

Cloudoko Forms

G-Cloud 15 Service Definition

T +44 (0)1904 500808 | **E** support@cloudoko.com | **www.cloudoko.com**

Cloudoko Ltd is registered in England & Wales under company number 09294405 | Registered office: 1 Derwent Business Centre, Clarke Street, Derby, DE1 2BU

Service overview

Cloudoko Forms is a design and runtime platform for delivering powerful, accessible and responsive forms to be used standalone or embedded in your website pages. This service takes care of the complex integration required to store completed forms in your Customer Relationship Management (CRM) system or other data store.

This service was designed from the outset to run in the Cloud and to require minimal technical skills of the people who work with it.

Benefits to you

- Develop new “digital” business processes quickly and easily
- Bring existing processes online through your website
- Integration with CRM is a complex activity - our service takes care of the hard work for you
- Achieve savings by moving existing CRM processes online where per transaction costs are lower
- Increase ROI in CRM and Business Process Re-Engineering (BPR)
- Reduce development and maintenance costs through business process re-use
- Increase customer engagement with enhanced functionality on your public website
- Can be used as an internal mobile worker solution
- Supports 100,000’s of transactions/month and scales to your needs
- Support portal staffed by engineers responsible for the development
- Short term commitment (30 day no quarrel cancellation policy)

Key features

- Fully responsive mobile-first forms
- Rich interface for configuring forms (no “coding” required)
- Supports common customer scenarios (mandatory / non-mandatory / anonymous)
- Support for authenticated customers when combined with Cloudoko Identity
- Supports common location scenarios (LLPG address / street)
- GIS integration for improved location capture (Google / ESRI)
- Migration capability to move forms between Development/Production environments
- Connector available offering full Lagan CRM e-form integration
- Connectors to other CRM systems/data stores available on request
- Connects securely to your internal systems (no VPN required)
- Simple setup process (see **On-boarding process** below)

My Cloudoko

Cloudoko Forms is delivered through our web site at www.cloudoko.com/admin. This area of our site is known as “My Cloudoko” and is the mechanism by which all our Cloud Services are delivered. Customers can log in to the site using credentials which will be created when the service is first activated.

Once logged in to My Cloudoko, you will be presented with a list of Cloudoko environments. We recommend that you have a non-production as well as a production environment so that you can develop and test your online forms before making them available to your users.

User experience

We have worked hard to ensure that managing our services through My Cloudoko is as intuitive as possible, with minimal clutter in the user interface, enabling users to quickly get to grips with the application.

The interface is bright and clean and makes frequent use of graphical icons, and colour coded buttons that infer context behind their action.

Primary navigation

Primary navigation is provided consistently on each page by the horizontal blue bar running across the top of the screen. This allows users to switch quickly between the environments they are controlling, access their profile, or sign out.

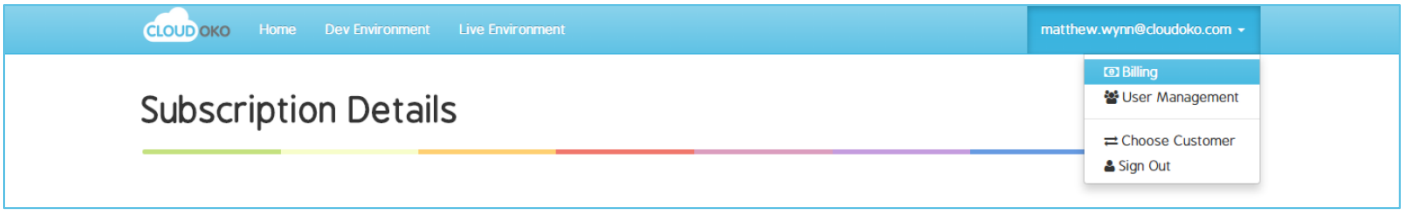


Figure 1 – Showing primary navigation in My Cloudoko

Secondary navigation

Secondary navigation in My Cloudoko is provided below the main heading on each page, and enables quick access to the key functions of the service the user is currently working with. At the far right of the secondary navigation, users will frequently find a “Help” button which offers useful guidance on the operation of that function. This assistance is backed up further by our Knowledge Base which contains useful articles on the more advanced features offered by our service.

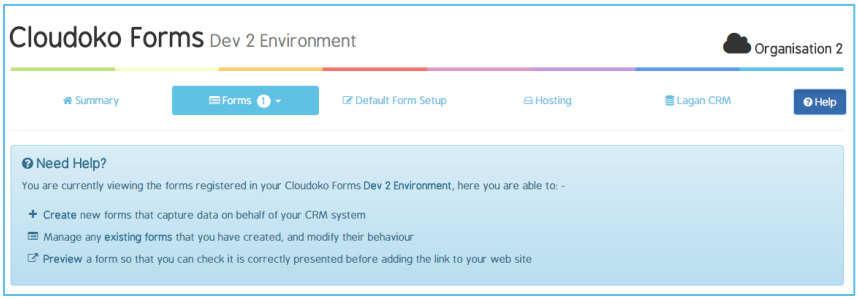


Figure 2 - Secondary navigation and help

Creating and managing forms

Cloudoko Forms is capable of managing an unlimited number of forms sourced from and stored in multiple back end systems. Our service has been designed such that it can easily accommodate thousands of transactions per day and can scale to meet your needs.

Our innovative Forms Driver architecture powers highly configurable design and runtime environments for forms running in our service. Configured connectors handle the flow of captured form data and its communication back into your internal systems.

Depending on the configuration of your service, we can enable multiple drivers (including our own native **Cloudoko Forms Driver**) affording your users maximum choice in how they wish to work with forms.

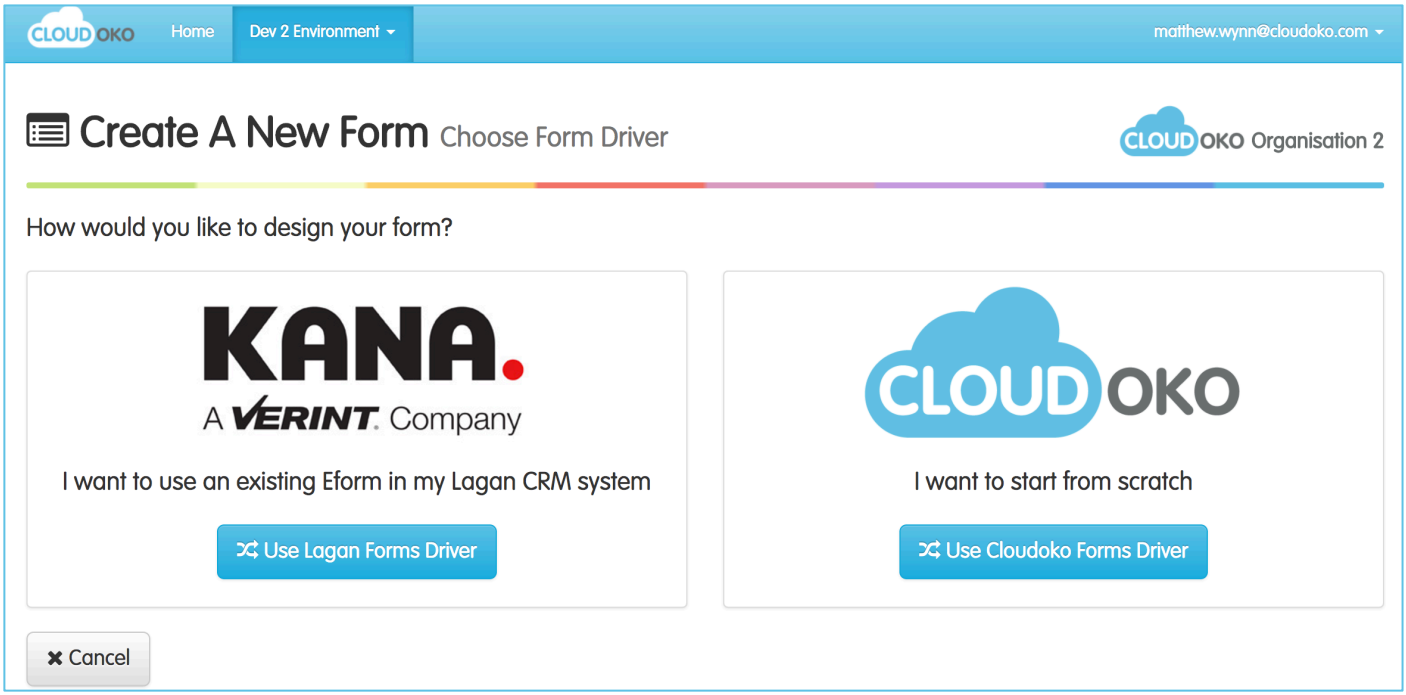


Figure 3 - Showing Forms Driver selection

Cloudoko Forms Driver

New for G-Cloud 9, our native Cloudoko Forms Driver is a feature rich design and runtime environment for building responsive forms. By offering access to all the best Bootstrap framework features, our designer makes it easy for your users to create attractive user interfaces which your customers will find simple to complete.

Our designer offers WYSIWYG style editing and a drag-and-drop toolbox packed with useful form controls. For users that prefer a bit more control, we also offer full XML source editing.

Lagan Forms Driver

Our customers frequently find that the Lagan Eforms engine does not support all of today's complex self-service interactions. There are often hundreds of business processes inside our customer's Lagan CRM system which they would prefer to not have to redevelop in a new forms technology. Cloudoko Forms allows customers using the Lagan system to maximise the return on their original investment by re-using their internal business processes whilst simultaneously avoiding disruption to the internal organisation. See **"Re-working your internal CRM forms for online use"** for more information.

Creating a Cloudoko Form that uses the Lagan Forms Driver is a simple activity that requires knowledge of just a few attributes of the business process that you wish to move online.

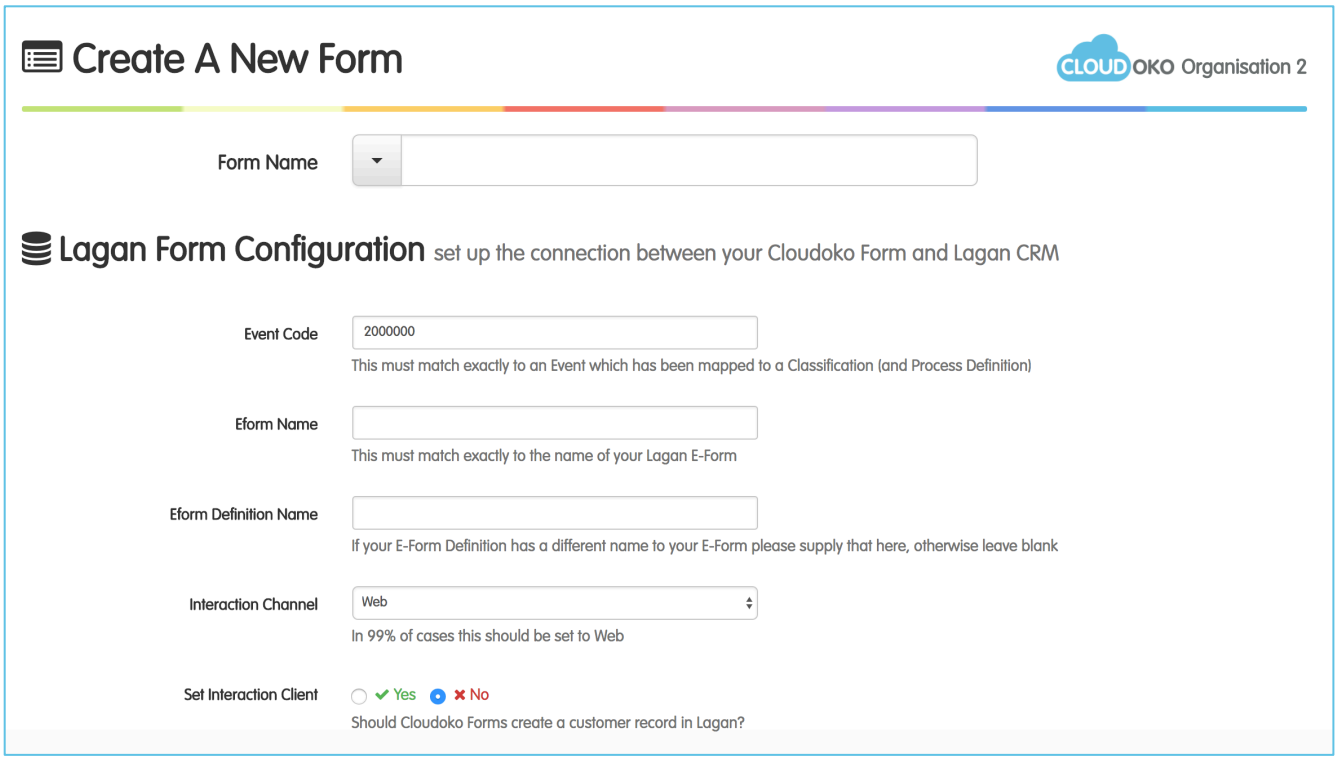


Figure 4 - Showing Cloudoko Form creation for a Lagan CRM system

Template Flow : Common self-service form scenarios

Cloudoko Forms comes with a number of self-service scenarios built in to the product. We refer to this as “Template Flow”.

Customer data capture

We have support for 3 customer scenarios out of the box: -

1. **No** customer
2. **Optional** customer
3. **Mandatory** customer

When combined with **Cloudoko Identity** (our service for managing authenticated users and their profiles) 2 additional options are included: -

4. **Authenticated** customer
5. **Optionally authenticated** customer

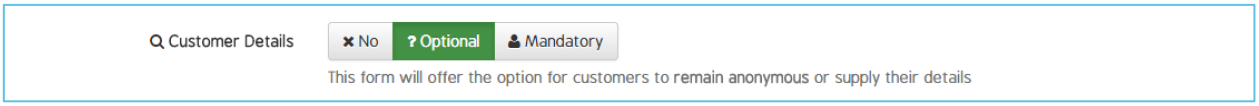


Figure 5 – Showing built-in customer data capture scenarios

Location data capture

Cloudoko Forms also comes with 4 location capture scenarios out of the box: -

1. **No** location
2. **Address** based location
3. **Street** based location
4. **Address** or **Street** based location (useful for processes that can be either)

The above scenarios may also be optionally combined with an interactive map encouraging the customer to provide a pin-point of the issue location. Our mapping functionality currently supports the following mapping APIs: -

- Google Maps API V3
- ESRI ArcGIS for JavaScript API.

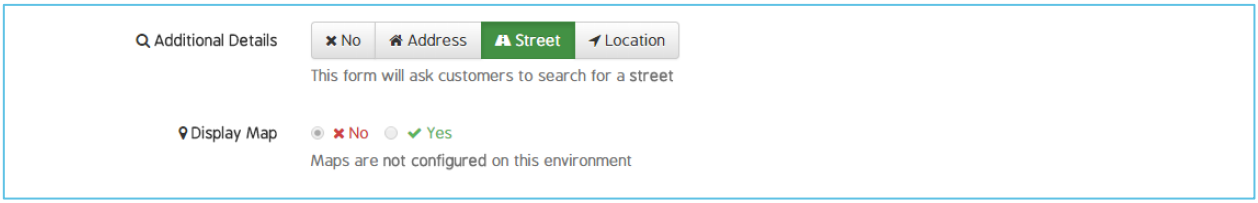


Figure 6 – Showing built-in location data capture scenarios

By taking advantage of these built-in features, you can ensure that customers will see consistent behaviour across each transaction that they carry out through our service.

Re-working your internal CRM forms for online use

When you first publish your internal forms online using the Cloudoko Forms service, it's likely that you will notice certain things that don't work well in front of an online customer. This might be the wording of a question, or a whole section of the form may be irrelevant in a self-service situation.

Other vendors would at this point typically recommend one of two solutions to this problem:

1. Re-write the original form to be more suitable for a self-service customer.
2. Create a 2nd (duplicate) of your business process with an amended form for use by self-serving customers.

At Cloudoko, we believe that neither of these are helpful solutions, as it unfairly puts the onus on you, the customer to change your processes to work with the software that you have bought.

We work tirelessly to maximise the amount of re-use of your existing business processes we can get, without having to change the source CRM configuration.

By working this way, we have developed a number of principles of web self-service that we try and advise our customers to adhere to: -

- Keep the process **consistent** and **simple** for your customers
- **Don't** use over-complicated / business language in your forms
- Design a single process that can be used across **all** channels
- Make **minimal changes** to the existing CRM process

Occasionally, we find that the latter principle is at odds with the first three, especially where your CRM processes were not originally designed with self-service in mind (which is not un-common for us to find).

Fortunately, **Cloudoko Forms Designer** provides assistance in adhering to all of these principles.

Cloudoko form designer – a cost effective way to improve the reach of your CRM system

We believe that our customers should not require expertise in HTML / JavaScript to be able to provide a self-service offering to their customers.

Corporate CRM is likely to be one of the largest IT investments within a public sector organisation. We often find that there is a shortfall of internal knowledge about the configuration of the CRM.

This can pose problems for organisations looking to venture into the world of digital self-service.

The Cloudoko Forms Designer addresses these concerns by offering a WYSIWYG interface with simple but comprehensive configuration capabilities.

Core features

The Form Designer is an intuitive tool for creating new forms or modifying the appearance of existing CRM forms when presented via the Cloudoko Forms service.

When working with existing CRM forms, it is important to note that changes made in the form designer **do not** affect the core CRM form, only the online form. This is a key feature of our service, allowing a single form to work across multiple channels, whilst requiring minimal / no change to the existing CRM process.

The forms designer also allows: -

- Removal of unnecessary sections of the existing CRM form
- Re-working the language of questions to be self-explanatory to an online customer

The designer interface

We employ a “point and click” interface to control the design of Cloudoko Forms.

The impact of changes made through the designer can be seen instantly in the preview window. This provides assurance to the user that the changes will work as intended when they publish the form to the web.

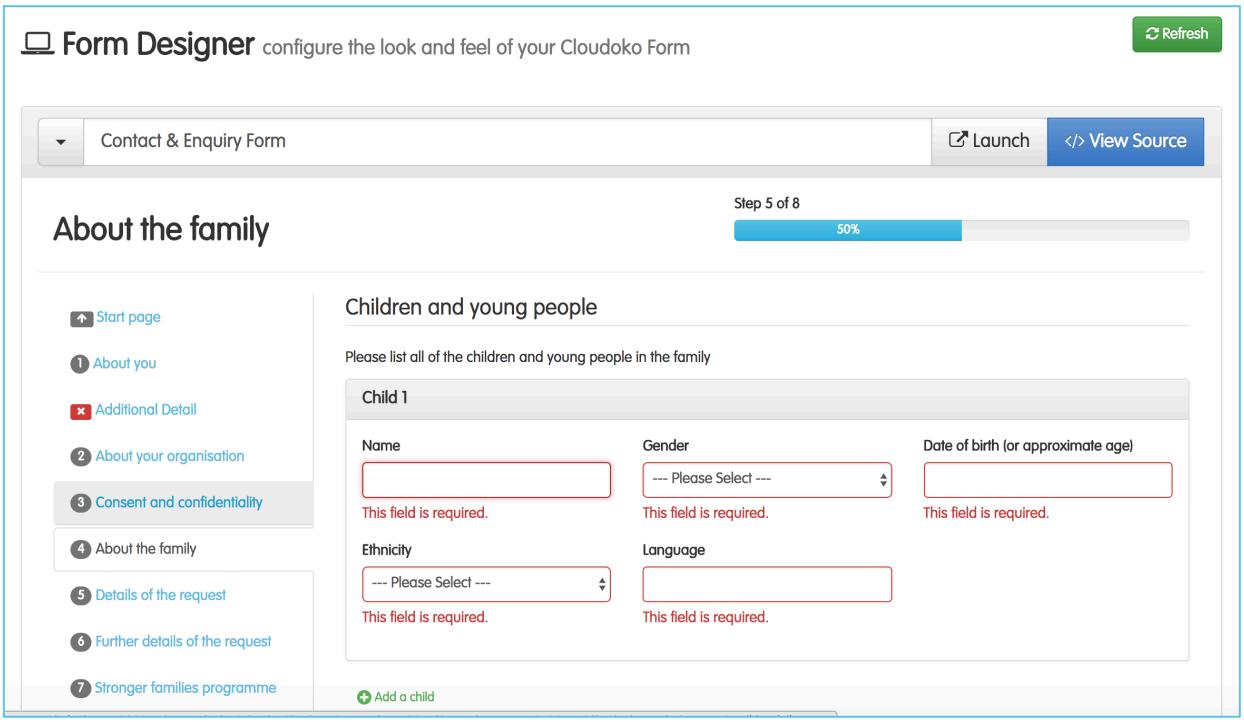


Figure 7 - Form designer interface

Managing existing forms

All forms capabilities can be seen at a glance via the dashboard view: -

- The core features of a form can be seen without opening individually.
- A "**Launch Form**" button enables each form to be viewed quickly in a separate browser window.

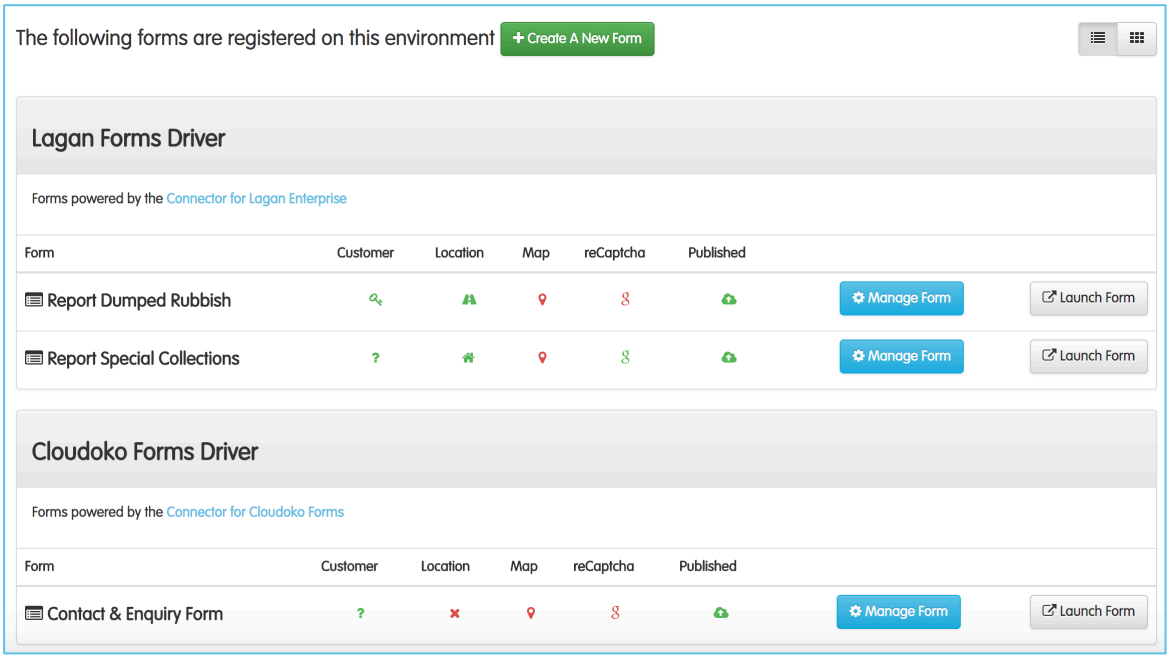


Figure 8 - Existing forms list

Trial service

We offer a free 30-day trial period to evaluate our service. The service is fully functional during the trial period and is initiated by the set-up process detailed below. Extensions to this trial period can be negotiated on a case by case basis.

On-boarding & set-up process

Upon receipt of an order, we shall jointly agree an **effective date** for your service to commence. The monthly anniversary of this date shall become the **invoice day** each month for your Cloudoko Forms subscription.

Nominated service users

Once we have received a signed service order form, we will ask you to provide the names and email addresses of the people you wish to nominate for the following roles in your organisation.

- **Billing contact(s)** – the person(s) who will receive invoices, and view the Cloudoko Billing portal
- **User manager(s)** – the person(s) who will be responsible for providing access to your Cloudoko Forms service to other individuals in your organisation.
- **Service desk user(s)** – the person(s) who will require access to our service desk to raise technical issues.

Technical installation

Our cloud service does **not** use a VPN connection to connect to your network.

We employ our own software known as the **Cloudoko Driver** which initiates an outbound connection to our Cloud infrastructure by way of a secure Service Bus Relay provided through Microsoft Azure.

A key advantage of our approach is that we do not require your network administrators to open inbound ports on your firewall for our service to function.

A Cloudoko Driver installation is required for each Cloudoko Environment you wish to run (e.g. Development / Production).

The server(s) where you install the Cloudoko Driver must have access and permissions to:

- Connect to your CRM SQL database (in read-only mode)
- Connect to your CRM web services / API (where applicable)
- Establish an **outbound** connection to a secure Service Bus Relay running on Microsoft Azure infrastructure.

- N.B. We provide connectivity checking software with the Cloudoko Driver installation to ensure that the correct outbound ports have been enabled.

The Cloudoko Driver software for each environment can be downloaded and installed from the My Cloudoko site once we have enabled your service. Full instructions on the installation process can be found on this guide in our Knowledge Base.

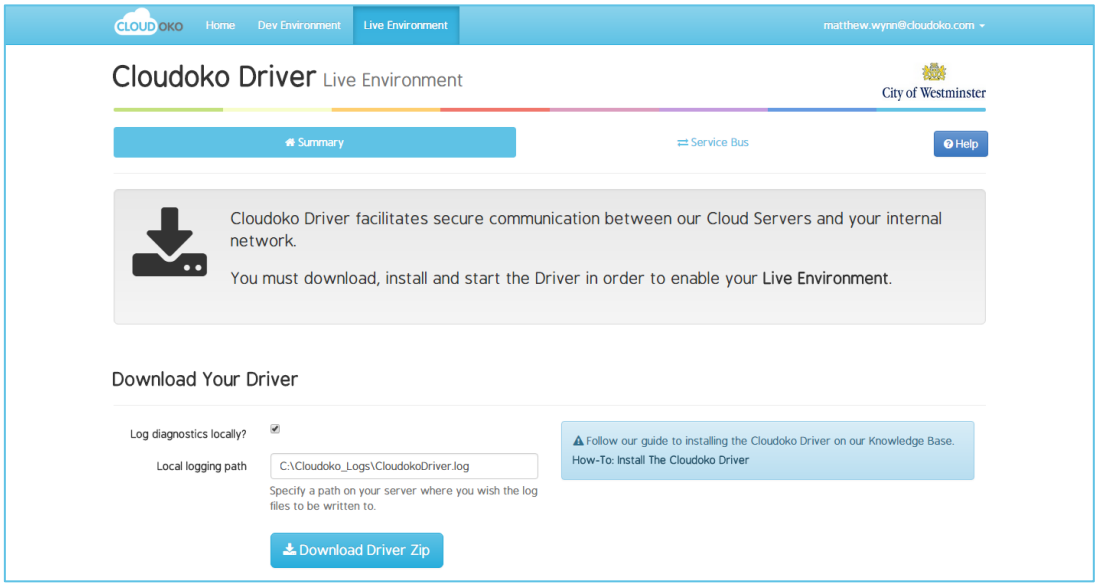


Figure 9 – Showing Cloudoko Driver software download page

Invoicing process

We invoice monthly by email to the nominated **billing contact(s)**. In addition to this we also provide access for these individual(s) to the billing area of the My Cloudoko site. The billing area enables users to view the active subscriptions they hold with Cloudoko including all invoices raised and can assist with your financial reconciliation processes.

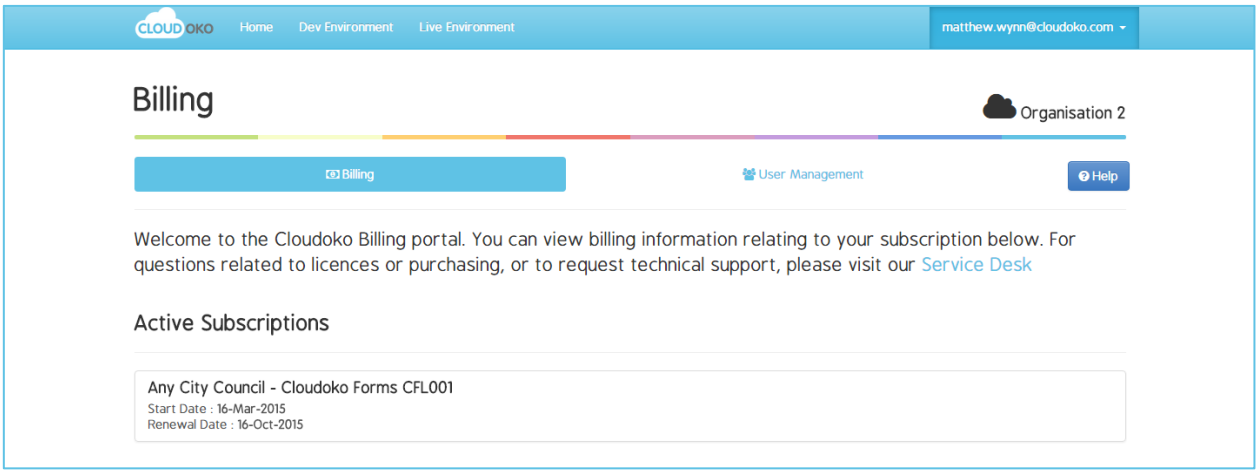


Figure 10 - Cloudoko subscription management

Off-boarding & cancellation process

You may cancel your Cloudoko Forms subscription at any time to conclude on the final day of the month next following the expiry of a minimum of 30 days' notice. Example 1: if notice is served on 27 March, the Subscription for this Service Offering shall expire at 23:59 on 30 April. Example 2: if notice is served on 2 April, the Subscription for this Service Offering shall expire at 23:59 on 31 May.

Upon expiry of your subscription, you should un-install and delete all copies of our Cloudoko Driver software. We will disable your access to the My Cloudoko portal and remove your Cloudoko Form installations from our cloud servers.

Backup and disaster recovery

Our service reads the configuration of business process held inside your CRM. Therefore, much of the data is already stored by your CRM software. We store only a minimal amount of configuration data which comprises the following:

- Configuration data that tells our service how to connect to your CRM system
- Configuration data that tells our service which forms you have defined and how to connect to your CRM system to retrieve them
- Logs of transactions raised against your CRM system through our service

This data is stored in SQL database servers in our cloud network which are continually backed up and can be restored back to the previous day.

We do not store any data about your customers.

Service levels

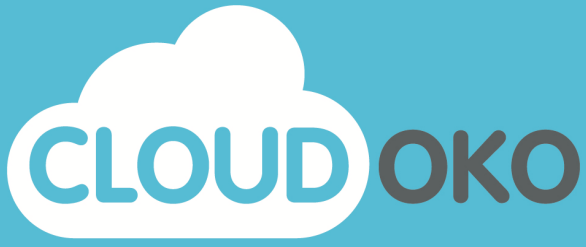
As per clause 9 of our subscription agreement we shall use commercially reasonable endeavours to make our service available 24 hours a day, 7 days a week.

Our typical maintenance window is between 10pm and 2am UK time.

Our service desk is open during normal Cloudoko business hours (9am – 5pm UK time), however we do monitor the desk outside of these hours and will respond to emergency situations.

Training

As part of the service installation, we will commit to providing one day's training on site. Further training can be arranged at the rates discussed in our SFIA rate card.



www.cloudoko.com