



# eForms

## Requirements Document

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## Document Tracking

### Revision History

Revision date	Previous revision date	Summary of Changes	By
0.1		First issue	Peter Dean
0.2	09/11/2015	Updated following feedback from Solution Architect	Peter Dean
1.0	10/11/2015	Signed off version 1	

### Document Locations

<b>Requirements Document</b>

<b>Business Case Document</b>

### Project Owners

This document has been distributed to:

Name	Title
Jonathan Mitchell	CAP Programme Manager

## Distribution

This document has been distributed to:

Name	Title	Date of Issue	Version
Kirsty Tobin	Head of Marketing and Communications	1/12/2015	1.0
Jonathan Mitchell	CAP Programme Manager	1/12/2015	1.0
Clive Davis	Solution Architect	1/12/2015	1.0
Jeremy Ranger-Green	Solution Architect	1/12/2015	1.0

## Requirements Sign-Off

The relevant Chief Officer requesting this project has reviewed the Requirement Specification and is satisfied that the required functionality for delivery is complete.

Name	Signature	Title	Date	Version
Kirsty Tobin	Email sign off	Head of Marketing and Communications	1/12/2015	1.0

## 1 Introduction

The Customer Access Programme has undertaken a review of all methods of contact into Council services be that via phone, post, email, face to face or web/online forms. The review of all contact with Council services had the following objectives:

- Increase customer satisfaction.
- Give a consistent level of service and customer care.
- Provide self-serve options for those who can.
- Provide alternatives to those who cannot self-serve.
- More up to date, quality and user friendly information online.
- Create a consistent infrastructure to support customer contact.

The outcome of this review was to identify the top ten services which need to be addressed to provide greater levels of self-service via digital channels to reduce the cost of service delivery.

In order to deliver the channel shift to digital channels the Council requires the core applications to be in place to allow development to take place. The applications which are required that are not currently within the Council's technology stack are a fully supported Content Management Package, an eForms application and an SMS messaging solution.

This document details the requirements for the eforms application.

## 2 Current Situation

Currently the online forms on Redbridge i have been developed in one of 3 ways:

- Forms Builder within Current CMS
- Using Gravity Forms Package
- Bespoke Development by ICT

Each of these solutions offers its own set of challenges for the business and there is a need to have a consolidated solution which will allow development of online forms which meet the requirements of the business where complex forms can be rapidly developed by ICT and the simple forms can be developed by business areas with little or no support.

Currently a business area which needs a new eForms will receive support from the Communications team to identify the correct solution. If a change is needed to an existing form which has been developed on the CMS forms builder work will be done to migrate the form to one of the alternative solutions as the CMS package does not meet the relevant security requirements for capturing personal data.

## 4 Requirement Specification

### Requirements

Ref	As A	I Want	So That	Importance (M/S/N)
1.0	Business User	To be able to develop a basic eForms without having to request ICT support	I can develop forms for my business unit quickly to improve my business	M
1.1	ICT User	To be able to develop complex eforms on behalf of the business	I can develop the forms which the business do not have the skills to deliver	M
1.2	Member of the communications team	The eforms developed to have a consistent look and feel regardless of who develops the form	The customer experience is consistent across all forms	M
1.3	Redbridge i Customer	To be able to simply complete forms which allow me to engage with the services which I need to	I can use the services which Redbridge provide with as little effort as possible	M
2.0	Form Designer	To be able to create a form using a variety of different Controls	The form can capture the information in the required format	M
2.1	Form Designer	To be able to use text input controls	Customers can enter variable text	M
2.1.1	Form Designer	To be able to control the number of characters which can be entered in each text control	The customer can only enter the information which is necessary	M
2.1.2	Form Designer	To be able to restrict the character types which can be entered in a text control	Customers can be required to input a specific type of information (e.g. numbers only for a phone number)	M
2.1.2	Form Designer	To be able to apply input masks to a text control	The customer is required to enter fields in a correct format (e.g. Post code)	M
2.2	Form Designer	To be able to add radio buttons to a form	The customer can be required to select one item from a range of choices	M
2.3	Form Designer	To be able to add check boxes to a form	The customer can chose to select one or many items from a range of choices	M
2.4	Form Designer	To be able to add a picklist control to a form	The customer can choose from a list of options	M

Ref	As A	I Want	So That	Importance (M/S/N)
2.4.1	Form Designer	To be able to manually create the options to be selected from within a pick list	I can define the records	M
2.4.2	Form Designer	To be able to pull the options for selection in a pick list from a third party application	I can use values already defined in another system	M
2.4.3	Form Designer	To be able to define the a different display value to that which is committed to the database	The correct value is applied to the database but the customer can see a value which is understandable to them	M
2.5	Form Designer	To be able to add a date picker to the form	A customer can choose a date in the correct format	M
2.6	Form Designer	To be able to add a file selector to a form	The customer can upload files which are relevant to the request being made	M
2.6.1	Form Designer	The customer to be able to upload files of all commonly used file types	The system is flexible to allow the customer to upload the file type which is appropriate	M
2.6.1.1	Form Designer	To be able to restrict the type of file which can be uploaded for each field	Restrictions on what file types a back office system can be incorporated	M
2.6.1.2	Form Designer	To be able to restrict the size of files which are uploaded	File limits for back office systems can be incorporated	M
2.7	Form Designer	To be able to add validation rules to fields	Data entry can be checked to ensure it meets the requirements	M
2.7.1	Form Designer	To be able to set fields as mandatory	A field must be completed before submission	M
2.7.2	Form Designer	To be able to validate field entry on a field by field basis	Data can be corrected as it is entered	M
2.7.3	Form Designer	To be able to validate field entry at page level	The validation can be made when the data is submitted	M
2.7.4	Form Designer	To be able to identify the error which has been made upon validation	The customer can make the necessary changes	M
2.7.4.0.1	Form Designer	To be able to clearly identify mandatory data which has not been entered	The customer knows they have to complete this	M

Ref	As A	I Want	So That	Importance (M/S/N)
2.7.4.0.2	Form Designer	To be able to clearly identify data which has been entered which does not meet the correct data format	The customer knows to correct the entry	M
2.7.4.1	Customer	To be able to correct the errors which have been identified	I can send the correct data	M
2.7.5	Form Designer	To be able to apply server side validation	Incorrect data which has not been picked up on client side validation is not entered into the database	S
2.7.5.1	Form Designer	To be able to message the client side of any errors	The customer has chance to correct any errors	S
2.7.6	Form Designer	To be able to create custom validation using data in third party systems	I can use the data we already hold to validate the customer's identity	S
3.0	Form Designer	To be able to build a form which spans multiple pages	The form can be structured so that it is easy to follow	M
3.1	Form Designer	To be able to set the breaks for a form	I can define the flow of the form	M
3.1.2	Form Designer	To be able to create a form in sections	I can structure the form in a way that makes sense to the customer	M
3.2	Form Designer	To be able to indicate the progress through the form that a customer has made	The customer can see how well they are proceeding	S
3.2.1	Form Designer	To be able to link the progress bar to the sections previously defined	The customer can see the progress against the required sections	S
3.3	Customer	To be able to go back to a previous section of the form I am completing	I can go back and change my entries	M
3.3.1	Customer	To be able go back to any point in the form without having to click through all the pages	I can easily access the section of the form I want to change	S
3.3.2	Customer	To not lose anything I have entered on the current page if I navigate off the page	I can move between pages without losing entries I have made	M
3.4	Customer	To be able to see a summary of all the information entered before I confirm submission	I can confirm the correct information has been entered	M

Ref	As A	I Want	So That	Importance (M/S/N)
3.4.1	Customer	To be able to go back and change information entered after reviewing the summary	I can correct any errors	M
4.0	Form Designer	To be able to create a form routes the customer according to the decisions entered	The form can ensure the customer gives the right information	M
4.1	Form Designer	To be able to set fields to display dependent on the responses to previous fields	Only the correct fields are displayed to a customer	M
4.2	Form Designer	To be able to set a field to be not applicable based on previous responses	The customer can be prevented from entering fields which are not relevant	M
4.2.1	Form Designer	To be able to hide fields based on the previous entry	A customer cannot enter fields that are not relevant	S
4.3	Form Designer	To be able to route the customer to the correct page within a form based on the entries made	A customer does not have to go to pages which are not relevant	M
4.4	Form Designer	To be able to alter the contents of pick lists based on previous entries	A customer is only given the options which are relevant to them	M
5.0	Form Designer	To be able to create forms which are solely text based	I can create a basic text form	M
5.1	Form Designer	To be able to create forms which includes images	A pictorial based form can be created	M
5.1.1	Form Designer	To be able to use images as selectable items in replacement of text options	A customer can choose an image as an option	M
6.0	Customer	To be able to save a form and come back to it later	I can complete a form in stages	M
7.0	Form Designer	To be able to create a form in its own standalone page	A large form can be displayed clearly	M
7.1	Form Designer	To be able to embed a smaller form into an existing page	Small forms can be included in existing workflows	M
8.0	Form Designer	To be able to use existing website design on forms	Forms can be kept within the same look and feel of the main website	M
8.1	Form Designer	The forms to inherit the CSS from the main site	The same style rules are applied.	M

Ref	As A	I Want	So That	Importance (M/S/N)
9.0	Customer	To be able to use my existing account for form based entries.	I don't have to create multiple accounts	M
9.1	Customer	To be able to access a record of forms from my account page	I can revisit the forms I have completed	M
9.2	Customer	To be able to see the progress of a form from my account page	I can see where the request is in the process	N
9.2.1	Customer	To receive notifications at critical points in the progress through the system	I can be kept informed	N
9.2.1.1	Customer	To be able to receive notifications by email	I can be kept informed in the method of my choosing	N
9.2.1.2	Customer	To be able to receive notifications by SMS	I can be kept informed in the method of my choosing	N
9.3	Customer	Forms to be pre-populated with the information which has previously entered against my account	I do not have to re-input data which I have previously provided	M
9.3.1	Form Designer	To be able to request data is pulled from business systems to pre-populate forms	Data held outside of the Redbridge i account can be pre-populated	M
9.4	Customer	To be able to look up my address when required	I can quickly find my address	M
9.4.1	Form Designer	To able to connect a form to the Council's gazetteer for address look up	The councils address database is used for accuracy	M
9.5	Customer	The form to provide help text to assist me in completing a form	I am able to provide the correct information	M
9.5.1	Customer	Help text to be available on all device types	I can complete the form regardless of what I am using	M
9.6	Form Designer	The forms created to be single sign on compatible	Existing sign on credentials can be used	M
10.0	Form Designer	To be able to introduce approval workflows into a form	A form can go through checks before being actioned	M
10.1	Form Designer	To be able to introduce multi stage workflows to a form	The form can go through a number of checks	M
10.2	Form Designer	To able to include the customer in workflows	If more information is required a customer can provide it	S

Ref	As A	I Want	So That	Importance (M/S/N)
10.3	Form Designer	To be able to configure a notification to be sent to user when workflow is allocated to them	The user is aware they need to complete an action	M
10.4	Form Designer	To be able to include third party systems in the workflow (e.g. payments)	To allow other transactions to link to the workflow	M
10.4.1	Form Designer	To be able to receive a message from a the third party system	The outcome of the stage of the workflow can be recorded	M
10.4.2	Form Designer	To be able to alter the response of a form depending on the response from the third party system	The form can flow according to the response	M
10.5	Council Officer	To be able to add additional information to be used by other officers within the workflow	The next person has all the information they need	M
10.5.1	Council Officer	The information I add to the form not to be shown back to the customer	Council information and decision making is ring fenced	M
10.6	Service Manager	To be able to reallocate tasks to another member of staff in the case of staff absence	Tasks do not get stuck due to unavailability of staff	M
10.6.1	Service Manager	To be able to allocate secondary users to tasks	There is not a single point of failure for a task	M
10.7	Council Officer	To be able to manage the cases created by eforms within the system	Cases can be tracked	M
10.8	Council Officer	Information contained within a form to be populated into the back office system once the form has been accepted	Data does not have to be rekeyed	M
11.0	Web Designer	To be able to create templates for forms	Forms can be developed in a standard way	M
11.1	Web Designer	To be able to create a library of controls which can be reused	The same format can be used for similar fields across the website	M
11.1.1	Web Designer	To be able to create standard blocks of content to be used on a form (e.g. Name and Address block)	Common data is always requested in the same way	M

Ref	As A	I Want	So That	Importance (M/S/N)
11.2	Web designer	Form designers to be able to pull content from the main website content library	Content can be reused in forms	M
12.0	IT Security Officer	Want the form to comply with all relevant data security standards	A customer can be sure that their data is secure	M
12.1	IT Security Officer	The forms be hosted on a secure server	Data is stored securely	M
13.0	Form Owner	To be able to report on activities within forms	I can see the value of my forms	M
13.0.1	Form Owner	To be able to create reports on any data held against the forms I own	I can perform full 360° reporting on my forms	M
13.1	Form Owner	To be able to connect my forms to Google Analytics	Usage data can be identified	M
14.0	Form Owner	All forms created to meet the Council's accessibility standards	Anyone can use the forms regardless of accessibility requirements	M

## 5 Non Functional Requirements

The application can be hosted on premise or cloud hosted although cloud hosting will improve the Council's reliance on the Redbridge infrastructure which will support the long term desire to improve the resilience of the Council's systems

The preference is for the system to be .net to support the current development resource within ICT however this is not a critical requirement as long as linkages can easily be developed to integrate with Redbridge i.

The database within the package must provide a database for storing data captured this database can be in any language however there is a strong preference for SQL

The eforms package must have an open API which allows integration with Council's back office systems.

The eform package to allow data to be extracted into common formats where an API is not available in a back office system.

The eForms system to provide integration with Boot Strap

The package must be able to develop forms with full responsive design.