

# Invotra Council Intranet Cloud Software Service Definition Document for G-Cloud 15

January 2026



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## 1. Overview of Invotra

### 1.1. Introduction

Invotra is a leading SaaS provider of digital workplace solutions and specialises in serving central and local government.

Each day, Invotra supplies its services to hundreds of thousands of UK Civil Servants, providing more modern, innovative ways of working within their organisations.

Our cloud-based software solutions connect professionals to the information they need with features, apps and integrations that make work more engaging, focused and productive.

Invotra is a British SME, with offices in Woking and Dublin.

Invotra Council Intranet is a highly flexible and secure intranet and extranet portal. Supporting customers such as the Department for Work and Pensions, and Department for Transport, Invotra intranet is designed to give employees a voice and provide people with all of the tools they need to self-serve, collaborate and work efficiently.

Invotra intranet specialises in joining up organisations with user bases from 50 all the way through to 100,000+. Invotra's features, apps and integrations combine to make work more engaging, focused and productive.

Invotra's intranet product is cloud-based, completely customisable and designed to create cohesion within and throughout your knowledge and resources.

## 1.2. History

With a background as CMS specialists (specifically Drupal), back in 2009, we were approached and tasked with working on the data.gov.uk project for the Cabinet Office.

As a result of that project's success, the UK's Home Office challenged our team to build a SaaS Content Management System that was both flexible and cost-effective. This became our intranet product as we know it today.

Invotra now serves hundreds of thousands of UK civil servants, having a variety of public sector organisations on its books including central and local government, NHS, ALBs and charities.

## 2. Who we've worked with



Invotra has been on the UK Government's G-Cloud Digital Marketplace framework from the very beginning in 2012.

Starting initially with consultant work for the Cabinet Office, Invotra has gone on to develop a strong partnership with the UK Government. Invotra began working with the Home Office (HO) and the Department for Transport (DfT) in 2015, and the Department for Work and Pensions (DWP) in 2017. Our valued customer base has grown to include various local authorities which approached Invotra to implement intranet solutions that promote agile and efficient working practices. Among these customers are East Herts, Stevenage, Reading Borough Council, and the West Midlands Combined Authority.

In early 2020, Invotra was also named as the Top Ranked Intranet Provider for the NHS London Procurement Partnership on the Information Management and Technology Framework. From 2020-2022, Invotra was the intranet provider of choice for NHS Test and Trace, before the organisation was restructured and absorbed into UKHSA.

Invotra overcomes a wide variety of challenges and meets many different requirements for individual professionals, through to enterprise level user bases exceeding 100,000+.

We understand that large complex organisations consist of many teams, departments and third party suppliers who work together to deliver on business objectives. Invotra is committed to working with all customers' third party suppliers to drive the best outcomes.

We regularly look to promote great things that customers are doing through case studies, applications for awards, show and tells to other customers, and invitations to showcase implementations of our applications to the Invotra Team.

We expect and celebrate customers challenging us and problem solving is at the heart of what we do for our customers at Invotra.

Our primary focus is and continues to be on the public sector.



## 3. Why Invotra?

### 3.1. Culture

Invotra is fully committed to encouraging equality and diversity among our workforce, and eliminating discrimination. We are a meritocratic organisation. We value talent irrespective of its origin. Our aim is to be truly representative of all sections of society, and for our customers and for each employee to feel respected, be wholly merit driven and able to give their best.

We are a member of the Disability Confident Scheme and work towards reducing the disability employment gap. We also offer work experience to SEN students at a local school.

Our hugely successful apprenticeship programme, which has been recognised by winning multiple high calibre awards, allows us to develop a diverse, sustainable organisation that has an amazing culture and is truly embedded within the business, with all employees constantly learning and evolving. We are proud to say that 55% of our staff are either current or past apprentices, and 40% of the Invotra board members started as apprentices.

### 3.2. Vision

At Invotra, we are dedicated to serving those who serve the public by delivering secure, efficient, and adaptable digital workplace solutions tailored to the unique needs of civil service. Our commitment is to enhance service delivery and foster superior outcomes for the country.

With a rich heritage in intranet solutions and as a versatile SaaS applications provider, we empower organisations to transform their digital environments with

our comprehensive suite of products, driving productivity and engagement across government sectors.

Our agile development model is at the heart of our innovation. It enables us to swiftly incorporate customer feedback into our continuous release cycle, ensuring our solutions not only meet but anticipate the evolving demands of a changing workforce. Each update brings enhancements and new features, directly influenced by the users who know best, our clients.

We provide a platform where customers can actively participate in shaping our tools. Ideas and feature requests are encouraged, carefully evaluated by our product team, and potentially integrated into our development roadmap.

Our flexible SaaS model has consistently resolved challenges within large government departments. As the public sector undergoes significant changes in workforce structures and expectations, Invotra remains a steadfast partner, continually evolving to address these new challenges head-on.

## 4. Product Overview and Features

### 4.1. Intranet

Invotra's intranet is a powerful Content Management System (CMS) utilised by organisations with thousands of employees.

Connecting professionals to the information they need at work, the intranet's features, apps and integrations combine to make work more engaging, focused and productive. This ensures our customers' audiences can be reached with relevant and personalised content that ultimately increases engagement.

Invotra's intranet is used to drive engagement, collaboration and boost productivity throughout workforces whilst ensuring all employees are given a voice. Subject matter experts and publishing teams can share quality information that's always relevant, while users can focus on doing their best work, with all the tools they need at their disposal to self-serve, collaborate and work efficiently.

Content is completely customisable and designed to create cohesion within and throughout your knowledge and resources.

Our products and services are cloud-based, hosted on Amazon Web Services (AWS).

## 4.2. Extranet Portal

Expand the reach of your organisation by collaborating with key stakeholders and external third parties through one easy-to-use extranet portal.

Invotra's extranet portal is the simple and secure way to give your partners, stakeholders, trusts, contractors and third parties restricted access to your organisation's information via a multi-device experience, improving communication and increasing productivity.

This allows you to bring external resources closer to your organisation and manage them more efficiently than with email, chat or a task system, where latent knowledge is often lost.

External users can access, read and even publish content types depending on their permissions. They can also collaborate with internal colleagues in groups and via commenting, while engaging directly with your intranet's content. Access to applications such as Groups and Ideas mean that your externals can be engaged and involved.

Invotra's extranet portal saves valuable time by giving your external users sight of the original information you need them to see, such as policies, leading to zero duplication and guaranteed governance.

Extranet portal features:

- Customisable homepage for externals
- Targeted information architecture based on external users' permissions
- Control access to site sections

- Control which apps external users can access
- Control whether or not extranet users can access the people, teams or locations directories

### 4.3. Staff Directory

Invotra's staff directory is the first choice for several UK Government departments. Its dynamic range of directory applications help organisations securely manage their people, teams and locations in one place.

The staff directory can be populated manually or autonomously through your Active Directory/HR System.

Invotra's staff directory makes it easy to organise and search for employees across multiple teams and locations. You can search for users via skills, roles, interests and more. Not only this, but you can also email, call or follow users' actions through their profiles.

Staff directory features:

- Organisational Chart
- Teams Chart
- Locations
- Search Directory

### 4.4. Collaborative Apps

Invotra provides robust and scalable social networking capabilities to organisations through its collaborative apps.

Invotra has worked with customers to identify 3 core 'whys' of the intranet:

1. Giving end users a voice
2. Giving end users access to the information they need to do great work
3. Top down, bottom up and organisation-wide communications

Our collaborative applications are the key to these 3 requirements.

### **Giving end users a voice:**

- Blogs - Invotra's blog application allows anyone in the organisation to create and publish a blog. This supports a culture where great work and diversity are celebrated
- Message wall - to congratulate and support colleagues
- Groups - to discuss topics and share information
- Ideas - allow staff to raise ideas for review and implementation
- Invotra Queries - encourage your users to share knowledge and ask questions
- Invotra Polls - engage your workforce through interactive polling
- Webforms - allow staff to submit feedback through a series of webforms that can be embedded in multiple locations on the intranet
- User profile - a place where end users can add information about themselves and their roles
- Commenting - on news, on blogs, on content - if you want feedback from your end users activate the commenting widget. Users can also like and reply to comments from their colleagues.
- Communication through all of Invotra's applications includes the use of @mentioning and hashtagging.

### **Giving end users access to the information they need to do great work**

- Badges - help staff easily identify colleagues who have the skills they may need (e.g. languages, organisational roles)
- Integrated search - search across the Invotra application for people and content, including files and content from MS365
- Local and organisation wide sections provide the ability to target specific teams and locations with relevant content.

## **Top down, bottom up and organisation-wide communications**

- News - Content creators can produce and publish news within the platform. These news items can be tagged or prioritised depending on their importance.

Content can then be targeted further towards a specific team, location, role or region. Publishing teams can distribute newsflashes to the organisation on any site section within the Intranet.

- Broadcasts - Webmasters have the ability to publish a banner that will drop down from the top of the intranet to all users, on desktop and smart devices.

The broadcast banner can also be targeted towards a specific team, location, role grade or region and will only be dismissed when the user viewing the banner selects the 'dismiss' option.

Applications can be enabled / disabled at the customers request and depending on your requirements. This may also influence the cost.

## 4.5. Enterprise Search

Invotra's search engine is simple to use, highly configurable and powered by AWS OpenSearch.

Our search experience is supported with 8 years of user testing with over 200,000 users.

We work with customers to design a search experience that accurately meets the way users search for information on the intranet, based on user behaviours and frequently searched information from your current platforms.

You will be able to access the following configuration settings to further personalise and optimise the search experience:

- Search filters: Select which filters appear on search results screens to help your users. Choose from any field that exists on a content creation page (e.g. tags, section, published date) or on a user profile page (e.g. role, department, skills).
- Search synonyms: Ensure two words users might use to look for the same result bring back the correct result. Uses include full names or abbreviated forms and commonly ambiguous nouns such as 'lawyer' and 'solicitor'.
- Search highlights: Highlight specific results to appear at the top of a search results screen when a user searches for a specific query. For example, if a user searches for 'Holiday', you can specify the result at the top of that search result page is 'How to book your holiday'.

Invotra search also supports:

- Application specific searches: In addition to our main search feature, each of our individual apps has its own search capabilities, filtered by category, content and/or time.
- Integrated/Federated search: Allows users to search for documents across their digital estate from integrated applications such as M365 to create a consistent experience for your staff when searching for documents that may be hosted on other platforms.
- Recent searches: The 5 most recent searches are automatically stored and appear whenever a user selects the search icon in the workbar at the top of the screen.
- Saved searches: Users can save searches, if they wish to reuse the results their search term has triggered. Saved searches appear in the search dropdown from the workbar and in the My Content space.

## 4.6. Metrics

Invotra provides a full analytics service directly within the intranet product. The service will enable you to answer all of the questions you need to build a great intranet.

### **Analytics**

There is a whole suite of reports that can be run, but here are a few examples our customers run today:

- Views of articles, channels or specific areas of the application
- Average length of time on application/articles for users
- Most searched terms on the application
- Sentiment analysis on comments
- Page overlay to see which parts of the pages users click most
- User transitions for capturing their journeys on the application

You will also be able to create and export reports into graphs and charts. We will train and help you understand the range of reports as part of the onboarding process.

### **Dashboards**

The in-platform dashboards have been designed to give your end users an overview of the engagement that is taking place in each area of the application.

Our social applications such as Groups and Message Wall, offer metrics such as:

- Highest contributing authors/teams
- Most commented/liked posts
- Popular message/post types

There are also dashboards available when viewing a team/location profile page which will give your users an overview of:

- Skills people in the team/location have
- Interests people in the team/location have
- Roles people have in the team/location

Invotra's built-in analytics enable organisations to roll-out evidence-based improvements to their intranet navigation and content. Stakeholders and content authors can track statistics and KPIs, helping to justify their digital strategy, and demonstrate that key metrics are being achieved.

## 5. Governance

### 5.1. Revisions and Workflows

Governance is key to defining intranet priorities and preventing content sprawl.

Invotra's intranet lets publishers track, compare and revert to previously published versions of content types.

All content types have a workflow and revision log, detailing information such as the author and date, as well as highlighting the changes made to content so publishers can identify what has changed.

Workflow states let publishing teams quality check their work before it's published, receiving email notifications when each role is required and scheduling publish dates when the content is signed off. You can also add workflow comments before every state change so the next person in the process is aware of any amends, ideas or instructions that need to be reviewed and considered.

The ability to add content review dates also ensures that all content is kept up to date; a particularly useful feature for policies, manuals and news items. Owners

and creators of the content will be notified 31 and 3 days before a piece of content is due to be unpublished if it is not reviewed and the workflow state changed.

## 5.2. Distributed Publishing

The intranet application offers distributed publishing so you can share permissions across your intranet, as well as restrict them to certain areas.

Determined by a range of roles, which you assign, you are provided with the flexibility and control to distribute publishing responsibilities in a way that suits your organisation's approach to content.

Every section that's created can have its own publishing team with permissions cascading from author to editor to publisher to manager. This puts the people who know best at the source of your intranet's content while establishing a solid review and sign off process.

Improved, individualised and manageable section controls also mean organisations can ensure areas and sections are well populated, content is easy to access, and information is kept up to date and relevant.

## 6. Product Benefits

### 6.1. Content Management System (CMS)

Invotra's CMS is robust, secure, scalable and extraordinarily flexible. Managers and publishers can quickly customise their intranet to look and function exactly as they want. Sections and content types are created effortlessly and maintained with ease.

With a wide choice of pre-loaded layouts, Invotra continually evolves its widget library so the right content reaches users in the right way at the right time. The

CMS also comes equipped with numerous roles and permissions, as well as workflow states that support quality and responsible content management.

Invotra's ability to create world-class productivity applications is unparalleled having been working in the CMS space for over 10 years. We have sponsored the development of several well-known and widely used open source CMS modules for almost a decade.

Our innovative, open-source approach remains at the core of what Invotra is to this day.

## 6.2. Accessibility

Accessibility is something we are extremely passionate about, however, simply saying we meet WCAG 2.1 'AA' standards is not enough for us.

The intranet interface utilises Material Design (the tried and tested open source visual language created by Google) enabling Invotra to make future-proof developments that are user centred with accessibility at their core.

Our products are designed to provide a great experience for 100% of users, in line with the Equality Act 2010. Our team regularly meets with accessibility users across our customer base to better understand the challenges they face.

Invotra currently serves a diverse set of users across the UK Public Sector including:

- 25,000+ users of assistive technologies
- Users with limited or non-existent technology expertise
- Users with an average age of 50+

We ensure any features and configurations available for you to manage across the product always meet WCAG 2.1AA standards, and aim to implement AAA where possible.

Our 'Accessibility Checker' feature also analyses text/images/tables etc inputted into our text fields, and audits the input from your editors/publishers against WCAG 2.1 AA standards. If what is being inputted fails any of the criterias, you will quickly be prompted by our checker with a recommended change. Other product features to support accessibility include:

- Responsive design (available on mobile, tablet, desktop, laptop and supports a progressive web app and iOS mobile app)
- Accessibility checker in content edit screens
- Integration with Silktide

### 6.3. APIs/Integrations

User experience is key for adoption across your digital channels. It's important that your users can easily access everything they need. Our suite of APIs and knowledge of integrations will help you create a centralised intranet.

Invotra's intranet product is designed from the "ground-up" to ensure it's flexible enough to integrate into even the most complex technical landscapes.

We provide a range of inbound and outbound connectors to ensure it can tie into other systems without customers incurring any additional costs.

In the event a team or department requires a connector that is not available, contact us and we will discuss options.

### 6.4. User Experience (UX) Design

Our UX specialists have over 15 years experience working with customers to create quality, intuitive designs, both from an architectural and UX perspective, for digital workplace applications.

We understand that in order for an intranet to be a success, it has to not only deliver a quality, accessible experience for all users but also ensure content is accurate, relevant and easily findable for staff as and when they need it.

Invotra gives organisations complete control over creating their intranet's user experience. Our recent use of Google's Material Design also unifies this across devices and platforms, while delivering a universal user experience that's modern, innovative and immersive.

Our approach, outlined below, has been used for customers large and small, serving audiences ranging from 50 - 100,000+ users, with volumes of content ranging from 100 pages to 950,000+ pages. Designing an engaging, accessible, user experience is critical to drive adoption. With all of our customers, user research and testing results are used to iteratively design IA, content and user experience across the intranet. We'll use a combination of elements when carefully designing your new intranet, including:

- Research gathered
- GDS design standards
- WCAG 2.1AA criterias
- User feedback at each stage
- Best practises from existing intranet customers

Throughout the design process we'll work, in partnership with your UX/Design team if available, to identify the required rollout stages of your project (e.g. Alpha, Beta and Launch). For each stage, we will categorise the design work streams (detailed below), putting together designs that are user tested and iteratively updated, before signing off on a final version for each rollout stage.

### **Content (news, landing pages, policies)**

Initially we'll work with you and your stakeholders to conduct a content audit on any existing platform that focuses on identifying content and structure that will be migrated to the new platform.

We'll have a strong understanding of the types of information you display on each type of content from our research, and where your users are clicking once they reach that content (e.g. left-hand navigation vs right-hand side links), from the analytics review. After presenting you with 3-5 different content designs to review and analyse, we'll work with you to create initial designs for each of your content types, ensuring all fields and data on your current platform are resembled within Invotra ahead of migration.

## **Homepage**

The homepage is arguably the most important page on an intranet as this is where users usually land initially to start their experience. We have a portfolio of designs for different homepage themes such as: social, information based, engagement and a combination of themes, to provide you with ideas of what other customers are doing, and how your intranet could look. Our UX team will work closely with you on design variations based on our research and your requirements, to ensure you capture everything you need.

## **Information Architecture (IA)**

We'll provide you with an initial recommended IA and navigation structure from the content audit, research, and analytics review work completed. The IA of your intranet is key to ensure your users see the benefit of a new platform. Our UX team will help you to design a user-centred IA/navigation and create a list of useful resources, or quick links, that your user demographics need easy access to. The quick links can be targeted at each user demographic, creating a personalised experience and can be accessed separately to the IA.

## **Taxonomy/Search**

Accurately tagged content, on both the administration-facing pages when creating the content and the designs that are visible to your users, greatly improves user experience. We'll provide an initial taxonomy structure that can be used by editors/publishers to tag their content, and design the search experience

to include tags as part of the results ranking process. We'll also work with you to understand the filters and language that make most sense to your users, and accurately depict this on the search screens throughout.

Invotra boasts one of the strongest and most flexible intranet configurations across the intranet community, making it easy for us to iteratively test and adjust designs based on the results. Providing the tools to build the experience your users want, our Layout Management and In-Place Editing allow us to create, update and test content and homepage designs in real-time. Our IA and Taxonomy build screens are simple to use, accessible, and have been user tested by over 200,000+ users across the UK Government and the NHS. With these toolsets, we'll be able to support you with your vision and ensure policies, procedures and other critical information are easily found.

Our intranet application is fully responsive to all screen resolutions, and we approach all design projects with a mobile first methodology, having launched our iOS and Android Progressive Web Application (PWA) to all customers in 2019. The platform is currently accessed through various devices and browsers including: Internet Explorer, Chrome, Edge, Firefox, Safari and other browsers provided by iOS and Android.

With each design variation we strongly recommend conducting A/B testing with different audiences, and we can work with you to gather relevant feedback ahead of iterating each design.

### **Profiling of users**

Invotra will automatically connect with Active Directory or equivalent HR platform that hosts all the data for your staff. If your platform does not support integrations via an API or your data is hosted across multiple platforms, this is still easily achievable but alternatively we can use an export/import process.

This will allow us to automatically create and populate user profiles for each of your staff members including information such as: department, role, phone number and email address. With this information you'll then be able to take

advantage of the targeting feature Invotra offers whereby you can create, design and publish content that is targeted at specific audiences on the intranet delivering a truly personal experience for all your staff.

As well as this information, you will be able to control which other fields your staff can update themselves on their profile, including information such as: skills, interests, about me and qualifications. This will give users an opportunity to create a profile that truly resembles them, and provide them with opportunities to connect with their colleagues easily using our 'Similar to you' schema built into the product.

## 6.5. Information Architecture (IA)

The Information Architecture of your intranet is established and modified through the creation, distribution and redistribution of sections and content types.

Your IA can be structured in various ways, from task-based categories to department orientated information and resources.

Unlike other software products, Invotra is designed to coordinate and connect all of your information in one location to increase focus and productivity for users.

It's one place to access everything a user needs to do their work, saving you from the frustrations of fragmented silos and reducing the risks caused by multiple versions of duplicated content.

Our intuitive, user-centred menus make navigating your intranet clear and obvious. Using the widget library, publishers and managers can quickly drag and drop local navigations that will automatically update whenever new sections or content types are added.

Related external links and 'quick links' can also be added to give users convenient access to services they might often use, such as accountancy software for logging expenses.

Information Architecture features:

- Menu management
- Section management
- Flexible Information Architecture
- Contextual Information Architecture
- In Place layout editing
- Responsive fluid or fixed layouts

## 6.6. Single Sign-On (SSO) with Invotra Auth

Invotra offers Single Sign-On (SSO) with Invotra Auth. This means users can access your intranet and extranet portal without re-entering login credentials. There are fewer passwords to manage, reducing the chance of human error and ensuring a seamless and secure login experience for users.

Invotra Auth, backed by AWS Cognito and compatible with SAML 2.0 launched in December 2019. It includes authentication via multiple identity providers, and optional multi-factor authentication (MFA) via SMS. AWS Cognito acts as the overarching authentication layer to enhance security.

Invotra's intranet instance is designed with the ability to connect to multiple identity provider domains (e.g. Azure AD) to authenticate your users against their own secure identity providers, and you can also provide authenticated access to external organisations.

We also understand that you may need to provide access to users outside of your internal networks. In this case, we've helped other customers in the health sector implement Multi Factor Authentication (MFA) against GOV.UK Notify. We helped NHS Test and Trace overcome a challenge whereby there were new visitors to the intranet that did not already exist in some form of Active Directory or HR platform, and therefore the platform couldn't validate their phone number or email address for MFA. In response to this, we designed and built an additional layer to the MFA protocol in partnership with their security team to capture users phone numbers as part of the user verification process.

## 6.7. Cloud-based

As a cloud-based product, the intranet scales up and down to meet the most demanding requirements and remains optimised to give a great user experience.

Advantages of a cloud-based intranet include:

- Scalable
- Flexible integration with your enterprise
- Built-in disaster recovery
- 24/7 monitoring and support
- Freedom to control access or let people work anywhere
- Regular upgrades
- Hassle-free maintenance
- High performance
- Secure

The service is completely cloud-based so can be accessed by anyone who has internet access. This access can be restricted to use controlled paths e.g. via an organisation's own infrastructure, this is optional for all customers. Within the platform all communications channels are fully resilient and backed by a global infrastructure provided by AWS, however for all UK government and public sector organisations by default we restrict data to the UK Region (AWS London Region).

All data in transit is encrypted using Transport Layer Security (TLS).

The database (as well as the Network File System (NFS) service) is encrypted which is where persistent data is stored.

The intranet platform has multiple layers of security implemented. The environment is provisioned within a Virtual Private Cloud split across two data centres.

All resources reside within the private network of the virtual private cloud. There is the exception of the load balancer residing in the public VPC for HTTPS connectivity over the public internet.

Each resource within the Amazon Web Services (AWS) environment has a corresponding security group (firewall rules) which by default blocks all traffic and only allows specific traffic from specific resources.

## 7. Service Overview

### 7.1. Service Design

From the initial onboarding phase to ongoing collaboration and feedback loops, we strive to optimise efficiency, drive tangible business value, and exceed expectations at every stage of the journey. Our commitment to service design ensures seamless integration and sustained value for our customers.

### 7.2. Uptime Service Level Agreement (SLA)

At Invotra, service is everything. We take great pride in the ways in which we deliver an excellent service to our customers. We measure this service intensively and in-house.

Every month, we gather every Invotra employee in the company together to discuss and review Invotra's service delivery across all of our customers. Everyone, from new starters and apprentices to directors, is expected to contribute their ideas on how to improve our service to our customers.

#### **Service monitoring, alerts, and service reports**

Our Service Desk availability hours are 07:00-19:00h Monday - Friday excluding UK bank holidays.

- Invotra monitors its live service 24/7 via AWS Cloudwatch.
- Monitoring and alert triggers are automated to advise of adverse events related to live service (SMS/ email).
- Service reports are generated for each Invotra customer, and yours can be reviewed as part of your Monthly Business Review (held by your dedicated Account Manager).

## **System Maintenance and Upgrades**

Invotra deploys release updates and enhancements to our intranet platform on a regular basis, with new features and improvements rolled out incrementally to ensure minimal disruption to your operations. The types of releases used within Invotra are:

- Full (Major) – major enhancements to the application, including significant new functionality
- Delta (Minor) – Mainly fixes to existing code, but with some limited new functionality from time to time. These also include maintenance and security upgrades for service components used within the Invotra application when required.

There is also a process for emergency releases, where multiple changes must be introduced in order to fix a problem affecting service.

The notice period given for planned maintenance works:

- The Invotra release schedule is made available to customers annually in advance
- AWS patching is completed monthly, the schedule is made available on an annual basis
- Any downtime required for releases will be made known to the customers.

### 7.3. Service Level Agreement (SLA) Priority Levels

Invotra provides defined SLA Priority Levels with resolution times to fix issues. We go above and beyond to ensure the highest quality of service.

Our SLAs are categorised into priority levels, which determine the target fix time for each incident that is raised.

| Priority code | Definition                                                                                                                                                                                        |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| P1            | The service is unavailable to the Customer (entire user base).                                                                                                                                    |
| P2            | The service contains an issue that prevents more than 50% of the customer's user base from executing one or more critical business processes with a significant impact, and no workaround exists. |
| P3            | The service contains an issue that prevents users from executing one or more important business processes. A workaround may or may not be available, or the workaround may not be optimal.        |
| P4            | The customer has a question or request for information on the application.                                                                                                                        |

| Priority code | Target fix time |
|---------------|-----------------|
|---------------|-----------------|

|    |          |
|----|----------|
| P1 | 4 hours  |
| P2 | 8 hours  |
| P3 | 24 hours |
| P4 | 60 hours |

The process for delivering fixes for defects vary based on severity but can include:

- Service impacting releases (potential downtime required)
- Standard change
- Expedited change
- Emergency change

### **Major incident Helpline**

For critical issues impacting service availability (P1 incidents), we provide a dedicated Major Incident Helpline that is available 24/7 for immediate assistance and escalation.

## 7.4. Account Management

Each intranet customer is assigned a dedicated Account Manager who serves as your primary point of contact for all service-related matters. Your Account Manager will work closely with you to understand your unique requirements, address any concerns, and ensure that you derive maximum value from our services.

### **Early Life Support**

For the first 14 days post go live, Invotra will provide enhanced support to ensure onboarding has been completed effectively and you're familiar with all the tools and resources available to you. Your Account Manager will engage with you on a daily basis to review:

- Usage metrics
- Questions and clarifications

### **Dedicated Account Manager**

With Invotra you will have a dedicated Account Manager to engage with you on an ongoing basis. Our Account Management model is focused on working proactively in partnership with customers to help them get more value out of their purchase and share their feedback with the wider Invotra team. Your Account Manager will work closely with you to drive your customer experience forward and ensure a successful path into the future by understanding your unique requirements.

Responsibilities of your Account Manager:

- Live handover preparation - setting up and assisting you in using the Invotra product
- Training and familiarising you with product features
- Sharing best practises
- Voice of the customer
- Sharing your feedback with the wider Invotra business
- Recording and prioritising new product feature requests on your behalf
- Expanding the product's use cases to help you realise its full potential
- Support in fostering a deeper relationship with key contacts in the Invotra Team as required (Service, Product, Technical, Development etc.)

Your Account Manager will set up a monthly Business Review with you and will cover as a baseline:

- Service (including service report)

- Product updates
- Goal tracking
- Customer feedback

### **Monthly service reviews**

As part of your monthly business review, your Account Manager will provide a service report. This report will cover the performance of your application, and review any incidents that have been raised against the service, reviewing their resolution time against SLAs. You will also be provided with a monthly service report detailing everything that is covered in the service reviews.

## 8. Onboarding and Projects

Onboarding and project work streams are managed by our consulting division, 'Invuse', so that we can assign dedicated resources to help Invotra's customers meet their deadlines.

### 8.1. Onboarding

We understand the importance of designing and building a digital workplace based on research and data to inform all decision making. We have a professional services arm, 'Invuse', that specialises in user research and digital accessibility, priding themselves on advocating for the voice of end users.

We have worked with over 50 UK Public Sector organisations to support them with planning, structuring and launching digital services to meet business needs and overcome user challenges. The dedicated team starts by conducting a detailed discovery phase that focuses on bridging the gap between your business objectives and user needs.

**Project Delivery Plan:** Our project delivery plan adheres to a three-phase model, ensuring a comprehensive and user-centric approach to launching your new intranet. Our proven approach to intranet onboarding and training prioritises quality and thoroughness, incorporating user and accessibility testing at each stage by adopting agile methodologies throughout the project. The phased implementation covers Alpha, Beta, and Production phases, delivering a solution that aligns with your requirements and embodies best agile practices for optimal user experience at the heart. We have utilised this approach across 30+ organisations with anywhere from 35 to 100,000+ users,

**Tailored Training Programme:** Our product is the result of a decade of experience and user research. Its intuitive design ensures an easy to follow and smooth training process for all users including those with minimal digital experience.

Our comprehensive training program is designed to cater to the diverse needs of your colleagues. Regardless of their technical expertise, roles, or responsibilities, we ensure that everyone receives the necessary training to effectively utilise the platform and increase user adoption and engagement. Our training program encompasses a wide range of users, from Intranet Administrators who require advanced configuration and maintenance skills, to employees who need to perform simple tasks such as updating their profiles or accessing information quickly. Rest assured, we have you covered with our training programs that empower users at all levels.

**Intranet Administrator Training:** Prepare your administrators for success with a comprehensive 2-day interactive workshop before the Alpha launch. Covering all configuration features, this training equips them to effectively serve your staff. A half-day refresher course will be provided prior to the Beta and Production launches.

**Editor/Publisher Training:** Empower your Editors and Publishers with a tailored 1-day workshop focused on designing, creating, publishing, and targeting accessible content. They will gain the skills needed to produce high-quality content suitable for an industry average reading age of 9 years old.

**Department Lead Training:** Delegate content management responsibilities with confidence. Our half-day workshop for department leads will demonstrate how they can effectively manage their respective areas of the intranet.

**Live end-user Webinars:** Provide your on-the-go end users with concise, task-focused guidance. Our UX team will deliver live video episodes, showcasing key user journeys such as profile updates, search bar usage, and intranet navigation. These episodes will be available for future reference on the intranet.

Our implementation plan and training program align seamlessly with your culture and business drivers. With a user-centric approach and agile methodologies, we will ensure a seamless intranet launch, leaving all staff members feeling communicated with and valued. In line with your objectives, our tailored training program empowers staff at all levels, fostering effective communication and enhancing the employee experience. By prioritising user experience and accommodating specific requirements, our solution drives organisational success. Trust us to deliver a comprehensive intranet solution that embodies your values and maximises user adoption.

## 8.2. Project Delivery

Our professional services arm, Invuse, supports our customers with ad hoc development projects within the product, or to create integrations that plug into the product. In the last 12 months Invuse have delivered over 40 development projects for customers that include new developments for the product as well as new applications to support other digital initiatives.

Invuse has a team of experts that will help you design, develop, test and deploy new developments whilst ensuring you pay close attention to the accessibility and UX side of things, to provide an inclusive experience for your whole audience.

To help you deliver your projects on-time and within budget, Invuse's dedicated project teams will work closely with you to deliver your projects end to end. With vast amounts of experience in the Public Sector, our project teams have a range

of skills and experience that can help you with any size project for your intranet and wider digital communications platforms.

Skills and experience offered:

- Project management
- Business analysis
- Training
- Development
- Solution architecture
- Content design
- UX design
- Accessibility review

Projects are priced using our rate card, with the price varying on the size and complexity of the project. We offer both a fixed price and time & material (T&M) commercial model, with all time logged for the project kept in a transparent project management application visible for customers to access.

## 9. Service Benefits

### 9.1. Client Portal and Helpdesk

As a customer of Invotra, you are never alone. One of our top priorities is ensuring that the organisations we provide our service to feel supported throughout their entire journey.

#### **Invotra Help Desk Portal**

The UK Helpdesk is available for UK Public Sector customers between 0700-1900 Monday-Friday, excluding Bank Holidays and national holidays.

However, customers will benefit from 24/7 support for any P1 incidents that are raised out of standard service hours.

Live Service - Service Level Agreements (SLAs) :

Ticket responses are bound by SLAs based on severity.

| Severity | Time to resolution |
|----------|--------------------|
| P1       | 4 hours            |
| P2       | 8 hours            |
| P3       | 24 hours           |
| P4       | 60 hours           |

Approaches to service monitoring, alerts, service report:

- Invotra monitors its live service 24/7 via AWS Cloudwatch
- Monitoring and alert triggers are automated to advise of adverse events related to live service (SMS/ email)
- Service reports are generated for each Invotra customer and yours can be reviewed as part of your Monthly Business Review (held by your dedicated Account Manager)

## Help and Support Documentation

Our developer space is available at <https://developer.invotra.com/> and will provide you with any information you need to help build and enhance your application throughout your contract.

## 10. Security and Accreditations

### 10.1. Security

At Invotra, we take security seriously. Our secure software is enhanced by our committed approach to information security and governance.

Our customers expect the very best from us and we never fail to deliver. All members of staff have an ongoing commitment to ensure that, as an organisation, we adhere to industry best practice and international standards.

From developing the code that underpins our products, all the way through to implementing best practices when designing and building the infrastructure which hosts the platform, security is always at the forefront of our minds and is reviewed and approved at multiple stages throughout all of our processes, internally and externally.

In addition to this, we use independent penetration testers for the product to ensure total visibility of security. Every aspect of the environment is constantly reviewed and updated in order to mitigate any possibility of future vulnerabilities.

### 10.2. ISO 27001:2013

We obtained the ISO 27001:2013 accreditation in 2016 to provide our customers the assurance that we adhere to the International Organization for Standardisation criteria for protecting information.

All areas of Invotra meet the requirements and we continue to have an ongoing commitment to information security.

Every year, we are internally and externally scrutinised against 35 security categories and 114 controls.

### 10.3. ISO 9001:2015

We obtained our ISO 9001:2015 accreditation in 2023 in order to provide our customers the assurance that we adhere to the International Organization for Standardisation criteria for quality management.

All areas of Invotra meet the requirements and we continue to have an ongoing commitment to quality management.

Every year, we are internally and externally scrutinised against 10 quality categories and 56 sub-clauses.

### 10.4. ISO 14001:2015

We obtained our ISO 14001:2015 accreditation in 2023 in order to provide our customers the assurance that we adhere to the International Organization for Standardisation criteria for environmental management.

All areas of Invotra meet the requirements and we continue to have an ongoing commitment to environmental management.

Every year, we are internally and externally scrutinised against 10 quality categories and 41 sub-clauses.

### 10.5. Cyber Security Essentials Plus

In addition to the ISO 27001:2013 certification, we undertook the Cyber Security Essentials plus certification.

The UK government scheme, supported by the NCSC (National Cyber Security Centre), sets out five basic security controls to protect organisations from around 80% of common cyber-attacks.

This certification provides assurance to our customers that Invotra's defences will protect against the vast majority of cyber attacks, keeping them and their information safe.

## 10.6. Disability Confident

We are proud to be a part of the UK Government's Disability Confident scheme. We believe that by being part of a range of employers who are committed to this scheme, we can help lead the way in equality for people with disabilities. We are helping to drive change through behaviours and cultures around employment and have already begun to reap the benefits of inclusive recruitment practices.

By being part of the Disability Confident scheme we can:

- Draw from the widest possible pool of talent
- Secure high quality staff who are skilled, loyal and hard working
- Improve employee morale and commitment by demonstrating that we treat all employees fairly



## 11. Business Continuity and Disaster Recovery

Invotra has fully tested and ratified Business Continuity and Disaster Recovery plans which ensure, not only basic service, but full operations of the organisation as a whole can continue should the need to activate the plans arise.

All systems and processes are driven from highly-resilient and distributed cloud-based services and all roles are able to operate remotely from any location.

Continual review and improvement of the plans are embedded within the operations of the organisation which is led by the CEO and Board of Directors.

## 12. Health and Safety Policy Statement

Invotra's statement of policy is:

- To provide adequate control of the health and safety risks arising from our work activities.
- To consult with our employees on matters affecting their health and safety.
- To provide and maintain safe equipment.
- To provide information and supervision for employees.
- To ensure all employees are competent to do their tasks, and to give them adequate training.
- To prevent accidents and cases of work-related ill health.
- Implement emergency procedures, including safe evacuation of premises in case of fire or other significant events.
- To maintain safe and healthy working conditions.
- To review and revise this policy as necessary at regular intervals.

## 13. Equal Opportunities Policy Statement

Invotra is committed to encouraging equality and diversity among our workforce, and eliminating discrimination as well as being committed to equal opportunities in employment and service delivery. We are committed against unlawful discrimination of customers or the public.

Our hugely successful apprenticeship programme, which has been recognised by winning multiple high calibre awards, allows us to develop a diverse, sustainable organisation that has an amazing culture and is truly embedded within the business, with all employees constantly learning and evolving.

In addition to our membership of the Disability Confident Scheme we work towards reducing the disability employment gap. As part of this we offer work experience to SEN students at a local school.

Invotra is fully committed to encouraging equality and diversity among our workforce, and eliminating discrimination. We are a meritocratic organisation. We value talent irrespective of its origin. The aim is to be truly representative of all sections of society, and for our customers and for each employee to feel respected, be wholly merit driven and able to give their best.

Invotra is committed to:

- Encouraging equality and diversity in the workplace as it is good practice and makes good business sense.
- Creating a working environment free of bullying, harassment, victimisation, and unlawful discrimination as well as promoting dignity and respect for all, and where individual differences and contributions of all staff are recognised and valued.
- Opposing and avoiding all forms of unlawful discrimination.
- Ensuring that no job applicant or employee receives less favourable treatment on the grounds of sex, race, marital status, disability, age,

part-time or fixed term contract status, sexual orientation or religion, or is disadvantaged by conditions or requirements that cannot be shown to be justifiable.

- The positive promotion of equality of opportunity in all aspects of employment.

This commitment includes training managers, and all other employees about their rights and responsibilities under the equality guideline.

Invotra believe that by encouraging equality, diversity and inclusion it can help:

- Make Invotra more successful.
- Keep our employees happy and motivated.
- Prevent serious or legal issues arising, such as bullying, harassment and discrimination.
- Better serve a diverse range of customers.
- Improve ideas and problem-solving.
- Attract and keep good staff.