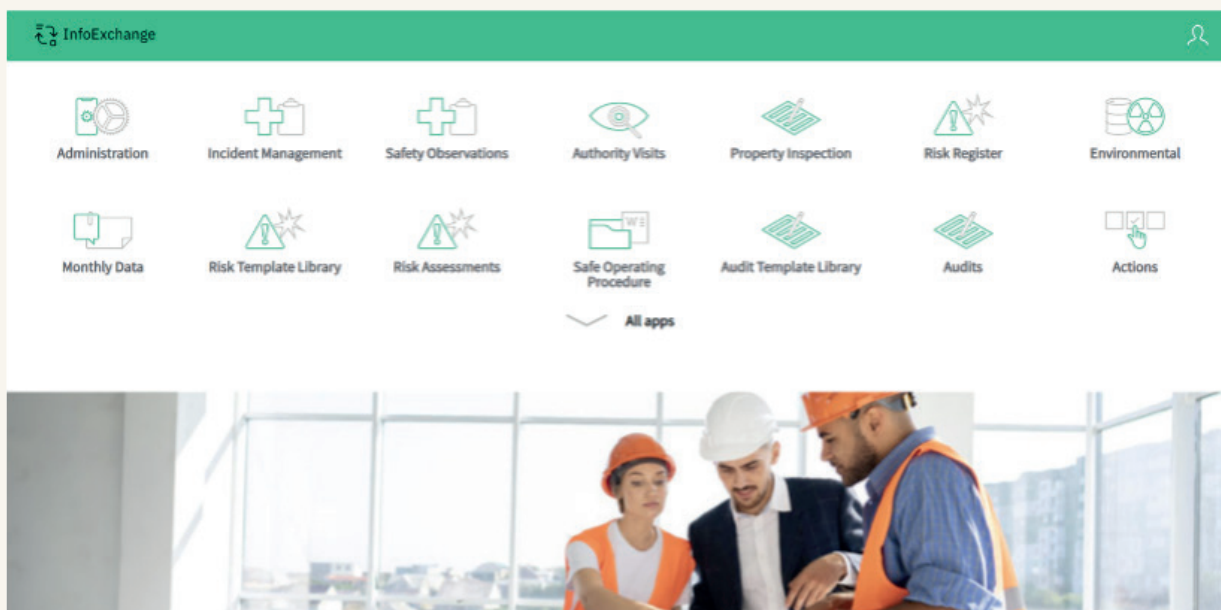
Disclaimer: Information correct as of January 2026. Please refer to our live G-Cloud 15 listing profile for the most up-to-date product and service details.

Solution Overview

EcoOnline Info Exchange (IEX) specialises in delivering secure SaaS solutions for Health and Safety, Governance, Risk, and Compliance.

The software, combined with expert knowledge and collaborative, creative problem-solving, improves outcomes for organisations and protects the lives of their staff by mitigating risks.

Info Exchange is a highly configurable and adaptable solution that empowers you to automate your processes and streamline them through an efficient workflow engine. The true potential of Info Exchange lies in its ability to seamlessly integrate data from various sources and operations. Info Exchange can be easily integrated into your existing processes and can eliminate the need for scattered systems, traditional paper-based methods, and multiple spreadsheets or SharePoint sites.



Key Features

The following features are applicable to all Info Exchange modules.

Core Functionality

Your solution will come with the following core functionality:

- Workflow processes
- Action management
- E-mail notification
- Advanced search
- Dashboards and reporting
- Powerful user administration
- Integrated data search
- Strong security permissions and administrative controls
- Integration with your current systems, which allows data-feeds to and from internal systems (paid add-on based on type and number of integrations)

Dashboard and Reporting Capability

The powerful Report Builder module within the system will enable you to generate bespoke reports based on any combination of data fields within the system over any user-defined period. Report Builder training will be provided to you, to ensure your designated users have the capability to create their own bespoke reports post Go-Live. The Report Builder module allows users to search for any field within the system, perform calculations, aggregate data and generate various graphical outputs, including:

- Pie charts
- Column and bar charts
- Various line graphs options

All of which are configurable by range and frequency, allowing you to conduct your own trend analysis. In addition, formatted text fields can be incorporated within the report output to produce an Executive Summary, and reports can be combined to provide a Corporate-level report. Your reports can be exported in CSV, XML and PDF formats out of the system and can be generated manually or via scheduled reporting with configurable frequency, in conjunction with a configured e-mail notification.

Easy to Use

All forms within our system are intuitive and easy to use without any formal training to support and encourage reporting by all employees. To ensure quality and consistency of data, Info Exchange uses the following wherever possible:

- Calculated fields
- Automatic population of data
- Mandatory fields
- Drop down list instead of free text
- Imports of data such as employee names

Flexible for a growing organisation

The system is specifically designed to support quick and efficient configuration of an organisation's structure, with no limits placed on size and complexity. Info Exchange offers an unlimited licence model to ensure that new people can be added as users to your system and new user groups set up at any time by your trained Systems Administrator. There are no limits on concurrent use, which further encourages engagement with the system.

Remote Forms

Remote Form versions are included as part of the system enabling non-registered users, (for example your supply partners or sub-contractors) to input data into the online system. The Remote Forms can be accessed via any internet connect device with a HTML 5 compatible browser (this includes mobile devices).

Languages

Info Exchange is multi-lingual and is available in over 28 languages.

Ability to Assign and Track Actions

Action management in our system is so vital, that our solution comes with its own Action Application to hold all actions from your chosen modules. All Actions are assigned either manually to the accountable stakeholder or automatically assigned through your relevant User Groups. Designated individuals will be able to have visibility of all actions across all your chosen applications and manage all actions in one area, regardless of source.

Process Workflow

Our powerful workflow tool allows the configuration of workflows, specific to you. Workflows can incorporate any number of steps, such as: E-mail notifications, creating actions and generating alerts based on specified timelines for each step to be completed, etc. Any number of different workflow processes can be uniquely configured into your system. Workflow summary dashboards or reports can be configured to show the progression of each workflow through each stage. All actions within our system have an audit trail, which your designated administrators can interrogate at any time.

Benefits

Module	Benefits
Accident, Incident and Event Management	Capture any type of incident – accidents, near misses, adverse events, unsafe conditions – through highly configurable forms and automated workflows, including for non-registered users. Conduct tailored investigations, assign actions, and maintain full audit and version trails, while dashboards surface trends and root causes to drive prevention.
Competency Management	Map role requirements to training and competency needs, with automated assignment, expiry tracking, and evidence storage. Provide clear visibility of workforce readiness through dashboards, alerts, and audit-ready records.
Asbestos Information Management	Maintain a central, up-to-date asbestos register with survey data, risk ratings, and planned remediation. Provide read-only contractor access to ensure safe working and full compliance with regulatory requirements.
Asset Management	Manage asset records, condition data, and maintenance schedules in one controlled environment. Automate PPM tasks, track reactive work, and monitor costs and performance through real-time dashboards to extend asset life and reduce downtime.
Audits and Inspections Management	Standardise audits, inspections, and checklists with configurable templates and mobile evidence capture. Automatically generate actions, track close-out, and benchmark performance with site and organisation level reporting.
Project and Programme Information Management	Provide a structured environment for managing your organisation-specific project documentation, approvals, workflows, and change control. Submit regular project updates and automatically flag where milestones or RAG changes between updates.
CAFM (Computer Aided Facilities Management)	Manage all planned and reactive maintenance, remedial action management and asset register through a FM Helpdesk.
NCR and Action Management (Quality)	Log non-conformances, manage investigations, and implement corrective and preventative actions through configurable workflows with full traceability. Link issues to suppliers, processes, or projects, and monitor closure performance through quality dashboards.
Fleet	Centralise vehicle, driver, and compliance data with proactive monitoring of inspections, defects, and maintenance schedules. Improve safety and cost efficiency with real-time visibility of compliance, incidents, and lifecycle status.
Claims	Extend your Incident Management process by capturing, assessing, and managing claims that arise from recorded events – such as injuries, property damage, or thirdparty incidents. The module links directly to incident records to streamline evidence collection, track financials and recovery actions, and provide a complete, endtoend view from initial incident through to claim resolution, even sharing key information with third-parties, e.g. your insurer.
Loss Prevention/ Security Incident	Record security incidents, theft, and breaches with integrated action tracking and investigation workflows. Analyse patterns across sites to strengthen controls and proactively reduce loss and security risk.
Property Compliance	Consolidate all statutory obligations – fire, water, gas, electrical, and building safety – into one compliance register. Automate inspections, certification uploads, and expiry alerts to ensure no required activity is missed and compliance can be evidenced instantly.
Risk Assessments	Digitise risk assessments with configurable templates and dynamic scoring. Allocate controls, monitor residual risk, and automate review cycles to ensure assessments always remain current and compliant.
Risk Management	Maintain a structured organisational risk register with ownership, controls, and mitigation plans. Monitor KRIs, escalate concerns, and report risk exposure with clear roll up visibility across teams, business units, and the enterprise.
Workplace Occupational Health	Manage health surveillance, case files, and fitness for work decisions securely and confidentially. Track exposures, assessments, vaccinations, and referrals, with insights that help organisations protect workforce health and wellbeing.

Service summary

What is included

- Selected modules and add-ons
- Full service implementation support (described below)
- Implementation hub access” enablement and access to virtual content and implementation resources

Optional add-ons

Historical Data (Data Migration)

Importing historical data into EcoOnline IEX ensures that your team has access to vital past records for accurate reporting and informed decision-making. By focusing on the most relevant data—such as key incidents or recent trends—you streamline your new system’s setup, improve report accuracy, and maintain compliance. A well-chosen data set helps your organization quickly gain insights and value from EcoOnline IEX, supporting better outcomes and smoother operations from day one.

Historical Data Attachments

Importing historical data attachments provides significant value by ensuring that your team has seamless access to supporting documents and records alongside your main data sets. These attachments help maintain a complete and traceable history within EcoOnline IEX. Having these files readily available enhances your ability to generate accurate reports, supports regulatory compliance, and facilitates informed decision-making. Ultimately, including data attachments from the outset streamlines workflows, preserves vital context, and maximizes the usefulness of your historical data for ongoing operations.

Automatic Data Imports

Automatic data imports deliver ongoing value by ensuring your EcoOnline IEX system is continuously updated with the most relevant information, such as HR data, hours and headcount details, and organizational structure. This regular influx of accurate data empowers your team to make timely, informed decisions, keeps records current, and allows your organization to respond efficiently to operational changes. By streamlining how key data—ranging from personnel statistics to company frameworks—is incorporated, your team benefits from improved consistency, reduced manual effort, and optimized workflows. Ultimately, automated imports provide the foundation for robust reporting, ongoing compliance, and maximum insight, unlocking the full potential of your investment in EcoOnline IEX.

Single Sign On

Single sign-on enhances your team’s experience by providing secure, convenient access to EcoOnline IEX using existing credentials. This streamlined login process reduces password fatigue, strengthens security, and enables users to get started quickly—so your organization benefits from improved efficiency and a smoother workflow right from the outset.

Languages

Where you have languages as part of your project scope, these will be enabled after your Implementation Consultant has completed the build of your EcoOnline IEX system. This will ensure that all translations are accurate at that point in time.

Automatic Data Extracts

Automatic data extracts empower your organization by ensuring you have timely access to the information you need, exactly when you need it. With customizable and regularly scheduled extracts, you gain flexibility to focus on the data most relevant to your goals, supporting more accurate reporting and strategic decision-making. The ability to filter and select specific data fields means your team receives only the most pertinent insights—helping you stay agile, informed, and compliant. While document uploads are not included, the seamless delivery of structured data to a secure SFTP folder keeps your business operations efficient and your records accessible for ongoing analysis and improvement.

API

API is another method to add, delete and extract data from the system. If that is in scope of your project or added afterwards, your Implementation Consultant will provide you with all the documentation you need to set up the API connections at your end.

GeoMapping

Your IEX system can also be linked to Google Maps. In this case, specific data sets can be plot in a map. Your Implementation Consultant will confirm all the requirements with you before setting this up.

Dashboard, Consolidated & Scheduled Reports

Our Reporting tool, included with every IEX system, provides powerful insights to help you make informed decisions and stay on top of key metrics. You can further enhance your team's experience and drive better outcomes with optional advanced features, available as paid add-ons:

Dashboard: Instantly visualise important trends and performance indicators with dynamic, pre-configured graphs that update every time you access the page. This gives your team a clear, real-time view of critical data, enabling faster response and more strategic action.

Consolidated Reports: Gain deeper understanding by using customisable reports with built-in filters. These reports empower you to tailor the information to your needs, making complex data easy to analyse and share.

Scheduled Reports: Stay proactive and informed—scheduled reports automatically generate and save key insights, delivering timely information directly to users. This supports ongoing monitoring and ensures everyone has access to the latest data when they need it.

By leveraging these reporting features, your organisation can make data-driven decisions, streamline operations, and support continuous improvement. Please note: Advanced features such as Dashboards, Consolidated Reports, and Scheduled Reports are not included by default and require an additional investment.

Remote Forms

Remote Forms allow users to log a record to your Info Exchange system without the need to log in or without the need of a user account.

Mobile app

You can choose to build certain forms on the Mobile app. The Mobile app is designed to enable completion of forms on mobile or tablet devices, with unreliable or no internet connection. Forms made available on the Mobile app can either be protected by username and password (or Single-Sign On), or they can be accessed anonymously/by non-registered users. You will be able to log records without internet connection if you pre-load the form.

Onboarding & Implementation

What's in Scope – Implementation

- Modules, add-ons and services detailed within your contract
- Project introduction meeting
- Light touch project management and schedule
- Needs Analysis session(s)
- Best practice guidance from your Quality Lead
- Technical go live preparations
- Super User training resources
- Transition to Business as Usual (BAU) support post-go live

What's not in Scope – Implementation

Anything not specifically documented as in scope is classed as out of scope. In particular, the following are out of scope for this project:

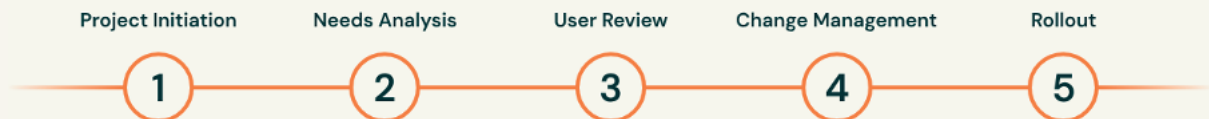
- Modules and services not detailed within the scope of your contract
- Management of internal tasks, including technical tasks (setting up firewall rules etc.)
- Provision of test scripts and training documentation for User Review
- End-user training
- Internal system roll-out plan and execution

EcoOnline IEX implementation is a tried and tested methodology made up of 5 key stages, each with tasks and milestones. Our standard approach is followed as best practice to ensure the successful delivery of your system.

Our team have vast experience working on software implementation projects for many different users, so you can rest assured your project is in good hands.

By launch you'll have a comprehensive system to engage your workforce, with room for future growth.

Below is our sequential 5 stage approach to delivering EcoOnline IEX.



Stage 1 – Project Initiation

We'll review your requirements as per signed SoW and prepare a high-level specification document for our Needs Analysis call.

Stage 2 – Needs Analysis

We will understand how the data needs to be captured and permissioned in IEX. Following our Needs Analysis call, you will receive a specification document detailing how the system will be built.

Stage 3 – User Review

We've completed the build of the system, now it's back to you to check that we have captured all of the required data.

You can give some selected users access to review the changes we have made.

Stage 4 – Change Management

After the build and testing of the system is complete, we are ready to configure your permissions and automatic email notifications. This will be managed using our Permissions Matrix.

The best projects always have a clear internal communication plan, engaged end users and an effective training strategy. So, please make sure the right users are available to attend our Administration Training Session.

Stage 5 – Roll Out

You're all set and ready to launch.

Your organisation can now reap the benefits of all of your hard work.

Service Management & Support

Technical Support

Our technical support services are designed to ensure you receive timely, reliable assistance whenever you need it.

Customers can raise support requests via email or our online ticketing system, providing a simple and efficient way to log and track issues.

Support Response Times

We operate a structured priority-based response model to ensure critical issues are addressed quickly:

Category 1 (Critical): Initial response within 2 business hours, with regular updates provided until the issue is resolved.

Category 2 (High): Initial response within 4 business hours, with ongoing communication maintained through to resolution.

Category 3 (Medium): Initial response within 12 business hours of case creation.

Category 4 (Low): Initial response within 24 business hours of case creation.

Support Channels

Phone support: Available 24 hours a day, 7 days a week

Email & online ticketing: Available for logging and managing support requests

Onsite support: Available by arrangement and at an additional cost

Security & Data Protection

Data-in-transit protection

Protection between networks

- Data protection between buyer and supplier networks
- Private network or public sector network
- TLS (Version 1.2 or above)

Protection within your network

- Data protection within supplier network
- TLS (Version 1.2 or above)
- IPsec or TLS VPN gateway

Data storage and processing locations

- United Kingdom
- European Economic Area (EEA)

User control over data storage and processing locations

Datacentre security standards

- Complies with a recognised standard, for example CSA CCM v4.0 or SSAE-18 / ISAE 3402

Penetration testing frequency

- At least once a year

Penetration testing approach

- 'IT Health Check' performed by a CREST-approved service provider

Protection of data at rest

- Physical access control, complying with CSA CCM v4.0
- Physical access control, complying with SSAE-18 / ISAE 3402

Data sanitisation type

- Deleted data can't be directly accessed / Cryptographic Erasure
- Data Erasure
- Explicit overwriting of storage before reallocation / Secure Erase
- Degaussing
- Physical Destruction / Hardware containing data is completely destroyed

Equipment disposal approach

- Complying with a recognised standard, for example CSA CCM v4.0, CAS (Sanitisation) or ISO/IEC 27001

Service Availability & Performance

- EcoOnline offers 99.95% application uptime and 99.99% hosting uptime. The application and hosting environment is continuously monitored. EcoOnline have 24/7 provider support SLAs in place to ensure uptime of the hosting infrastructure.
- EcoOnline maintain full disaster recovery plans for all business activities and hosted infrastructure. These are audited as part of our ISO 27001 certification and are managed as part of an overall audit program.



www.ecoonline.com



Aldgate Tower, 2 Leman Street, London, UK

