

# VF Creator Service Definition



## VF Creator Electronic Cloud-Based Forms System.

### An overview of the G-Cloud Service:

VF Creator allows bespoke electronic forms to be created using an Add-In for MS Word, that are then placed in our Cloud Based system, Enterprise Forms Server, which presents, processes and stores completed electronic forms.

With a successful track record of eighteen years providing high performance, easy-to-complete intelligent eForms, clients benefit from Victoria Forms' unique eForms technology adopted by Councils and Government departments across the UK.

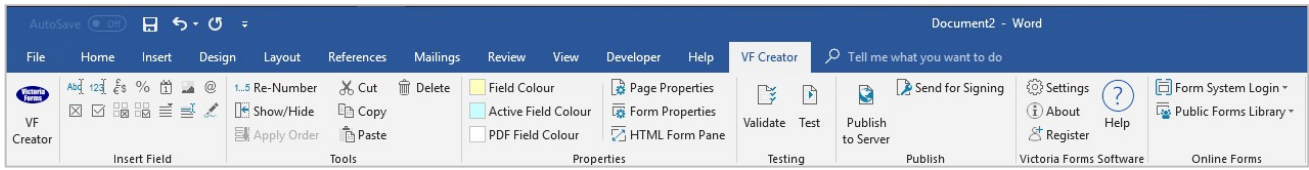
Forms can be created by the client, by our bespoke design service, or can be adapted from a library of ready-made forms supplied by Victoria Forms.

Initial Implementation includes Enterprise Forms Server (required); project management, training and SLA based support.

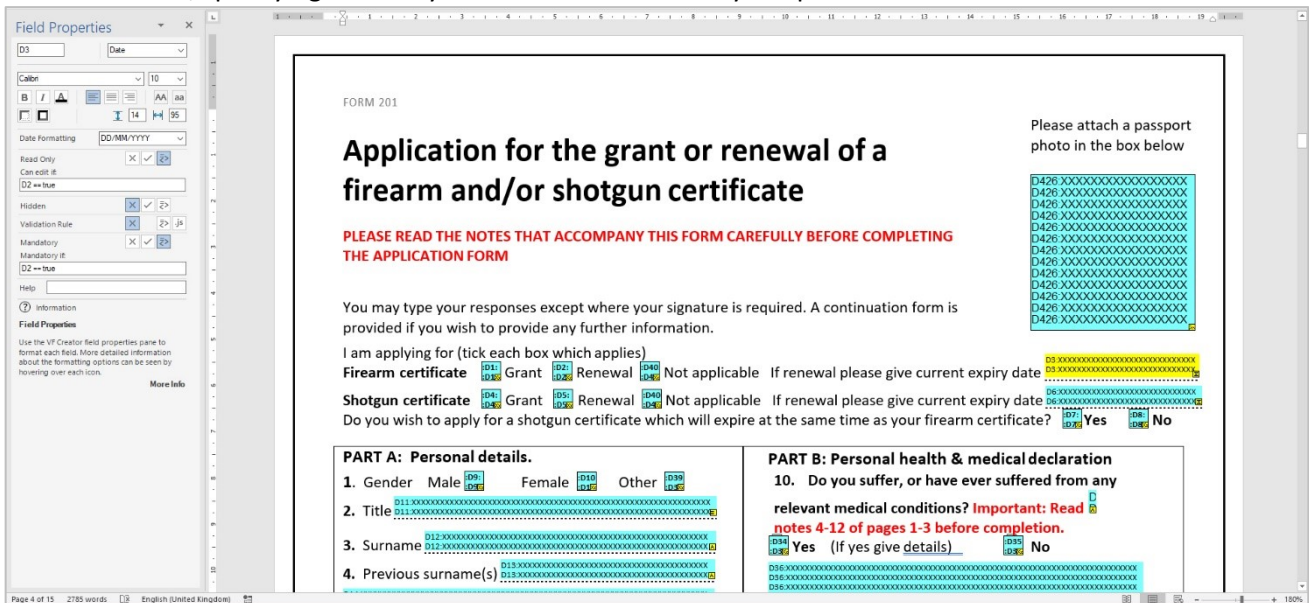
Clients can add to their setup at any time with products for defined Service Areas, as well as optional additional units, depending on requirements.

# Forms Design Software:

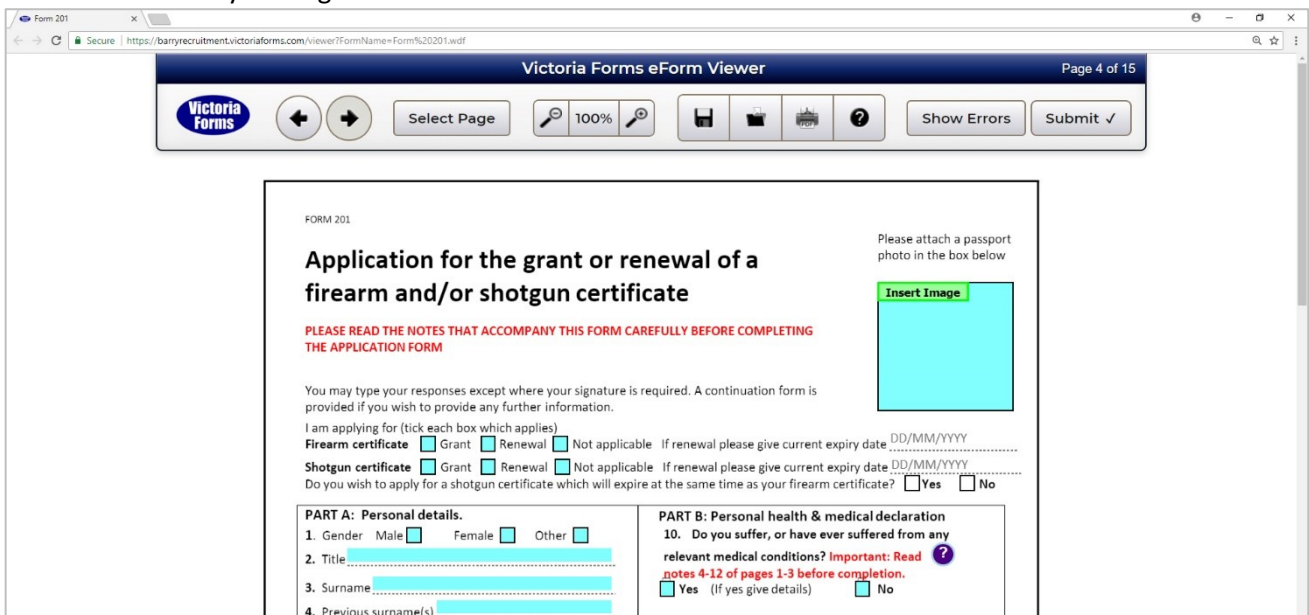
VF Creator is an Add-In for Microsoft Word which allows users to design, create and maintain eForms *within* Word. Forms can then be published to our server, which converts these into online eForms that end users can fill in on any device; in any browser without the need to have Microsoft Word (or a PDF reader) installed.



Users can take advantage of all the familiar features within Word, to create professional and stylish forms. Using our Add-in, form fields can be placed anywhere within the document. Properties can be set for individual fields, specifying how they are to behave when they are part of an online form.

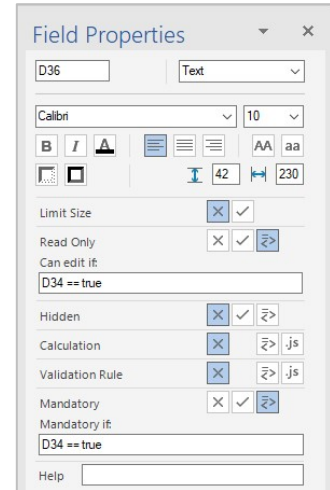


When the design of the form is complete, our server uses this template to generate a smart, online form. When forms are opened in a browser, they are displayed with an eForm viewer with form controls, which can be branded to your Organisation.

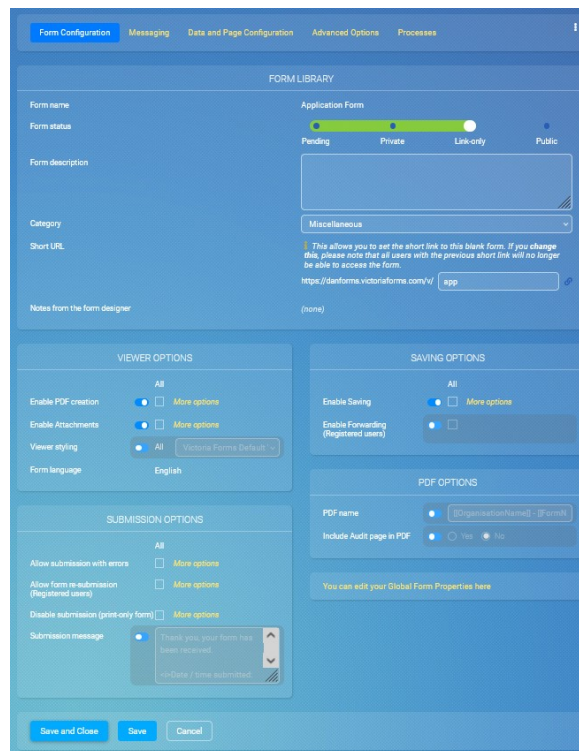


Many advanced features are available to forms designers, including:

- Field types including:
  - Text,
  - Numeric, Percentage & Currency,
  - Date,
  - Checkboxes or Tick-boxes (Including groups),
  - Email,
  - Droplists & Combo-boxes (Droplist plus free text),
  - Image,
  - E-Signature (on Screen – handwritten), + Advanced Options,
  - Button.
- Specified field sizes,
- Font, bold, underline, colour and alignment selection for Field data,
- Permanent or conditional,
  - Display of Fields,
  - Mandatory Fields,
  - Display of Pages.
- Validation rules,
- In-field calculations and scripts,
- Field by field help,
- PDF Quality Display at any zoom level,
- Email Notifications and Receipts.



Form Configuration within Enterprise Forms Server controls the way the form will be processed, such as the ability to save partially filled forms, creation of PDFs and emails to users and client staff upon submission.



These features are available alongside all of the numerous features within Word for designing documents, including: tables, shapes, images, styles, document styles, multiple languages, grammar and spell checking etc.



## Enterprise Forms Server:

Enterprise Forms Server is a powerful system which handles the presentation and processing of eForms.

Users are able to complete eForms with a standard web browser and they don't require any additional add-ons. Registered users, where access permissions allow, will be able to view completed eForms, download PDFs of completed application eForms, and manage workflow stages. Automated, staged communication is sent to customers, e.g. confirmation of an eForm having been received, as determined by the Administrator.

Internal or external users (an Organisation's customers) can be presented with a form exactly as the printed version will appear, or a dynamic web eForm, whichever is most appropriate to their needs and/or the device they are using. The printed-form style may be the preferred eForm format for professional users, given their familiarity with this eForm layout - speeding up the completion process as questions will appear in the same position and on the same page each time. Keyboard shortcuts can be used to speed up processing time, e.g. 'tab' to jump to the next field, 'spacebar' to tick the selected field, etc. External users, particularly those using mobile devices may prefer the dynamic option for ease-of-use and clarity as they are not necessarily familiar with the end-result form.

Depending on the previous questions answered, the eForm can expose / hide relevant questions or sections according to the previous responses. This simplifies the form for a user, as the only questions they see are those that are relevant to their needs – all non-relevant questions are hidden. Fields can be defined as mandatory or optional, ensuring the most important data is always captured.

An alternative text/accessible version of eForms can also be published, which enables the completion of eForms more easily on small-format mobile devices and to help users with Visual Impairments, e.g. those using screen reader software.

Features of our eForms technology include:

- The user can be guided through relevant areas of the eForm only and can be prevented from mistakenly entering data in the wrong areas. Whole pages can be hidden where not relevant.
- Date fields, drop down lists, text areas, check boxes, and currency fields can be used.
- Where helpful, guide messages can appear on the eForm that relate to what has been entered to prevent confusion e.g. "You must fill in question x before filling this section".
- Data Validation can be used, where appropriate, to ensure that the eForm captures high quality data from applicants, which both reduces form returns for the organisation and speeds up the process. eForms can check for obvious mistakes and omitted data. When initiated, the validation component will sweep through the eForm, highlighting errors, and giving the applicant the opportunity to make corrections.

Further features are provided to help users during eForm filling:

Top-level management information and statistics is made available for registered staff users to access and determine the number of eForms submitted, saved, being processed, etc. Very detailed statistical analysis is available via an optional reporting module, which enables the analysis of distinct eForm data fields from a selected range of applications.

An additional option for the eForms is the ability to capture electronic signatures – a user makes their signature with a stylus, mouse, or finger on a touch-screen, and the image of their signature will appear on the on-screen eForm. This overcomes the need to print a declaration page on home visits. **Advanced Electronic Signatures** are also available, inserting an automatic date/time stamp, allowing users to authenticate their signature with an email or SMS confirmation, as well as the ability to sign a form loaded on a desktop PC using a unique link sent to a smartphone - with the signature showing up in real time on a desktop screen.

## **Ready Made Forms & Forms Libraries:**

A range of ready-made forms are available, which can be taken on and customised, or used as a base for new form creation.

## **Back Office Integration:**

Victoria Forms can supply an API to allow selected submitted forms to be exported as XML files, to allow data to be integrated with existing Back Office Systems. We have 11+ years of working examples across a large number of Local Authority clients.

Victoria Forms are happy to work with clients to develop integration (where possible, and subject to full analysis) for Back Office systems if required.

## **Optional Additional Units**

### **Advanced Document System Integration:**

As standard, Enterprise Forms Server generates a PDF file that can be sent to a document system via email, or manual upload.

To automate this process, some document systems have facilities to import the form file, along with indexing instructions.

With some custom coding, our system can generate detailed indexing information for each form and send this along with the form, direct to the document system, in many cases allowing fully automated indexing. The indexing method depends on the document system and may require additional software from the Document System supplier.

### **Attachments / Evidence Collection:**

Attachment of electronic files to an eForm is available as an option for any eForm supplied. This option enables the attachment of pre-determined electronic file formats and set limits to their size (a 'white list'), as determined by the Administrator, limiting any risk to IT systems and the Client.

Images can be stored alongside eForms in the eForms server, and can also be exported to a document system as one package.

### **Offline Forms:**

Authorised users can create offline versions of forms, and download blank and partially completed forms to their tablets, laptops and pcs for completion where internet connection is unavailable, once completed the forms are held in a pending area, and automatically submitted when internet connection is available.

Offline Forms can work in conjunction with the Attachments / Evidence Collection Add-On for fully offline data and evidence collection.

### **Payment System integration:**

Where fees are applicable, forms can connect with your chosen payment provider to incorporate a seamless transition between form data and payments. Selected information can prepopulate the payment system, such as customer name, and validated email address, which saves time for the user and prevents errors for processing.

Additional customisations to the advanced payment processing functionality can be developed according to client specifications.

## **Campaigns:**

The Campaigns Module allows users to create a form template that can be sent to a pre-defined list of contacts (contact database) and track the responses.

When a Campaign is created, the system allows the user to select the form template, provide some details about the sender, and a date the campaign should begin. A customised email can also be defined.

The contact database can then be imported into the system, including recipients and any data which the user wishes to populate automatically into the form.

Automatic reminders can be set within the system, to encourage a better response rate.

The responses to the form are tracked within the system, providing the detailed status of each recipient and allowing the user to accurately monitor progress.

## **Processes:**

Enterprise Forms Server (EFS) now has the ability to add any number of 'Processes' to a Blank Form. When Processes is enabled, forms can be configured to automatically forward to a user or email address when submitted – for amending, providing additional information or approval. This can be configured to happen any number of times, depending on how many people are needed for approval, and each step can be conditional on form data. Email notifications or receipts can also be configured to be sent at any stage so staff are kept informed.

There are currently three 'Available Processes' which can be added to a form:

- Forward Form and Return Message to User,
- Send Receipt Email,
- Send Notification Email.

Additional types of process may be available in the future.

Processes can be used for more complex scenarios, which involve changing behaviour of the form itself based on stage of the processes the form has reached. Fields can be made 'read only' after each process stage, ensuring that data cannot be edited, for example.

## **Advanced Electronic signatures:**

Advanced Electronic signatures allow additional validation for online signatures – preventing a form from being altered after signing, allowing 'signature' without the need for a touchscreen device, and providing an additional level of authentication for the signee.

Form builders can specify additional options for the signature fields: Signature Type; authenticate user; Data integrity check, and a pre-populated Signature Date field.

## **Information assurance:**

For high-security applications the Victoria Forms system provides a two-server setup as a Cloud solution.

The eForms System is hosted on secure servers, provided by the client, or by Victoria Forms, from where converted eForms in PDF format, or XML data can be sent to the client's secure server / back-office system via a SOAP request over HTTPS (where these additional options have been procured). All data held is encrypted securely.

Where Victoria Forms provide hosting, the eForms System is hosted with Microsoft Azure and data is encrypted using Microsoft Azures Transparent Data Encryption (TDE).

To help organizations comply with national, regional, and industry-specific requirements governing the collection and use of individuals' data, Microsoft offers the most comprehensive set of certifications and attestations of any cloud service provider. For further details, please view Microsoft's Compliance website located at:

<https://www.microsoft.com/en-us/trustcenter/Compliance>

## **GDPR:**

Victoria Forms systems have a built in data-cleanse facility, which can be set to permanently delete data from the system after a set period of days, as specified by the Buyer.

Customisable forms and configuration options ensure that bespoke Privacy Policy details can be included within every form.



## **Public Facing Cloud Server:**

The public facing server allows applicants to complete forms via a public URL.

Data from part-filled forms can be retrieved with a reference code.

The system is accessed using any browser. All communication is made over HTTPS, using signed SSL certificates installed on the server. Members of the public or staff assisting them can complete online application forms.

Public-facing forms will work with or without JavaScript, and are accessible, including when used with screen reading software.

## **Private Cloud Server:**

The private server stores completed Application eForms and the constituent client data. This data is only available for staff registered users only, whose user permissions also determine exactly what each user can view or action with regard to completed applications received.

This server DMZ is configured to respond only to the client's own IP address. Requests received from any other IP addresses are ignored. The private server is effectively invisible to the internet.

All communication with the staff's own computers is done over HTTPS, using signed SSL certificates.

## **Application Software:**

VF Creator is written in a combination of VB.NET and C#, (Frameworks 4.0 and 4.5.2) using *Visual Studio Tools for Office*.

The eForm System software application is written using a combination of ASP 3.0 and C# with ASP.NET (Frameworks 4.0 – 4.6.1).

The server application (running separately as a scheduled task) handles export to back-office systems as PDF, TIFF and XML (where relevant and purchased as an optional service). This application also handles export of attached images.

## **Browsers:**

eForms work with all modern web-browsers including Internet Explorer, Firefox, Chrome, Safari and Opera. No additional extensions or add-ons are required.

For visually impaired users accessing forms through screen-reading software, forms can be displayed as HTML web-forms.

## **Installed and maintained Anti-Virus Software:**

Anti-virus software is installed and maintained on all Victoria Forms' servers with automatic updates.

## **Open standards supported and documented, and use of open-source software:**

Victoria Forms aims to support open standards and enable our solutions to integrate with other systems, where appropriate.

Open standards supported by Victoria Forms include:

- XML input / output,
- SOAP web services,
- CSV output of structured data files.

## **Details of the level of backup/restore and disaster recovery that will be provided:**

Our servers are hosted by Microsoft Azure in the UK. In the unlikely event of the primary server failing, a new server will be instated, with all the backed-up data within 24 hours.

The system runs under a Windows Virtual Server environment. Server resources can be increased at any time, ensuring adequate server power is always available.

Data is stored in Microsoft Azure SQL Server.

Backups are taken daily and are executed as part of Microsoft Azure's Recovery Services.

## **On-boarding and Off-boarding processes/scope:**

The On-boarding requirements are determined with the client prior to service commencement to ensure an appropriate setup, branding and included services. Victoria Forms will provide a Project Manager for this implementation phase, supported by its Consultants, eForms Designers and Technical Support Team.

Timescales and project milestones will be discussed and set as mutually agreed. If additional optional modules are procured, e.g. integration with back-office systems, this may affect the timescales for full implementation.

The linking to eForm(s) branded and hosted for you is extremely easy. There is no need for web designers to embed the eForm into your website. All that is required is to provide a link from your website to the appropriate eForm (the appropriate link will be provided by Victoria Forms or when you publish the forms yourselves). When a user clicks on the link, the appropriate eForm will open up in a new browser window on the user's computer.

Victoria Forms will simply require confirmation of the client details in order to configure the system to its needs. Depending on any optional requirements for e.g. integration with back-office system(s) via XML, other details may be required in order to implement these additional requirements.

Where required by the client, Victoria Forms can provide a Test and Evaluation phase in the implementation of services, whereby the client will be able to test the service provision. The test system will be configured at no additional cost and the client will provide reasonable service acceptance in a timely manner. This will require the timely testing and feedback from the client to ensure this testing phase can be completed in the shortest possible time.

Off-boarding is straightforward; given the data being captured by the system in a submitted eForm is used or captured by the client for its own on-going processing and record keeping regularly. Therefore, any data held will be already captured by the client. Victoria Forms can provide an additional access period to the database, by arrangement if required, for the client to download any further eForms submitted in the last days of contract provision, to ensure it has sufficient time in which to download these and capture the included client data. When the client has confirmed it has downloaded all records from the system or the

additional access period has finished, Victoria Forms will permanently delete all data held securely under contract, including any backups to ensure it satisfies all its GDPR requirements.

### **Service management details:**

Where Victoria Forms provide hosting, the eForms System will be hosted by Microsoft Azure. Microsoft's data centers are engineered to provide 99.999% availability to meet their client's SLAs and service needs.

Victoria Forms Target Service Availability: 98+%

As a minimum, email and telephone technical support is provided during the hours of 9:00-17:00 Monday to Friday (or as agreed otherwise with the client, including an out of office emergency contact number), excluding national and other public holidays in England, as a minimum. Response times for logged/received technical queries will be within 1 hour and resolution of issues in accordance with our Service Level Agreement timelines, as detailed below under "Service Levels."

### **Service constraints:**

The Core Software runs on Windows Operating Systems.

## Service Levels:

| Description:  | Service Level Target:   | Comments:  |
|---|---|--|
| Target Service Availability:                                    | 98+%  | 98+% uptime guarantee does not include scheduled maintenance - normally conducted outside working hours and as previously notified.  |
| Service Desk Support Hours:                                     | Monday to Thursday:<br>09:00 to 17:30 GMT,<br><br>Friday:<br>09:00 to 17:00 GMT.                  | Excluding English bank and public Holidays and between Christmas and New Year. Out of hours technical support is available upon request and as mutually agreed.  |
| Initial Response Time:  | 60 Minutes.   | Target response time for the Service Desk to respond to any queries or requests for support or Service Requests. Initial Response Time taken from time of receipt of email / call requesting support that contains all required information.   |
| Incident Management Response Times:                             | Priority 1: 60 Minutes,<br>Priority 2: 180 Minutes,<br>Priority 3: 24 Hours,<br>Priority 4: None. | IM target response time starts from Initial Response Time.<br>No Service Level defined for Priority 4 Incidents, as they are logged for information purposes only.   |
| Unique Record created for all Service Requests?                 | Created for all Service Requests.   | An Incident Record will be created for all Service Requests handled by the Service Desk.   |
| Resolution of Priority One Problems Caused By Hardware Failure: | Within 24 Hours.  | Will normally require implementation of an Urgent Change.  |
| Client Data Backup:   | Critical data – Daily,<br>Other data – every 3 days.  | Full back-up of all Client data.   |
| Anti-Virus Software Installed:                                  | On all the hosted servers.  | Kept up to date with daily automatic updates from Anti-Virus software vendors.<br>Does not guarantee virus-free files, each user must run their own anti-virus software to ensure that they do not download or propagate virus infected files. |
| Named Account Manager:  | For Each Client.  | Responsible for managerial and enquiries that do not fit in the remit of the day-to-day delivery of services by the Service Desk.  |
| Response to bespoke enquiries:                                  | One week.   | All enquiries must be raised via the Service Desk.   |

## Training:

Victoria Forms' success in the uptake of its eForms technology is in some part due to its ease of use and Administration.

Depending on what is appropriate for a client's needs, there are various means for the provision of training. Detailed manuals on how to use the system elements is included with the solution offered, in addition to the option of complimentary initial self-training resources. Where required, reasonable provision of webinar training can be provided. Where the onsite training is requested, a charge may be applicable and this will be detailed clearly in advance, if this option is raised as a possible option to be considered.

## Ordering and invoicing process:

Clients should follow the G-Cloud Guidelines for making orders through G-Cloud. Invoicing is annually in advance, payment due net 30 days of invoice date. Where any initial setup of additional/optional services has been selected, an initial setup fee may apply and will be added to the first invoice. Payment is via BACS payment or cheque (cheques must be received one calendar week prior to the due date).

## Data restoration / service migration:

Data is backed up daily. If there was any data loss by the system, e.g. due to a hardware failure, all data from the latest backup would be restored within 24 hours of its known loss with the most recent backup with stable and usable data.

Given the client will have ongoing access to the data and will be downloading this data regularly, there is no expected need for the supply of data for migration purposes, given this data will have been used to update the client's own database(s).

## Client responsibilities:

The client will need to provide Victoria Forms with the following:

- Branding information, including but not limited to its logo file, contact details for inclusion on eForm(s) and either a web link or mock-up for any customised viewer/filler commissioned.
- Primary, named contact at the client for service Administration-related activities and queries.
- Technical liaison and testing resource within the client for Victoria Forms' integration with the client's back-office systems, where this option has been procured.
- Confirmation of the IP address that will be used by registered client internal users for accessing the Administration management interface for the system.

The client will also be responsible for the setup of registered user profiles on the system for staff users to access the system, e.g. for downloading completed eForms, etc. This is very straightforward to do and does not require any specialist IT skills.

## Technical requirements:

Access to any of the leading web browsers with an internet connection is all that is needed for both client staff and its customers to access the eForms (and the Administration interface for appropriately registered staff).

To design Forms using VF Creator, the client will need access to Microsoft Word 2010+ (not Office online) and have privileges to install Word Add-Ins on your PC. Where this is not feasible, Victoria Forms offer a Design Service, and can design eForms on your behalf.

There are no other requirements, unless integration with back-office systems is required, in which a small application on one of the client's servers will need to be installed, in order to receive secure data from the private cloud server, which holds submitted data. This can be installed on a shared in-house server.

### **Support for Information Principles:**

The inherent capabilities and structure of the Victoria Forms solution enables the secure protection of information, whilst enabling the detailed querying of that data for re-use and further information by those with the necessary remit and authorisation to do so. The Enterprise Forms Server, which manages submitted information, is able to be integrated with other systems for the publication and/or further use of the data, where such requirements exist, are authorised and meet with all GDPR legislation. These integrations are possible due to the solution's open standards support, enabling these integrations via web services/open APIs and XML. Please note that the more advanced integration and/or communication with other systems and services would incur additional cost, given these are not included within the standard solution pricing (for the services as defined in this Service Definition).

### **Support for ICT Strategy and Greening ICT Strategies:**

Victoria Forms' solutions have always been agents for channel shift, reduction of wastage, greater administrative efficiencies and reduction of environmental impacts in achieving the same end result, when compared to other existing processes and solutions. Using tried and tested technologies, Victoria Forms has developed a unique offering that improves system stability up-time and scalability for users. This is further supported by the solutions having the open software architecture as described previously, enabling these integrations via web services/open APIs and XML. Please note that the more advanced integration and/or communication with other systems and services would incur additional cost, given these are not included within the standard solution pricing (for the services as defined in this Service Definition).

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