

G-Cloud 15

SERVICE DESCRIPTION

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G-Cloud 15 Service description

Why Jotform Enterprise?

Efficient government operations begin with best-in-class data collection. Streamline processes with secure digital forms, custom mobile apps, and automated workflows that improve collaboration and productivity with Jotform Enterprise. Replace paper processes and siloed systems with shared online workspaces and secure, role-based access.

While standard Jotform plans cater to individuals, Jotform Enterprise provides enhanced security, customization, collaboration, and user management tools.

Key features of Jotform Enterprise

Enhanced security

The platform supports 256-bit SSL encryption, PCI DSS compliance, and features for complying with GDPR, HIPAA, and other regulations. It also offers single sign-on (SSO) integrations and local data residency for better security and performance.

Customization

Users can white-label forms, apply branding elements, and create custom form URLs, ensuring a seamless and professional user experience.

Admin Console

This central dashboard allows administrators to manage users, teams, and data; monitor activity; and customize integrations, enhancing organizational control and collaboration.

Scalability

Jotform Enterprise supports unlimited users, forms, and submissions, enabling organizations to meet growing data demands without technical limitations.

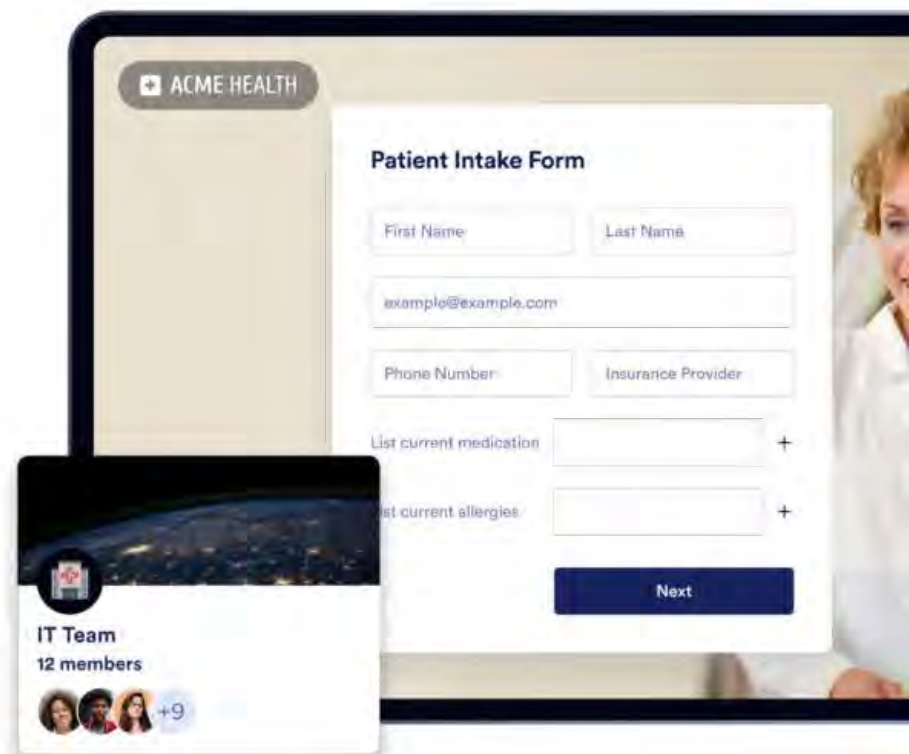
Support and professional services

Jotform Enterprise offers a dedicated support team, training resources, and professional services to ensure smooth implementation and adoption.

Governments can leverage Jotform Enterprise to improve efficiency, enhance collaboration, and comply with regulations.

Why Online Forms?

Online forms have revolutionized how organizations gather and manage data. Collecting data digitally — rather than via paper-based processes — means your organization can access that data and put it to work immediately, which leads to more tailored customer and constituent experiences and more informed decisions.



The image shows a tablet displaying a 'Patient Intake Form' for 'ACME HEALTH'. The form includes fields for 'First Name', 'Last Name', 'Email' (with 'example@example.com' entered), 'Phone Number', and 'Insurance Provider'. It also has expandable sections for 'List current medication' and 'List current allergies', each with a plus sign. A 'Next' button is at the bottom. In the foreground, there is a social media group card for 'IT Team' with '12 members' and a '+9' icon, featuring a cityscape background and member avatars.

Key benefits of online forms

Efficiency

Online forms drastically reduce the time it takes to collect and process data.

Cost reduction

Replacing paper forms not only saves on paper and printing costs but also reduces the amount of administrative labor it takes to collect and process information.

Improved accuracy

Digital forms help eliminate manual data entry errors, providing higher-quality information.

Scalability

By reducing the use of paper, online forms conserve valuable resources.

Adaptability

Online forms are versatile tools that can be used for a variety of purposes, from automating workflows to enhancing productivity.

Server Setup

Jotform Enterprise's server setup combines robust security, regulatory compliance, and ease of use. These features empower organizations to scale operations efficiently while protecting sensitive data and maintaining full control over their digital infrastructure.

Key aspects of server setup with Jotform Enterprise

Data migration

Jotform Enterprise streamlines migration from existing Jotform accounts (Bronze, Silver, or Gold plans). Organizations can schedule migrations during server creation or request assistance for additional data transfer. Certain settings, like encrypted forms and API endpoints, will require reconfiguration.

Local data residency

Enterprise users can host data in local cloud centers worldwide, ensuring compliance with data protection laws such as GDPR. This enhances security, reduces latency, and aligns with legal and operational requirements.

HIPAA and SOC 2 compliance features

Jotform Enterprise supports high-security environments and local data residency. These frameworks ensure adherence to standards for data security, availability, and confidentiality — vital for government agencies.

Single sign-on (SSO) integration

SSO centralizes user authentication, reducing the risks of password misuse and streamlining workflows. SSO can further enhance efficiency by auto-populating fields using stored user data.

White labeling

Organizations can customize forms and workflows with their branding, including logos, colors, and domains, delivering a seamless user experience.

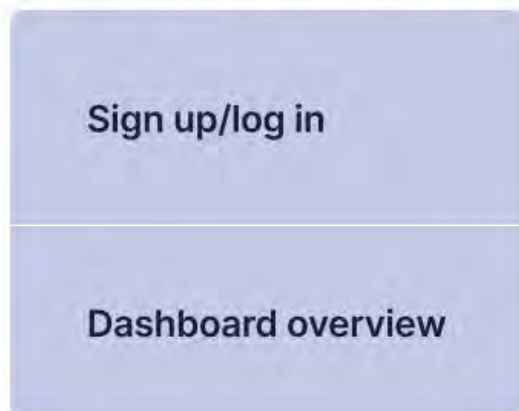
Admin Console

The Admin Console allows administrators to manage users, teams, permissions, and integrations from a central dashboard. Users can monitor system logs, view activity reports, and track mobile app usage, ensuring comprehensive oversight.

Creating Forms

Save on IT resources with a simple user interface that empowers anyone to create and customize online forms, add conditional logic, and align with their brand standards. Welcome to Jotform Enterprise's no-code, drag-and-drop form builder.

Getting started



New users can sign up via Google, Facebook, or email, while existing users can log in.

The "My Forms" dashboard is your central hub, listing forms with options for management and editing.

Form creation options



Start From Scratch

A blank slate is all you need



Use Template

Choose from 10,000+ premade forms



Import Form

Convert an existing form in seconds



Build a form entirely tailored to your needs using Jotform's intuitive, drag-and-drop Form Builder.

Choose from over 10,000 templates, categorized by type, industry, and profession. Templates can be customized to match specific requirements.

Easily convert existing web or PDF forms into dynamic online forms for further customization.

Types of forms

Classic forms

Display all questions on one page, ideal for detailed surveys or applications. Supports advanced widgets like video recording and social media connectivity.

Card forms

Present questions one at a time for a more engaging user experience. These are great for mobile devices and quick feedback forms.

Form customization

Branding options

Users can upload logos, choose brand colors, and design forms with custom fonts, backgrounds, and alignment options. White labeling ensures that forms reflect the organization's identity by removing Jotform branding.

Flexible form layouts

Users can choose between classic forms, which display all fields on one page, or card forms, which present one question at a time for a more engaging experience. Both layouts are fully customizable.

Advanced widgets

Over 250 widgets are available to enhance functionality, including widgets for e-signature collection, conditional logic, social media integration, and video recording. Admins can enable or disable widgets to align with organizational policies.

Templates and custom elements

Pre-designed templates save time, and admins can create reusable templates for team use. Form elements, such as dropdowns, text fields, and rating scales, can be easily added or modified.

Custom URLs and thank-you pages

Users can share forms via branded URLs and add personalized thank-you pages to provide respondents with more information.

Dynamic features

Conditional logic and prefill capabilities streamline the user experience by displaying relevant fields or auto-populating data based on previous inputs.

Designing forms

- Use the Form Designer to customize colors, fonts, and layouts.
- Choose from preloaded themes or create your own.
- Advanced customization options, such as injecting custom CSS, are available for classic forms.

Thank-you pages

The screenshot displays the Jotform Form Builder interface for a 'Contact Us Form'. The top navigation bar includes 'Jotform', 'Form Builder', and 'Contact Us Form' with a timestamp 'All changes saved at 2:30 PM'. Below this is an orange bar with 'BUILD', 'SETTINGS', and 'PUBLISH' tabs. The left sidebar contains various settings categories: FORM SETTINGS, AI FORM ASSISTANT (marked 'NEW'), EMAILS, CONDITIONS, THANK YOU PAGE (selected), INTEGRATIONS, WORKFLOWS, JOTFORM SIGN, and MOBILE NOTIFICATIONS. The main workspace shows the 'THANK YOU PAGE' configuration. It includes a green checkmark icon and the text 'THANK YOU PAGE' and 'Choose an Action After Submission:'. Two radio buttons are present: 'Show a Thank You Page after submission' (selected) and 'Redirect to an external link after submission'. Below these is a rich text editor toolbar with options like Bold, Italic, Text Color, Background Color, Link, Unlink, Table, and more. The editor area displays a large green checkmark icon inside a white envelope, followed by the text 'Thank You!' and 'Your submission has been received.' At the bottom right of the editor are 'Action Buttons' and 'Add Field' buttons.

- Customize a thank-you page to acknowledge form submissions and further engage respondents.
- Add action buttons like "Fill Again" or "Download PDF" for seamless follow-up.

Key features for first-time users

- Customize a thank-you page to acknowledge form submissions and further engage respondents.
- Add action buttons like "Fill Again" or "Download PDF" for seamless follow-up.

Emails

Automated emails allow for seamless communication between organizations, respondents, and other stakeholders. Use autoresponders to confirm form submissions and notifications to alert stakeholders to new submissions, enhancing productivity and engagement.

Types of emails

Autoresponders

Autoresponder emails are automatically sent to respondents when they submit a form. Organizations can use autoresponders to send acknowledgments and related follow-up materials.

Autoresponder emails include:

- Customizable subject lines, including dynamic insertion of form data
- Flexible content formatting with branding options
- The ability to include attachments like PDFs

Advanced options allow you to schedule emails, send updates about edited submissions, and hide empty form fields.

Notification emails

Notifications are directed to form owners, collaborators, or team members to alert them of new submissions.

- They support customizable subject lines, content, and recipient lists.
- Notifications can also include form submission data and file attachments.

Reminder emails

Reminder emails are sent to nudge recipients who haven't completed a form.

Features include:

- One-time reminders or scheduled reminders (daily, weekly, monthly)
- Customizable email content and design

Reminders are ideal for maintaining workflow continuity and ensuring data collection deadlines are met.

Distributing Forms

Jotform Enterprise offers a number of ways to distribute forms, so respondents can access them easily.

Sharing options

Quick Share

- Share form links directly via email, messaging apps, or social media platforms like Facebook, X, and LinkedIn.
- Generate QR codes to allow respondents to scan and complete forms on mobile devices.

Email invitations

- Send personalized email invitations with custom messages.
- Upload recipient lists as CSV files for bulk distribution.

Note: Recipients need a Jotform account to access private forms shared via email.

QR codes

- Create QR codes that link to your form in seconds. QR codes are ideal for posting in physical locations like retail stores, gyms, and events.
- Easily download codes for printing or embed them on websites.

Jotform Apps

- Create a Jotform App to house multiple forms, images, videos, and payment options.
- Share apps via links or QR codes, or embed them on websites.



Sharing forms internally

Use Quick Share with Company Access

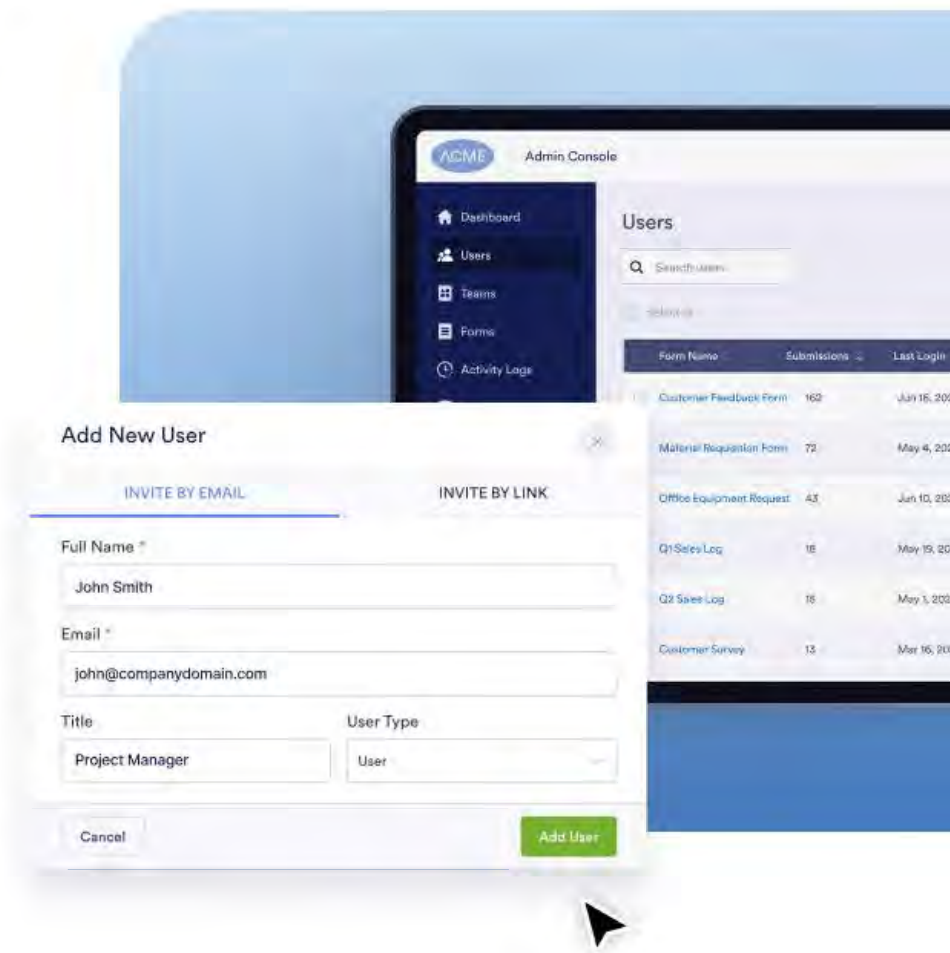
- Limit form access to users within your organization's email domain.
- Require logins with company credentials for added security.

Assign forms to individuals or teams

- Send forms via custom links or email.
- Use tracking features to monitor completion and set deadlines.

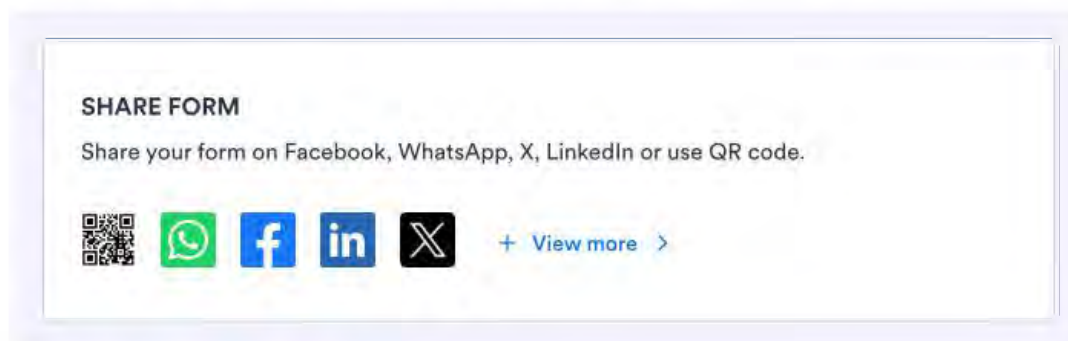
Share forms within team workspaces

- Move forms to a team workspace for collaboration.
- Admins can manage permissions and assign roles such as Team Admin, Data Viewer, or Creator.



Sharing forms externally

Publish forms using public, private, or restricted company access settings.



Use Quick Share options

- Copy links to share via email, social media, or QR codes.
- Embed forms into websites.

Assign forms with custom permissions

- Options include "Submit Only," "Submit & View," or "Submit & Edit Later."
- Protect forms with expiration dates and invitation-only access.

Custom apps with Jotform Apps

- Build no-code apps that combine forms, documents, and widgets.
- Publish apps for download on desktop and mobile devices.

Sharing options

Jotform Enterprise offers multiple methods for integrating forms into websites:

JavaScript embed code	Automatically adjusts form size to fit the website and updates when changes are made.
iFrame	Ensures compatibility by isolating the form code from webpage code.
Source code	Download and customize form code for advanced modifications.
Platform-specific embedding	Access prebuilt code for platforms like WordPress, Wix, Squarespace, and Shopify.
Lightbox and pop-up options	Display forms on your website through customizable overlays or movable windows.

Access and permissions

Jotform Enterprise offers multiple methods for integrating forms into websites:

Public forms	Open to anyone with the link.
Private forms	Open to anyone with the link.
Company access	Available only to users within a specified organization. Permissions include: Submit-only access Submit and view/edit access

Viewing Submissions

Use tools to organize and analyze data collected through Jotform forms.

Dashboard

The Admin Console dashboard displays key metrics like total submissions, forms, and views. Clicking on these metrics reveals charts showing engagement trends over time.

Custom date range

Users can select custom date ranges to analyze submission data for specific periods, generating tailored graphs.

Form insights

Administrators can view a comprehensive list of forms, including form names, submission counts, last submission dates, and form creators. A search bar allows quick navigation to specific forms.

Download options

Users can export form data and submissions in Excel or CSV formats for external analysis.

Granular filtering

The console allows you to filter by user activity, specific forms, and submissions. System Logs help track email and integration performance.

Action Buttons

Streamline workflows with single-click buttons to send emails, request data updates, or manage submissions.

Collaborative tools

Use tagging, color-coding, and commenting within submissions to enhance teamwork and streamline decision-making.

Jotform Inbox

Inbox is a streamlined space for viewing individual submissions in a messaging inbox. Features include

- Sorting and filtering submissions by fields like date or status
- Adding internal notes for team collaboration
- Direct reply options for quick follow-up

Jotform Tables

Tables is a powerful spreadsheet-like tool for managing and analyzing data. Form submissions populate automatically into Jotform Tables, eliminating manual data entry. Key capabilities include

- Sorting, filtering, and grouping data
- Adding custom columns to enrich submission details
- Creating shared workspaces for team collaboration

Viewing submission trends in the Admin Console

The Admin Console in Jotform Enterprise provides tools to monitor and analyze submission trends.

Dashboard insights	Displays key metrics like total submissions, views, and form engagement over customizable date ranges.
Data filtering	Allows filtering by user activity, specific forms, or submission types for granular analysis.
Export options	Enables data export in formats like Excel or CSV for external reporting and deeper analysis.
Activity logs	Tracks user actions, form updates, and system performance for better oversight.
Collaboration tools	Facilitates teamwork with tagging, commenting, and color-coded submissions.
Integrations	Connect data in your Jotform Enterprise instance with third-party tools like Google Sheets, Slack, or CRMs for seamless workflow automation.

Collaborative features

- The Admin Console in Jotform EnterpriseShare data views or reports with team members through links or embedded dashboards.
- Control permissions to maintain data security (e.g., view-only or edit access).se provides tools to monitor and analyze submission trends.

Advanced Features

Explore the advanced functionalities, integrations, and security features that elevate Jotform Enterprise's capabilities beyond basic data collection to improve productivity, streamline workflows, and enhance data security.

Sharing options

Widgets

Extend the capabilities of your forms with widgets like

- **Take Photo:** Allow users to upload photos directly.
- **Spreadsheet to Form:** Prefill forms using existing spreadsheet data.
- **Image Gallery and Social Media Plugins:** Make forms more interactive.

Third-party integrations

- Connect Jotform Enterprise with apps like Google Drive, Salesforce, Slack, and more.
- Automate data transfer to CRMs, cloud storage, or communication platforms.
- Simplify payment processing with integrations like PayPal and Stripe.

Jotform Workflows

- Create automated workflows for tasks like leave requests or order approvals.
- Customize conditional logic, set conditional integrations, and process payments.
- Track the progress of individual, group, or team approvals.

Jotform Sign

- Use Jotform's built-in e-signature solution to create, sign, and manage digital agreements.
- Reduce paperwork, shorten turnaround times, and track signatures in one place.

Conditional logic

Conditional logic dynamically adjusts forms based on user responses, improving efficiency and user experience.

- Show or hide specific questions based on a user's previous responses.
- Perform calculations, such as quiz scoring.
- Allow users to skip sections that are irrelevant to them, saving them time.
- Change the thank-you page according to a respondent's answers (e.g., by adding personalized PDFs or other resources).

Prefill options

Prefill saves respondents time by auto-populating forms with existing data. This feature can reduce manual data entry, improve data accuracy, and increase response rates.

- Internal prefill
 - Manual entry
 - Data from Jotform Tables or other forms
 - SSO-based prefill for seamless and secure internal form-sharing
- External prefill
 - Prefill data through integrations with CRMs (e.g., Salesforce, HubSpot).
 - Automatically map CRM fields to form fields for streamlined data collection and updates.

Documents and PDFs

Jotform Enterprise's document and PDF tools allow users to convert static PDFs into fillable online forms, accept e-signatures, and produce professional-looking documents from form submissions.



PDF Editor

Jotform Sign

Customizations

Sharing and integrations

- Convert static PDFs into fillable online forms with automatic field detection.
- Convert form responses into professional PDFs for use cases such as receipts, invoices, and applications.
- Apply branding elements like logos, terms, and conditions.
- Store generated PDFs securely in Jotform or send them to third-party cloud storage tools through integrations.
- Convert PDFs into e-signature documents. Features include audit trails, automatic reminders, and delegation options, streamlining the signing process.
- When you upload static PDF forms or other documents, Jotform Sign automatically detects signature fields
- Use the PDF Designer to tailor the look and feel of PDFs to your needs. Or select from available templates for specific industries and use cases.
- Options like date stamps for PDF submissions and password protection enhance organization and security.
- PDFs can be shared securely via email or links.
- Automatically attach documents to autoresponder emails or send them to cloud storage platforms with integrations.

Data security

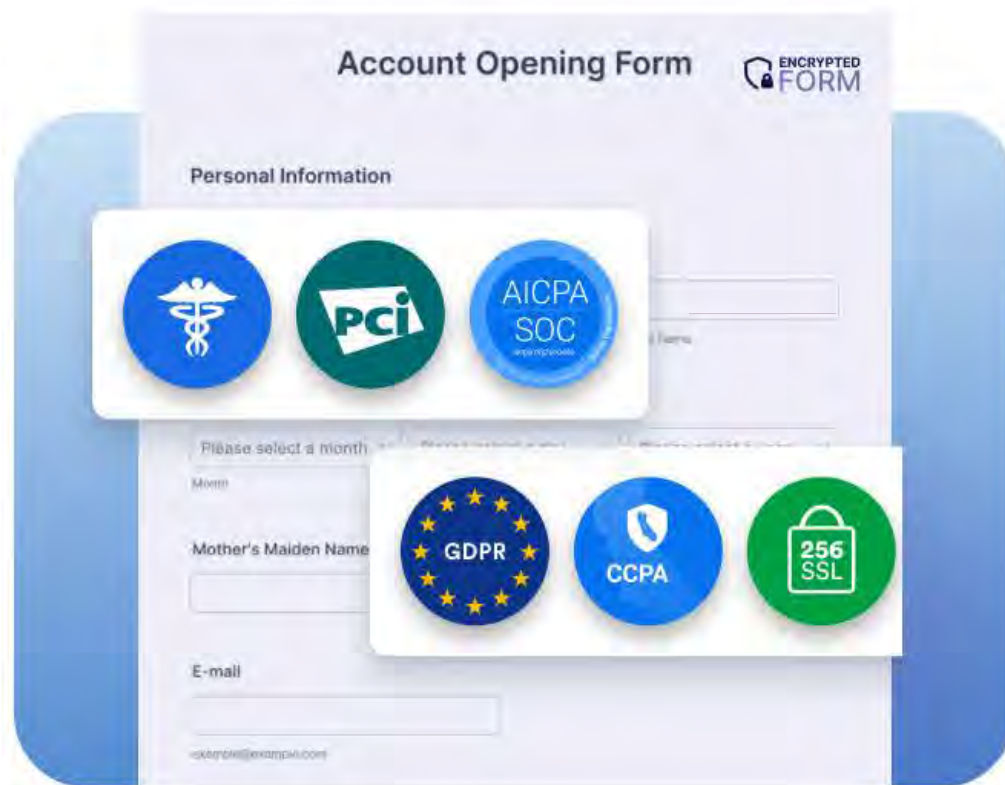
Protect sensitive data and comply with privacy regulations with Jotform Enterprise's robust security measures.

Understanding data security

Online forms are often used to handle sensitive information, such as personal identifiable information (PII), financial details, and medical records. Securing this data is crucial to maintaining user trust and meeting regulatory requirements.

Jotform Enterprise security features

Encryption	<ul style="list-style-type: none">• Forms can be encrypted to protect data in transit and at rest.• Only users with the private key can decrypt the submissions.
Data protection measures	<ul style="list-style-type: none">• SSL (Secure Sockets Layer) ensures data is transmitted securely. Jotform offers 256-bit SSL encryption, the industry standard for protecting sensitive information online.• Submissions can be stored securely in Jotform's servers or synced with third-party tools like Google Drive or Dropbox.
Access restrictions	<ul style="list-style-type: none">• Password-protected forms restrict unauthorized access.• Enable unique submissions by tracking IP addresses or cookies.
HIPAA solutions	<ul style="list-style-type: none">• Essential for healthcare organizations that handle Protected Health Information (PHI).• Form and data storage features are designed to meet HIPAA requirements with PHI-specific security options.
GDPR solutions	<ul style="list-style-type: none">• Jotform Enterprise allows users to enable GDPR compliance features like consent checkboxes.



Local data residency

- Regional cloud storage centers worldwide ensure compliance with local data protection laws, reducing latency, and enhancing security by keeping data closer to its users.

Single sign-on (SSO)

- Available for enterprise users to manage secure access across large teams.
- Allows only authorized personnel to view or edit sensitive forms.

Password-protected forms

- Maintain privacy and retain all post-form submission functionality.
- Ensure that only the people you want to fill out your forms will do so.

PCI DSS Level 1 certification

- Ensures secure payment data handling and compliance with the highest standards for protecting sensitive financial information.

SOC 2 attestation

- Provides rigorous data security, availability, confidentiality, and privacy protocols for safeguarding sensitive information.

The Jotform Enterprise Mobile App and Mobile Forms

Jotform Enterprise Mobile app extends the platform's functionality for users who work on the go, offering tools for seamless data collection, collaboration, and management directly from mobile devices.

Key features of the Jotform Enterprise Mobile app

Full platform access	<ul style="list-style-type: none">• Manage forms, submissions, approvals, and e-signatures from the app with functionality equivalent to the desktop version.
Offline forms	<ul style="list-style-type: none">• Enables data collection without internet access, automatically syncing submissions when a connection is restored.
Kiosk mode	<ul style="list-style-type: none">• Turns mobile devices into secure form-filling stations, ideal for events and in-person data collection. Includes features like auto-refresh after each submission.
E-signatures	<ul style="list-style-type: none">• Simplifies document signing on the go, reducing dependency on third-party e-signature apps.

Navigation and admin features

Admin Console	<ul style="list-style-type: none">• Offers mobile access to monitor forms, user activity, and app usage. Admins can invite users, track app installations, and adjust settings.
Custom invitations	<ul style="list-style-type: none">• Share app access via email or direct links for quick setup and deployment within teams.

Creating Workflows

Jotform Enterprise's Workflows streamline processes, reduce manual tasks, and improve collaboration across teams.

Workflow basics

- Workflows begin when a form response is submitted. Workflow users can approve, deny, or request further action, such as filling out additional forms.
- Conditional logic allows workflows to adapt dynamically based on responses (e.g., denying applications that are missing required documents).

Key elements

Approval Elements	<ul style="list-style-type: none">• Assign tasks to one or more approvers with options for reminders, escalations, and expiration dates.
Team Approvals	<ul style="list-style-type: none">• Approvals can be directed to teams, dynamically adjusting as team memberships change
Split Branches	<ul style="list-style-type: none">• Branch workflows for complex approvals and merge them after individual tasks are complete.
End Flow Element	<ul style="list-style-type: none">• Terminates workflows or completes specific branches.

Customization

- Send notifications, attach files, and create custom PDFs in Workflows.
- Workflow settings allow you to define permissions or requirements for approvers, set up conditional integrations, and customize notifications.

Sharing and integrations

- Share workflows via public links, QR codes, or embedded forms.
- Integrate workflows with third-party apps or internal systems using APIs.

Visualizing Data with Reports

Jotform Enterprise enables organizations to transform form submissions into actionable insights through a variety of reporting tools.

Report types

Visual reports	<ul style="list-style-type: none">• Assign tasks to one or more approvers with options for reminders, escalations, and expiration dates.
Digest Emails	<ul style="list-style-type: none">• Approvals can be directed to teams, dynamically adjusting as team memberships change
Excel reports	<ul style="list-style-type: none">• Branch workflows for complex approvals and merge them after individual tasks are complete.
HTML table listings	<ul style="list-style-type: none">• Online, shareable tables with sortable columns
Grid listings	<ul style="list-style-type: none">• Flexible online reports with advanced customization options like resizing and search
CSV reports	<ul style="list-style-type: none">• Text-based reports for easy data sharing
RSS listings	<ul style="list-style-type: none">• Automatically updated feeds for new submissions
Calendar listings	<ul style="list-style-type: none">• Submission data organized by date

Key features

Customization	<ul style="list-style-type: none">• Add logos, change colors, and include images for branding. Modify charts using a drag-and-drop interface.
Data sources	<ul style="list-style-type: none">• Generate reports from Jotform forms or third-party datasets (e.g., CSV, Excel).
Sharing and security	<ul style="list-style-type: none">• Branch workflows for complex approvals and merge them after individual tasks are complete.

Summary

Jotform Enterprise promotes efficiency, fosters collaboration, and reduces administrative burdens. By automating repetitive tasks and offering advanced document capabilities, organizations can focus on innovation and strategy while ensuring compliance and security.

Key tools and features

Enhanced Security and Compliance

- Safeguard sensitive data with single sign-on (SSO), two-factor authentication, local data residency, and solutions for StateRAMP, HIPAA, GDPR, CCPA, and SOC 2 compliance.
- Jotform is also PCI DSS Service Provider Level 1 certified.

Digital Transformation

- Ditch paper processes and easily host your government forms and applications online.
- Collect payments, gather e-signatures, and seamlessly digitize legacy forms with our drag-and-drop interface and smart PDF scanner.

Collaboration Tools and Administrative Controls

- Eliminate silos without compromising security with administrative permission settings,
- role-based access, SSO and domain-driven authorization, and user activity monitoring.

White Labeling for Custom Branding

- Deliver a user experience that builds trust and confidence. Display your agency's log
- branding, and more with custom URLs, icons, colors, and fonts.

Dedicated Support Team

- Get answers to questions and schedule real-time calls with a dedicated customer success team. Speed up platform adoption and user mastery with Boot Camp, or engage our Professional Services team to build your forms and workflow.

Unlimited Access

- Take advantage of unlimited forms, submissions, workflows, API calls, payment integrations, e-signatures, teams, and more.