



EYE-I SYSTEMS LTD

Service Definition Document

Lot 2b

Cleata – Workflow Automation Platform

G-Cloud 15



Service Definition Document

Lot 2b – Cloud Software - Cleata – Workflow Automation Platform

1. Service Overview

Cleata is a cloud-hosted workflow automation and integration platform designed to remove manual processes and operational workarounds around existing enterprise systems. It connects platforms through reusable, pre-built workflows, improving data flow, auditability and efficiency without replacing core applications.

Cleata is system-agnostic and operates alongside existing systems.

2. Service Functionality

Cleata enables organisations to automate repeatable operational processes using pre-built workflows provided through the platform.

Key capabilities include:

- deployment and operation of pre-configured workflows
- configuration of workflow parameters to meet local requirements
- orchestration of multi-step processes across connected systems
- secure integration using APIs, webhooks and file-based data exchange
- secure management of credentials for connected systems
- monitoring of workflow execution status, outcomes and errors

Users do not create or design workflows.

Workflow design, development and structural changes are managed by the supplier to ensure consistent governance, quality and reliability.



3. Service Interface

Cleata is accessed through a secure web-based portal that allows authorised users to view, configure and manage deployed pre-built workflows.

Users can:

- deploy available workflows
- start, stop and monitor workflow executions
- configure workflow parameters such as credentials, schedules, thresholds and routing options
- view execution history, errors and operational metrics

Role-based access controls ensure users only see and manage workflows relevant to their responsibilities.



4. Workflow Automation Scenarios

Scenario 1: Cross-System Automation



Description

Data or events originating in System A are processed by Cleata using a pre-built workflow and then passed to System B. Cleata applies validation, business rules and orchestration logic before updating the target system. This enables automated data transfer and reconciliation between systems without custom point-to-point integrations.

Typical use cases

- System integration to update finance or ERP platforms
- Synchronisation of key identifiers across multiple systems to ensure reference data and code set consistency
- Event driven updates and system notifications



Scenario 2: In-System Automation



Description

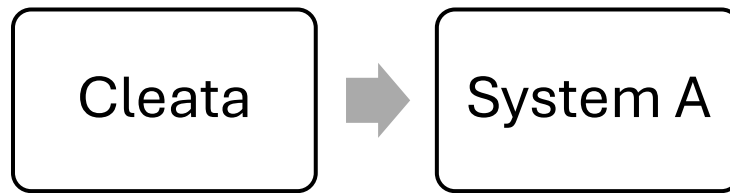
Cleata automates internal processes within a single system by responding to events, schedules or data changes and applying actions back into the same system. This removes manual intervention, spreadsheet-based processing and repetitive tasks, while the system remains the authoritative source of data.

Typical use cases

- Automated validations and status updates
- Scheduled data corrections or housekeeping
- Rule-based escalations and notifications



Scenario 3: Data capture and orchestration



Description

Cleata provides controlled data capture and orchestration capabilities that allow users to submit structured information through Cleata. The data is validated and processed by a pre-built workflow before being applied to System A. System A remains the system of record, with Cleata acting as the automation and control layer.

Typical use cases

- Submitting structured requests or updates into enterprise systems
- Validating data prior to applying changes to core platforms
- Replacing email or spreadsheet-based data collection processes

Governance and Control

Across all scenarios:

- Workflows are pre-built and managed by the supplier
- Authorised users configure workflow parameters within defined limits
- Connected systems remain systems of record
- Cleata does not replace core system functionality or user interfaces

Cleata acts as a secure automation and orchestration layer, improving efficiency, auditability and consistency while preserving existing enterprise architectures.



5. Deployment and Hosting Model

Cleata is delivered as a Software as a Service (SaaS) solution.

By default, the service is hosted on public cloud infrastructure provided by Amazon Web Services (AWS). Where required by the customer, the service can alternatively be deployed on equivalent managed public cloud platforms such as Microsoft Azure or Google Cloud Platform, subject to agreement.

- Each customer is provisioned a logically isolated tenant
- Infrastructure operation, patching and maintenance are managed by the supplier
- No local installation or client-side software is required

All deployments use equivalent security, resilience and compliance controls provided by the underlying cloud platform.

6. Onboarding and Offboarding

Onboarding

Onboarding includes:

- Tenant provisioning
- User access configuration
- Activation and configuration of relevant pre-built workflows

Guided remote setup, documentation and online training sessions are provided to support adoption.

Offboarding

At contract end:

- All automated workflows are halted
- Customers are provided with a secure link to download their data for an agreed period
- Credentials used to connect to third-party systems are removed
- Tenant data is securely deleted following the retention period



7. Customisation and Continuous Improvement

Cleata is customisable through pre-built workflow templates and configurable process options.

Authorised users can tailor workflow behaviour by configuring parameters such as thresholds, schedules, routing options, data mappings and approvals within the constraints of the deployed workflow. Workflow creation, logic design and structural changes are managed by the supplier.

The annual licence includes:

- Ongoing platform maintenance and enhancement
- Security updates and compliance improvements
- Access to new generally available workflows as they are released

Customer-specific or prioritised enhancements may be delivered separately under Lot 3.

8. Service Constraints and Fair Use

- Internet access is required
- Integration depends on supported connection methods (for example APIs or secure file exchange)
- Customers are responsible for holding appropriate licences for integrated third-party systems
- The service operates alongside, and does not replace, core transactional platforms

Use of the service, including the number of connected systems and processing volumes, is subject to fair and reasonable use. Where usage materially exceeds typical patterns and impacts platform performance or operating costs, the supplier may agree additional capacity or revised commercial terms with the customer.



9. Security and Data Protection

Security controls include:

- Encryption of data in transit using TLS 1.2 or above
- Encryption of data at rest using cloud-provider managed encryption
- Role-based access control and multi-factor authentication
- Secure storage of credentials used for system integrations

The customer remains the data controller for any personal data processed through the service.

10. Data Handling and Export

Cleata processes data in transit and stores only limited data required to operate workflows, including:

- workflow configuration parameters
- execution logs and operational metrics
- integration configuration metadata

Operational data and metrics can be exported via the service interface in open formats such as CSV and JSON, where applicable.

11. Monitoring, Metrics and Availability

The service provides real-time operational metrics, including:

- workflow run counts
- execution status and timestamps
- success and failure outcomes
- line-level processing results where applicable

Cleata is designed to be highly available using resilient public cloud infrastructure. Planned maintenance is notified in advance, and service incidents are communicated to nominated customer contacts.



12. Support

Support is provided during UK business hours (9am–5pm, Monday to Friday, excluding UK public holidays) via email and phone.

- non-urgent queries are normally responded to within one working day
 - urgent issues are responded to within one hour during support hours
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13. Exit and Data Access

Upon contract termination, customers are provided access to download their data for an agreed period. After this period, all customer data is securely deleted in accordance with data retention and sanitisation policies.