Informed Solutions

Case Management and Workflow Service

G-Cloud 3 - Service Definition

V1.10.0
G-Cloud Overview

Informed Solutions’ Case Management and Workflow Service is available on the Government Procurement Service G-Cloud Framework under LOT 3 - Software as a Service (SaaS).

Service Overview:

The Informed Solutions Case Management and Workflow Service offers a rigorous and highly resilient end-to-end solution for the automation of workflow and case management business processes. Our Service:

1. lets your organisation quickly and intuitively configure an on-line Case Management and Workflow solution around the requirements of your business processes, that can be accessed via a standard web browser using standard security settings and without the need to plug-ins or other such client installed software.

2. is suitable for complex workflow scenarios, supporting the following features:
   - Fully configurable interface – Flexible interface options to design and implement forms for information capture, including the ability to have child forms and show or hide fields on the interface.
   - Information validation – Configurable rules to validate information at every step of the workflow
   - Context sensitive help – Context sensitive help to assist with information entry
   - Full user authentication – User, Organisation and Team permissions model including full support for distributed working across different organisations
   - Alerting – Email alert service when new cases are entered, or when action milestones are approaching
   - Attachments – Full support to attach supporting documents and materials to case work
   - Digital signatures – Full support for the preparation of digitally signed documents, suitable for use in consenting scenarios with regulatory services
   - Document generation – Generation of letters or other documents based on templates and information contained within the relevant case, suitable for scenarios where processing of a case results in a letter or other output to one or more parties.
   - Mapping – Mapping option for workflows having a geographic aspect so the location of cases can be mapped and validated against spatial datasets
   - Mobile devices – Full support for mobile devices

3. can be integrated with other business systems including document management systems, email, CRM and finance systems via a web services interface.

This service is available either on our innovative collaboration and analytics platforms, or on other platforms by agreement (other platforms include FOXopen, Kofax Total Agility, Singularity Process Platform, Firmstep Achieve Forms, Drupal and Microsoft Dynamics). The Case Management and Workflow Service is easy to get going and you only pay for the consultation & collaboration services you require, when you require them.
The service has a highly resilient delivery model (including load balanced delivery platforms and rapid burst scaling capabilities), and has been used to undertake a number of large scale public consultations by the UK Public Sector.

**Service Specific Features**

**Forms Features:**

- Displayed and completed online? – Yes, forms are accessed and completed using a Web browser.
- Part of an integrated and collaborative tool set? – Yes, the forms are fully integrated into a collaborative workflow system.
- May be edited/tested before publication? – Yes, forms can be developed iteratively and tested before publication.
- May be completed offline and submitted later? – Yes, facilities exist to complete certain operations offline for later submission.
- Standard elements may be created and re-used? – Yes, forms can be built in a modular way such that elements of a form can be reused.
- User may set security for individual forms? – Yes, the security model supports forms level validation and security.
- May be pre-populated with user local held data? – Yes, service support auto-population and default data entry.
- Real time record checking supported? – Yes, there is full support for validation of input as data is entered into the system.
- Can be part completed and saved by a user? – Yes, forms can be saved part completed, for later completion.
- Are formatted for local printing? – Yes, the service supports print friendly features.
- May be locally saved by a user? – Yes, forms can be locally saved by a user, including in formats such as PDF.
- End user self registration? – Yes, end users can change their own registration details and setup other users.

**Collaboration Features:**

- The service provides access to tools that support users engaged in common tasks to complete their goals? – Yes, there is a comprehensive set of tools within the service for users to contribute information (in any electronic form) and opinions, and share them with a community (including external communities on other social networking/media forums).
- The service allows the sharing of information between designated individuals or groups? – Yes, individuals and users can be assigned to groups.
- TNA compliant? – Yes, this service supports key requirements of TNA establishment.
- Artefact tagging? – Yes, this service supports the tagging of artefacts and information.
Social network integration? – Yes, this service is fully integrated with social networking services including Facebook and Twitter.

Mobile device support? – Yes, this service can be accessed from mobile devices.

Native Integrated Functions? – Yes, the service has native support for email and instant messaging.

Document / Record Life cycle Management? – Yes, content management facilities are available for uploaded content.

Business Process Management Support? – Yes, support is included for modelling and configuring information workflows.

Project Management Capabilities? – Yes, support is included for reporting and administration activities in support of a project management function.

Additional specific features that the service comprises can be viewed on the G-Cloud Catalogue. These features are detailed in a number of categories including:

- Geographic Search
- Search
- Data Visualisation
- Analytics
- Agile

For more details please contact David Chapman on 0161 942 2000 or david.chapman@informed.com.

**Information Assurance (Impact Level accreditation for information storage and processing)**

This service is available at IL0, IL1 and IL2 levels.

**Back-up/Restore and Disaster Recovery Provided**

Full back-up facilities are provided with the service, including hourly and daily options dependent on service data volumes. Backup frequency is by agreement with a client on initial service subscription, and can be varied thereafter by agreement.

**Details of On-Boarding and Off-Boarding (Processes and Scope)**

An on-boarding service is available which covers the following activities:

- Service Configuration – Comprises standard configuration of the service including set-up of authorised users, information repositories, configuration of business workflows, automated messaging interfaces (including configuration of the automated email service), and configuration of any specialist supporting data facilities (for example multi-media and spatial).
- Data take on – Comprises loading of a client’s data into the service, including loading such data as lists of authorised users, data required to provide the service (e.g. documents, images, multimedia content, spatial data etc) and supporting metadata. Data can be
accepted in a variety of popular electronic formats appropriate to the content, and data conversion and translation support is also available with the service.

- **Operational Readiness Assurance** – Comprises full testing of the service by the client with support from Informed Solutions to ensure suitability for launch.

An off-boarding service is available which covers the following activities:

- **Data Extraction** – Comprises export of all the client’s data collected by the service, including textual data, multimedia and spatial data where appropriate. Data can be provided to the client in a variety of popular formats appropriate to the content.
- **Data Removal** – Comprises removal of all data and information from the service following data extraction activities.

### Pricing (Including unit prices, applicable volume discounts, data extraction)

The £5,000 per month pricing listed on the CloudStore indicated in the catalogue is based on the following standard configuration of the service:

- Service Subscription Period: 3 months
- Hits per day: Up to 10,000
- Case Management and Workflow Materials Data Volume: Up to 500Gb
- Information Impact Level(s): IL0, IL1, IL2
- Service Availability: 99% Service Availability
- Data Storage Location: EU or USA Data Centre Options
- Service Help Desk Availability: Monday to Friday, 9:00am to 5:30pm (UK business days)

Price is based on:

- A monthly subscription charge.

Factors affecting the price:

- **Subscription Period**
- Scope of requested On and Off-Boarding Activities
- Number of Hits per Day
- Information Impact Level
- Service Data Volumes
- Service Help Desk Availability

We are happy to discuss any variations to our standard service pricing, based on your requirements. Any additional services requested will be based on the daily rates detailed in Informed Solutions’ SFIA Rate Card, which can be found on the CloudStore.

### Service Management Details

Service Management Details are as follows:
- Service Technical Boundaries – A Technical Reference Guide is available to support integration of this service with third party services within a Service Orientated Architecture, which includes details of web services interfaces and the messaging API.
- Services Availability to other suppliers – The service is available to other suppliers for use within integrated service offerings for the public sector.
- On and Off-Boarding Facilities – Full On and Off-Boarding facilities are available (see details of On and Off-Boarding above).
- Data Extraction and Removal – Full data extraction facilities are available in a range of popular formats.
- Data Process and Storage and Location – The service is offered with EU or US data processing and storage facilities.
- Safe Harboursing – The service is offered with safe harboursing if required by the client.
- Data Centre adherence to best practice – The service is available from data centres accredited to level (4) four by the uptime institute.
- Support Boundaries – First and Second Line Help Desk Services are available, including a Help Desk interface for other suppliers, where the service is incorporated or integrated within a third party service.
- Service Road Map – A Service Road Map is available to clients and perspective clients on request.
- Performance Attributes – The service aims to provide a 3 second response time to users, where 3 seconds is the longest a user should have to wait before receiving a response from the service.
- Backup and Disaster Recovery – Full backup and disaster recovery are included within the service.
- Documented Support Procedures – Fully documented support procedures are available to prospective clients on request.
- Real Time Management Information – Real time management information can be supplied as part of the service, typically covering service usage, data volumes and infrastructure performance.
- Real Time Reports – Real time reports are available from the service.
- Self Service Provisioning and De-provisioning – Tools are provided as part of On and Off-Boarding services to allow the client to upload and extract data from the service (see section On and Off-Boarding).
- Indicative Time for Provisioning and De-provisioning – Typically less than 1 month, although dependent on the complexity of the client data and service configuration requirements.
- Third Party Service Monitoring Tool Access – Service monitoring tools are available for access by third parties by agreement.
- Use of Service Desk by Third Parties – Third Parties may contact the Service Desk by agreement.
Service Constraints (Maintenance Windows, Level of Customisation Permitted, Road maps for functionality provision/deprecation)

The service is subject to the following constraints:

- **Maintenance Windows** – The Service is typically provided using separated virtualised infrastructure such that the service is continually available. Maintenance windows for configuration or other activities relating specifically to a client's use of the service (which can result in reduced availability levels) are normally agreed on a case by case basis with the client.

- **Levels of Permitted Customisation** – The standard service can be configured to set up users and teams, forms, information workflows, validation and information collaboration structures.

- **Functionality Changes (roadmaps and deprecation)** – This is a fully maintained service provided by Informed Solutions that is subject to on-going enhancement. A functionality road map is available on request (please see the Service Management Details section above).

Service Levels (Performance, Availability, Support Hours, Severity Definitions)

A full SLA is available for this service, which is configurable depending on the client’s requirements. The standard Service Level is as follows:

- **Performance** – The service aims to provide a 3 second response time to users.
- **Availability** – The service aims to achieve an availability of 99%.
- **Support Hours** – Monday to Friday, 9:00am to 5:30pm (UK business days).
- **Severity Levels** – The standard SLA categorises responses by Minor, Moderate and Major incidents, with corresponding response times.

Further details of SLA options and severity levels are available to perspective clients for the service on request.

Financial Recompense Model (where Service Levels not met)

Financial recompense models may be offered with the service, depending on the clients requirements. We are willing to discuss recompense models on client enquiry.

Training

We offer end to end user and administrator training for this service, delivered either on-line, or as skills transfer support to service administration staff. Full details of our training for this service are available to perspective clients on request.
Ordering and Invoicing Process

This service can be ordered through the G-Cloud Catalogue following the Government Procurement Service Ordering Procedures and we accept payment for the service via all common payment mechanisms.

We are very willing to discuss any potential use of the service, and if you would like to discuss using the service, or any further information, then please contact David Chapman on 0161 942 2000 or david.chapman@informed.com.

Termination Terms

Our termination terms are described fully in our standard Cloud Services Terms and Conditions.

Data Restoration / Service Migration

Data Restoration

We provide a full data back-up and restoration facility as a standard part of the service, in the event of any failure of the service during operation, and can offer a range of back-up and restore options.

Service Migration

To support you migrating on and off the service, we have a standard service On-Boarding and Off-Boarding facility, which is described more fully in Details of Service On-Boarding and Off-Boarding above.

Consumer Responsibilities

Our aim is to provide you with a stable and robust service which fully meets your organisational requirements. We will look to work closely and collaboratively with your internal teams to ensure that these aims are achieved. Your responsibilities are more fully explained in our Terms and Conditions, but by way of illustration include the following:

- You must be honest and genuine in any representation you make to us regarding your intended use of the service (for example your intended number of users and expectations of data volumes), and in providing us with any information for which we may reasonably ask you in order to monitor your use of the service. We will rely on these representations in agreeing the price for the service. You must also tell us if your use of the service changes significantly for any reason, and where you are aware that this change may be outside the parameters you have agreed with us for use of the service.

- You must pay for your on-going use of the service, and use the service at all times in keeping with the service terms and conditions agreed between us. Where we inform you that you are in breach of any of your obligations, you must remedy this breach as soon as possible, and you must not use the service for any unlawful or criminal purposes.
• You must assist us to configure the service for you; by helping us understand and meet your requirements and providing us with any data that you wish to be loaded in the service as part of On-boarding activities.

• You must also assist us with any acceptance testing activities that we may reasonably ask you to undertake, in order to show that the service is ready for use by you and meets your stated requirements.

• If you report an issue with the service to us, then we expect you to help us understand the issue and reproduce it, so that we can investigate it and where appropriate resolve it. We may also ask you to help us test any resolution, so that we are both satisfied that the issue has been resolved.

Technical Requirements (Service Dependencies and Detailed Technical Interfaces including Client Side Requirements)

This service is intended for use in a Web browser environment. Supported browsers include:

• Internet Explorer IE7, IE8, IE9
• Mozilla Firefox 4.0, 5.0
• Apple Safari 3.0
• Google Chrome 10, 11, 12
• Opera 9.x, 10.x, 11.x

Other browsers may be able to access the service. Access to the service requires an IP based connection to the Internet, using the HTTP and HTTPS protocols. For optimum responsiveness, a minimum bandwidth of 0.25 Mbs is desirable for use of the service. The service can be used over slower speed links, although performance may be impacted.

Trial Service Available?

A trial service is available by agreement. If you would like to trial this service, then please contact david.chapman@informed.com.