

Cloudoko Hub

G-Cloud 15 Service Definition

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Service overview

Cloudoko Hub enables access to a single customer record. It helps your organisation improve its customer service by employing “Connectors” to back-office APIs to retrieve their records and present them in a unified view consumable by your website or CRM. The service works in conjunction with Cloudoko Forms.

Benefits to you

- Can be used to implement a “single view of the customer”
- Develop advanced “digital” business processes quickly and easily
- Personalised customer service journeys driven by your data
- Increase back office productivity by allowing customers / agents to self-serve
- Increase customer engagement through “my account” functionality on your website
- Improve the effectiveness of your CRM system by surfacing back-office information
- Supports 100,000’s of transactions/month and scales to your needs
- Achieve savings by moving processes online where per transaction costs are lower
- Integration with third-party APIs is a complex activity - our service takes care of the hard work for you.
- Reduce development and maintenance costs through business process re-use
- Support portal staffed by engineers responsible for the development
- Short term commitment (30 day no quarrel cancellation policy)

Key features

- Responsive mobile-friendly dashboards displaying customer and location records
- Provides CRM / online access to information previously locked away in back-office systems
- Extensible Connector architecture works against any system with an API
- Connector available for Lagan CRM
- Connector available for Council Tax (Northgate)
- Connector available for Benefits (Northgate)
- Connector available for Social Housing (Northgate)
- Connector available for Blue Badge Improvement Service (Northgate)
- Connector available for Waste & Recycling (Mayrise)
- Connector available for Document Management (Northgate Images)
- Intuitive user experience for customers and staff
- Support for authenticated customers when combined with Cloudoko Identity

- Full integration with Lagan Agent Desktop
- Connects securely to your data stores (no VPN required)
- Simple setup process (see **On-boarding process** below)

My Cloudoko

Cloudoko Hub is configured 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 dashboard processes before making them available to your users.

Administrative 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.

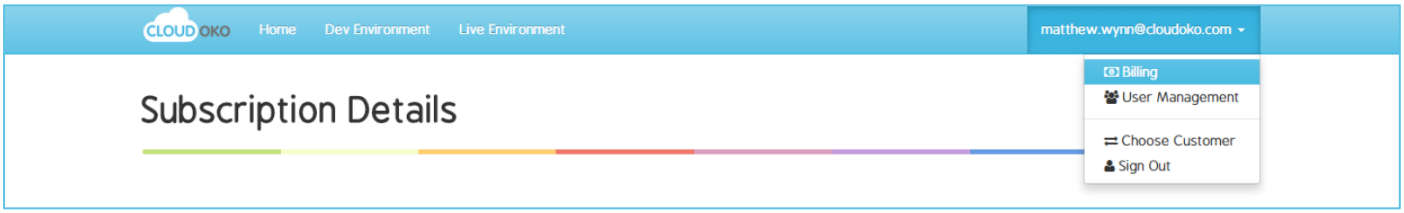


Figure 1 – Showing primary navigation in My Cloudoko

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.

Defining Dashboards

The central tenant of Cloudoko Hub is a Dashboard. These can be created for: -

- CRM desktops
- Web sites
- Intranet sites

Dashboard hosting

We offer two forms of dashboard hosting:

- **Standalone**: Where a dashboard is given a unique launch URL that can be called up in a browser. This is the typical approach we would use for CRM desktop integration.
- **Embedded**: Where a dashboard is integrated directly into your website pages by including simple CSS and JavaScript files in the page.

Securing access to dashboards by IP address

It is possible to customise to control the range of IP addresses that can view a dashboard URL. This ensures that you can only display internal information to your staff who use a CRM system for example.

A website dashboard would typically have this feature disabled as we expect that the site implements its own authentication.

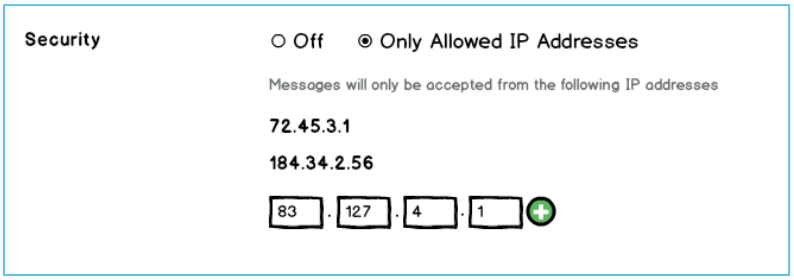


Figure 2 - Defining IP address restrictions on a dashboard

Securing access to dashboards with user authentication

Where authentication is required, the Cloudoko Identity module can be licenced for an additional fee. Please see the pricing document for more details.

Available Connectors

Each Connector that is licensed in your Cloudoko Hub subscription will contain one or more Plugins. Plugins can be dropped on to a dashboard to display the desired information.

We have created connectors for many popular back office systems in local government and are always open to requests to develop others. Licensing costs for each Connector are discussed in the pricing document.

Connector for Lagan Enterprise

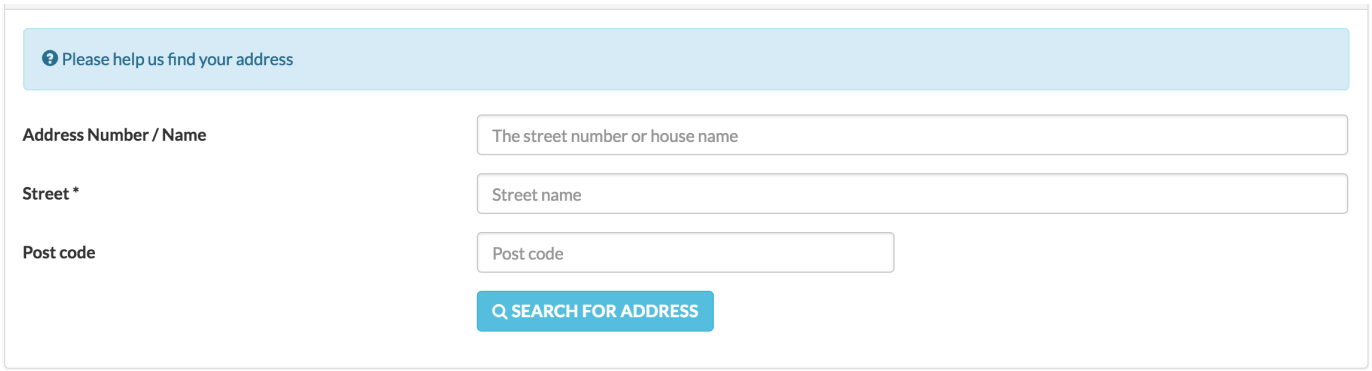
4 plugins are offered by this Connector. They can replace the out of the box views in the Lagan Agent Desktop if desired and offer a richer set of features than the standard application.

Coverage for the 4 out of the box “Lagan ODM objects” is provided

- Individual
- Organisation
- Property
- Street (Intersection for North American users)

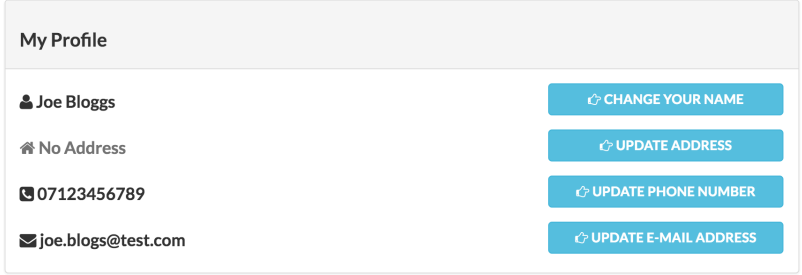
Search features

The example below shows a search plugin that retrieves Property records from the Lagan database.



Display features

The example below shows a plugin that displays Individual records from the Lagan database.



Action Buttons

Action buttons are links to your business processes (which can be delivered via our Cloudoko Forms service or any URL based resource). In the Connector for Lagan Enterprise, you could use the Action Buttons feature to call up your Single Customer Record processes when capturing changes to Individual records. For other customers we have developed these to push information around your organisation so that departmental siloes can be updated whenever a customer change is captured.

Enhanced Navigation Features

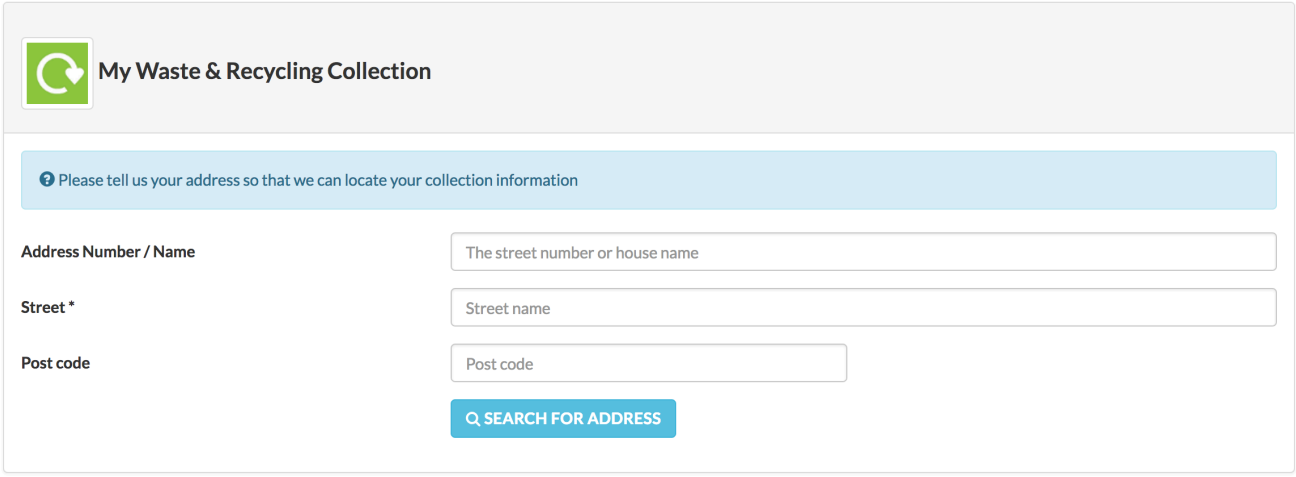
Should you decide to deploy this connector within a dashboard designed for your Lagan CRM agents, additional navigation features can be made available which facilitate greater integration with the Lagan Agent Desktop. This is discussed further in the section entitled "**Lagan CRM support**".

Connector for Yotta Mayrise

The purpose of this Connector is to facilitate integration to premises, collections and bins records in the Yotta Mayrise database. This allows you to provide a “lookup my bin collection day” style functionality on your website.

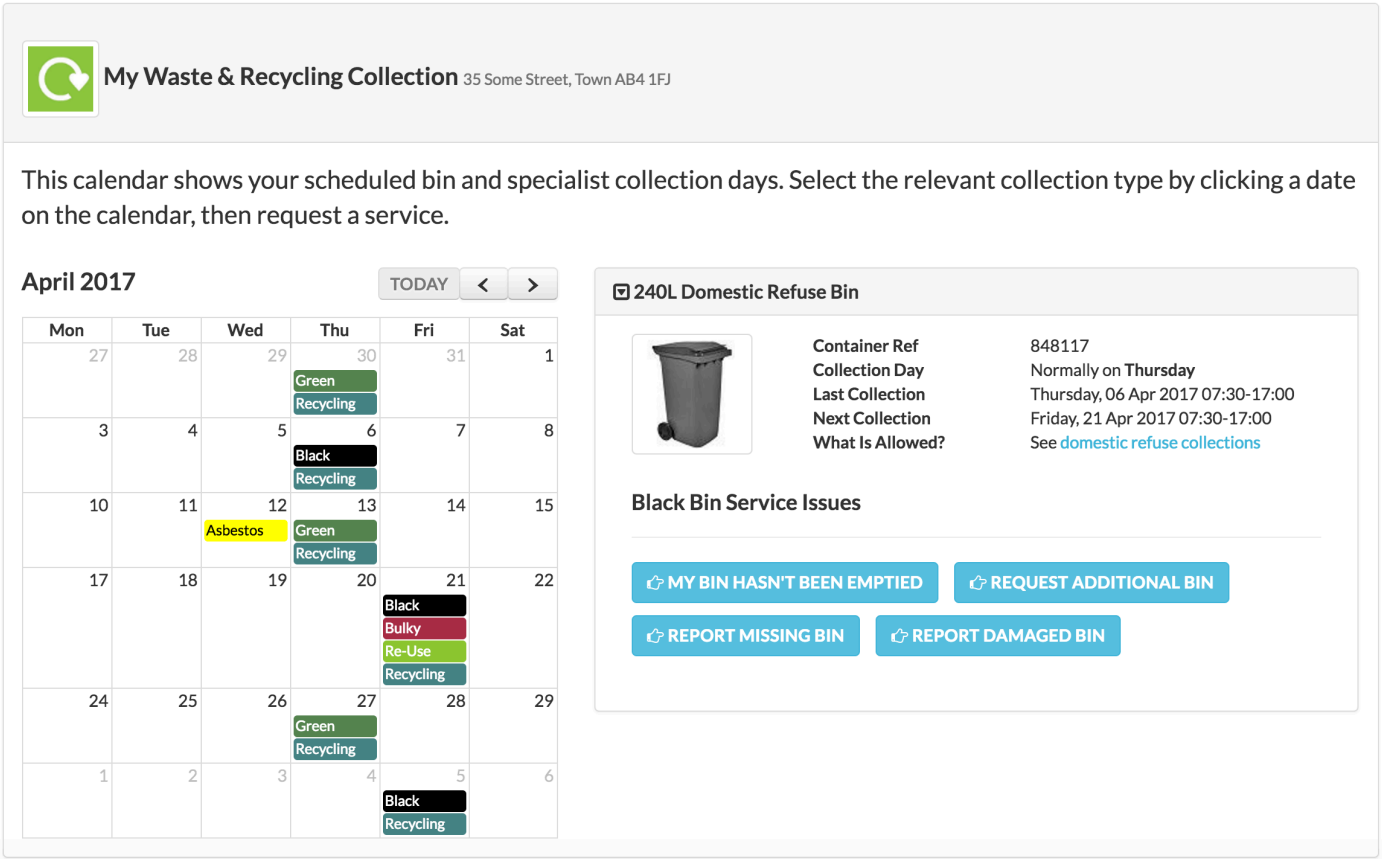
Search features

The example below shows a search plugin that retrieves premise records from the Mayrise database.



Display features

The calendar summarises the upcoming bin collection dates. Rules can be configured to control access to “missed collection” reporting according to your internal business rules.

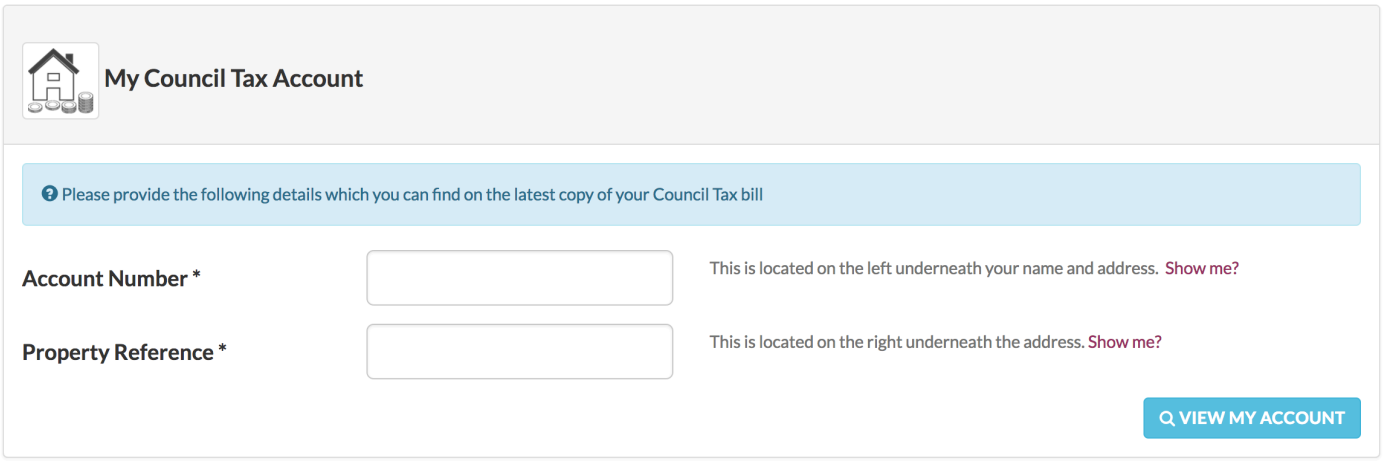


Connector for Northgate Revenues

The purpose of this Connector is to facilitate integration in to Council Tax and Business Rates (NDR) records held within the Northgate Revenues product.

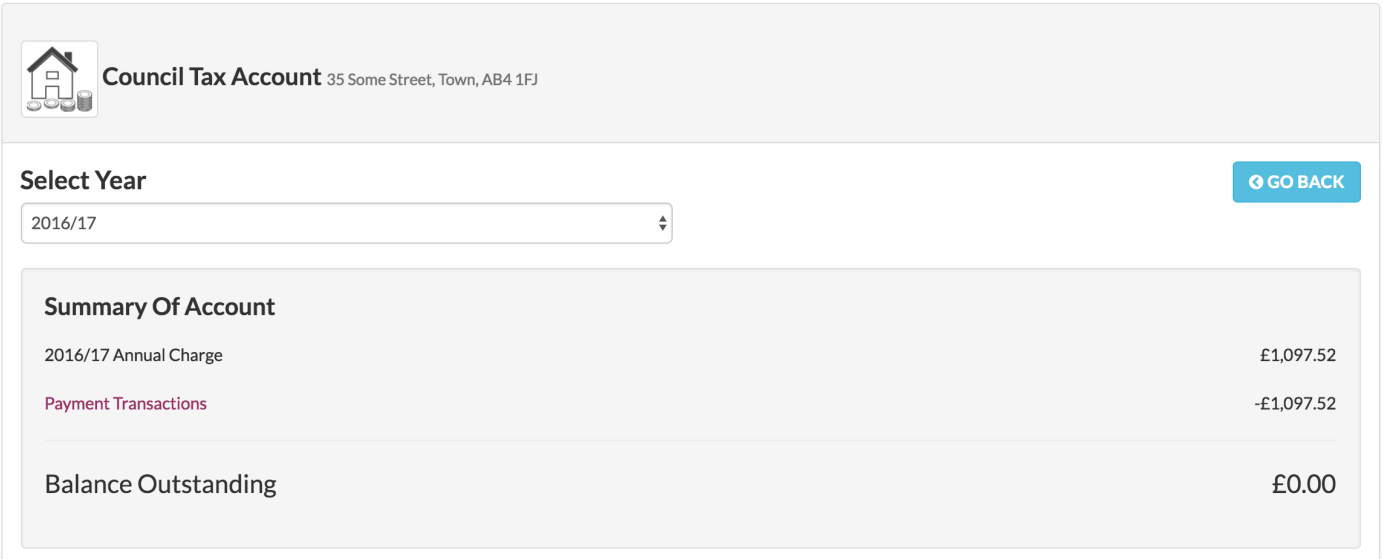
Search features

The example below shows a search plugin that retrieves Council Tax records from the Northgate Revenues database.



Display features

Accounts display a summary of the available billing years, and a breakdown of accounting within that year. All information is pulled directly from the Northgate Revenues API.



Full information about the account is retrieved to allow customers to understand how their balance has been calculated. **Action Buttons** can be used to call out to your business processes (which can be delivered via our Cloudoko Forms service or any URL based resource).

Account Information

Account Reference	100001089658
Account Start Date	28-Aug-2015
Parish	Greenland
Band	B
Property Reference	010006629637
Property Address	35 SOME STREET SOME TOWN AB4 1FJ

TELL US YOU HAVE MOVED

Online Account Actions

TELL US ABOUT

REQUEST A COPY OF YOUR BILL

SUBMIT INCOME & EXPENDITURE

SUBMIT AN APPEAL

DISPUTE A COMPLETION NOTICE

Payment Due Dates

The payments due show your latest instalment plan for the year and may not match your total balance outstanding. This can occur where you have arrears from a previous year and you are paying those under a separate arrangement with the Council; or you have had a new instalment plan set up in this year. If this applies to you and you are unsure about what you should pay and when, please contact us for further information.

Date Due	Method	Amount

CHANGE PAYMENT PLAN

Payment Transactions

Payments may take up to 7 days to show on your account depending on how you have made the payment. If a recent payment is not showing, please check again in a few days time before contacting us.

Date Paid	Method	Amount
07-Mar-2017	Direct Debit	£91.00
07-Feb-2017	Direct Debit	£91.00
07-Jan-2017	Direct Debit	£91.00
07-Dec-2016	Direct Debit	£91.00
07-Nov-2016	Direct Debit	£91.00
07-Oct-2016	Direct Debit	£91.00
07-Sep-2016	Direct Debit	£91.00
07-Aug-2016	Direct Debit	£91.00
01-Jul-2016	Direct Debit	£91.00
01-Jun-2016	Direct Debit	£91.00
01-May-2016	Direct Debit	£91.00
01-Apr-2016	Direct Debit	£96.52
Total Paid		**£1,097.52**

Connector for Northgate Benefits

A Connector to facilitate integration to Housing and Council Tax Benefit claims records is currently in production. Please visit our website for latest updates.

Connector for Northgate Housing

A Connector to facilitate integration to Housing Rent Accounts is currently in production. Please visit our website for latest updates.

Connector for Northgate Document Management (Images@Work)

A Connector to facilitate integration to Images@Work filing systems is currently in production. Please visit our website for latest updates.

Web customer experience

Cloudoko Hub can operate as a standalone web page, or it can be embedded amongst other content in your own web site for a truly integrated look and feel. Full hosting instructions are available to administrators through the My Cloudoko portal.

Look and feel customisation

We can style the Cloudoko Hub visual elements to match your corporate branding scheme. This will be carried out as part of the service installation.

CRM integration

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 and how best to integrate with it.

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

Cloudoko Hub can help you maximise the use of your CRM by allowing agents to retrieve data records from your key back office systems. This enables your contact centre agents on the telephone / email channel to deal with requests directly, and avoids the need to transfer customer enquiries to the back office.

Lagan CRM support

We have an out of the box integration for KANA / Lagan CRM customers. This is facilitated by the Connector **for Lagan Enterprise**.

Cloudoko Hub can be used inside the Lagan Agent Desktop application. The integration within is achieved by registering a Cloudoko Hub Dashboard as an “Intranet Integrator” component. The Cloudoko Hub dashboard can be used in “offline mode”, or called up during ScriptFlow at pertinent points of the conversation between agent and customer. In addition we employ a technique known as “Lagan Commands” which will allow the agent to navigate between linked records in the Hub Dashboard and see the “Brief Details” area of the Lagan Agent Desktop UI update to stay in sync with the record being viewed on the dashboard. This tight integration between the Cloudoko Hub dashboard and the Lagan Desktop make it feel as if the applications were designed together, and not as a “bolt on”.

Support for other CRM systems

The Cloudoko platform is a highly extensible architecture. We are always open to working with other solution providers.

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 Hub 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 Hub 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 back office databases (where applicable)
- Connect to your back office system 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.

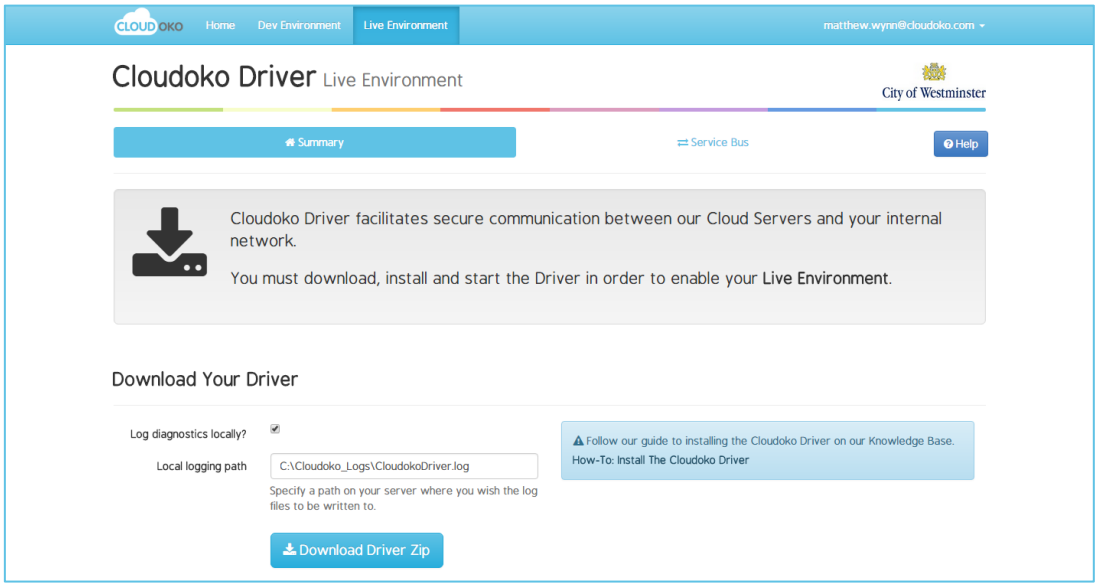


Figure 3 – Showing Cloudoko Driver software download page

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.

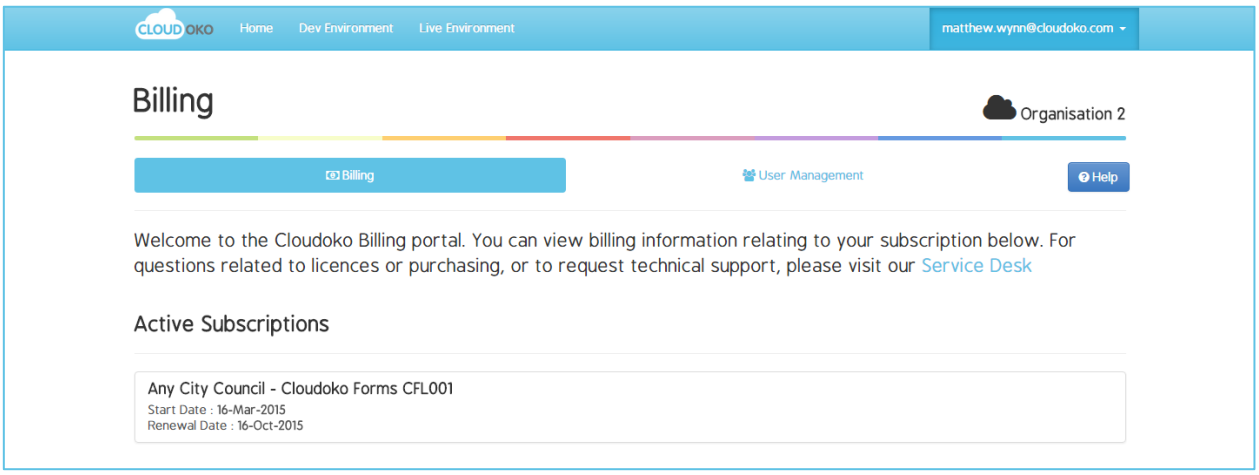


Figure 4 - Cloudoko subscription management

Off-boarding & cancellation process

You may cancel your Cloudoko Hub 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 Hub installations from our cloud servers.

Backup and disaster recovery

Cloudoko Hub is an API interfacing tool, as such we only stores "pointers" to your internal records in our database.

Other data is stored in our database and comprises the following:

- Configuration data for your dashboards.
- Configuration data that tells our service how to connect to your back office systems.

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.

Service levels

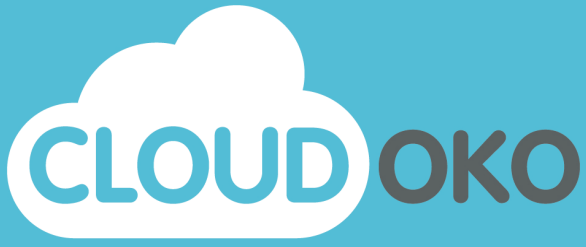
As per clause 9 of our subscription agreement we shall use commercially reasonable endeavours to make our service available 24 hours a day, 7 days a week.

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