

Specifications for the Department of
Public Works and Engineering –
Houston Permitting Center - Web Portal
and Content Management System
Exhibit VII

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Background and Statement of Need

The Houston Permitting Center (HPC) is seeking a vendor to provide solutions for a complete overhaul of its web presence. The purpose of this project is to implement a portal website and an underlying content management system (CMS) that are both maintainable and robust.

HPC Website

The existing HPC website was developed in conjunction with the opening of the HPC. Historically, each City of Houston (COH) department has maintained its own online presence, including regulatory information, permit and license requirements, applications, and records. The existing HPC website was assembled as a “gateway”, directing customers to the various COH departmental websites for details related to different permit and license categories.

The HPC website itself does have a consistent look-and-feel; however, there are no shared standards for vocabulary, navigation concept, breadth of content, and look-and-feel across the departmental websites. The current website also lacks the tools and core business functionality to guide business owners, contractors, developers, residents, and various other stakeholders through the process of determining instrument requirements related to their specific area of need, finding and gathering relevant information, making application, making payment, scheduling activities, and managing accounts and renewals. Customers are only able to perform these tasks in full by visiting the HPC during operating hours.

This project will consolidate and standardize content from multiple existing websites into an intuitive, customer-centric HPC Web Portal. Ultimately, the new portal will replicate the services available to walk in customers.

HPC Permitting Wizard

A key focal point of the overhaul is development of the HPC Permitting Wizard (the Wizard). Conceptually, the Wizard is a group of web tools powered by an interactive decision engine that guides customers through the various regulatory requirements associated with their specific needs—simplifying the process of identifying requirements, submitting applications, paying fees, scheduling activities, and managing accounts and renewals.

Customers would answer a series of questions, and then a list of required *instruments* and *related documents* is presented as a result of their unique answers. For example, a customer who wants to start a restaurant would answer a series of questions covering land use, sale of alcohol, hours of operation, parking and more.

Essentially, the Wizard should reduce permitting revenue leakage by making it easier for customers to understand requirements and subsequently achieve compliance. Additionally, departments will be able to direct their non-compliant customers to the Wizard where they access self-service information and services to quickly and easily resolve their non-compliance.

Content Management System

Since each department has been responsible for developing and maintaining their own web presence, multiple content management procedures and tools are being utilized to varying degrees. Content for the existing HPC website is managed by the Department of Public Works & Engineering (PWE) IT web services team.

PWE IT maintains several instances of content management systems (CMS). The external (i.e. public facing) CMS serves as a repository for department information, documents and links to other services provided by the department. It is currently running on the Drupal open source platform. Document management within this site is housed at <https://edocs.publicworks.houstontx.gov/>, and may be moved into the Drupal environment during the current fiscal year.

PWE's internal CMS (<http://pwecms.cityofhouston.net>) is only viewable within the City of Houston domain. It serves as a repository for internal documents and other employee information. The internal CMS is running on the Joomla open source platform.

The proposed improvements to the HPC website are sufficiently complex to require a professional content management system. Concurrent with HPC Web Portal and Wizard effort, the HPC seeks to deploy a CMS to facilitate efficient publishing and management of the web portal's content, which is owned by independent departmental representatives.

Purpose and Scope of Document

The new HPC Web Portal, Wizard and the CMS on which it is built (herein referred to as the *HPC Portal System*) are the subject of this specification. This document details the functional and performance requirements the HPC Portal System is expected to fulfill. It is a guideline from which the HPC Portal System will ultimately be designed and implemented. As such, it is not intended to stand alone as a final detailed specification for implementation. Proposers must verify and validate requirements throughout their review, clarification, and final proposal process. The final HPC Portal System design will evolve through multiple iterations that will commence only after the acceptance of the contents of this document, or its subsequent revisions, by the project stakeholders.

The scope of this document is limited to requirements that will impact the implementation of the HPC Portal System. Other requirements, such as those necessary to integrate other *line-of-business* systems with the HPC Portal System, are outside the scope of this document. However, Proposers must still consider in their design, data structures, system components, and applications the requirement for integration with other line-of-business systems as part of future development.

Organization of the Document

This rest of this specification document is organized into three (3) parts:

Part I provides a description of the conventions used throughout the document. It also provides an overview of the project, and its stakeholders, goals, constraints, scope of services, and key system features.

Part II describes requirements that are related to the HPC Portal System's behavior and its users. It constitutes the bulk of the document content and takes into account functional, performance, physical, and human factors that may impact the design, operation, or use of the system.

Part III addresses requirements that relate to the finished system and its delivery. These include hardware, warranty, installation, acceptance criteria, maintenance and upgrades, documentation, and training, additions/deletions.

PART I

Conventions

Definitions

The following terms are defined as they are used in the context of this document. Some terms have other meanings, including those in the broader context of Information Technology. Regardless, Proposers should keep in mind these particular definitions. On first appearance in each section of this document, these terms are italicized as a reminder of their intended meanings.

Account Profile – a collection of user-specific identifying information and other data such as contact information that is associated with a *user account*.

Actor – a formal nomenclature for describing entities that interact with the *HPC Portal system* in *use case* analysis and related system documentation; used in analysis to describe how they will interact with the system. An actor can be a person or a system, such as the *system* described herein, or external systems that interact with it.

Agent – a human *actor* whose role includes the responsibility and authority to interact directly with *Guests* and *Registered Guests*, and to receive and manage *online applications* submitted by them.

Application – refers collectively to all of the information that is submitted by a *Registered Guest* to request the issuance or renewal of an *instrument*, consisting of, at minimum, a completed application form and, if applicable, one or more attachments to it. In this specification are references to both “online” and “offline” applications. *Online applications* are those submitted electronically through the *HPC Portal System*. *Offline applications* are those submitted by other means including in-person, postal mail, fax, or email delivery.

Application Reference Number – a unique alphanumeric ID used to identify an *online application* after it has been submitted.

Article – a single item of content managed by the *content management system*, typically consisting primarily of text, and optionally including images, multi-media content, hyperlinks to other articles or media, etc.

Bookmark – a previously saved reference and hyperlink to a specific *instrument* that enables a *Registered User* to shortcut normal navigation and quickly return to an instrument of interest or relevance to their needs.

Business Unit – a general reference to a group whose operations are physically located at the Houston Permitting Center and/or whose online operations are included in the HPC Portal System.

CMS Administrator – a human *actor* whose role includes the responsibility and authority to manage the *content management system*, and whose interactions include *use cases* within the Management Portal boundary of the *HPC Portal System*.

Content Management System (CMS) – a computer program that enables publishing, editing and modifying content as well as maintenance from a central interface. Some, but not all, such systems also provide procedures to manage publishing workflow in a collaborative environment.

Content Manager – a human *actor* whose role includes the responsibility and authority to create, publish, and manage the content of the *HPC Portal System* for their *business unit(s)*, and whose interactions include *use cases* within the Management Portal boundary of the HPC Portal System.

Controlled Vocabulary – a restricted list of words or terms used for labeling, indexing or categorizing information. It is controlled because only terms from the list may be used for the subject area covered by the controlled vocabulary. It is also controlled because, if it used by more than one person, there is control over who adds terms to the list, when, and how. The list could grow, but only under defined policies. Controlled vocabularies are sometimes accompanied by a *thesaurus* of cross-references pointing from one or more “non-preferred terms” to the designated “preferred term”. Only if a controlled vocabulary is very small and easily browsed, such as on a single page, might such synonyms be excluded.

Department System – a system *actor* representing any *line-of-business* system supporting the critical activities of an individual department whose *instruments* are published and managed in the *HPC Portal System*. The HPC portal system will exchange data with one or more department systems.

E-Signature Processing System – an identified system *actor* representing the host system of a third-party electronic signature service provider. (see related term *Electronic Signature*).

Electronic Signature – an electronic sound, symbol, or process attached to or logically associated with a contract or other record and executed or adopted by a person with the intent to sign the record.

Guest – a human *actor* who has not created a *user account*, is therefore anonymous and whose interactions are consequently limited to *use cases* within the Public Portal boundary of the *HPC Portal System*. (see related term *Registered Guest*)

HPC Portal System – a term which collectively refers to the HPC Web Portal, HPC Permitting Wizard, and Content Management System; a system *actor* representing the *system* that is the subject of this specification; a centralized online resource and tool that will guide businesses and residents to a determination of the *instruments* they need, and enable them to apply and pay online, and obtain up-to-date information about those instruments and related Houston Permitting Center contacts. (see related term *Portal*)

Instrument – a generic term used throughout this specification to refer to any permit, license, registration, or fee that is published and managed in the *HPC Portal System*.

Line-of-Business System – one of the set of critical computer systems perceived as vital to the management of the activities of a business unit within the enterprise. (see related term *Department System*)

Modal – a type of user interface dialog box or window that requires a user to interact with it before returning to the normal flow of an operating program, thus preventing continuation of the main program workflow until the sub-flow of the modal object is complete or is cancelled.

Nearline – an intermediate type of data storage that represents a compromise between online storage (supporting frequent, very rapid access to data) and offline storage/archiving (used for backups or long-term storage, with infrequent access to data).

Payment Processing System – a system *actor* representing the host system of a third-party payment gateway that facilitates the transfer of payment information between a payment portal (such as the HPC Portal System) and the *payment processor* or acquiring bank.

Payment Processor – a company (often a third party) appointed by a merchant to process the authorization and settlement of credit card transactions for merchant acquiring banks.

Portal – a website that brings information together from diverse sources in a uniform way. It provides a way for enterprises to provide a consistent look and feel with access control and procedures for multiple applications and databases if necessary, which otherwise would have been different entities altogether. The *HPC Portal System* represents the collective whole of what have been termed in this specification as a Public Portal, a Private Portal, and a Management Portal. Although named separately, these distinctions are primarily intended to define system boundaries for the *use case model* defined herein.

Registered Guest – a human *actor* who has created a *user account*, is therefore not anonymous and whose interactions are consequently expanded to include *use cases* within both the Public Portal and Private Portal boundaries of the *HPC Portal System*. (see related term *Guest*)

Related Document – a generic reference to a supplementary document that is related to a particular *instrument* and made available for users to print or download for offline use. Hyperlinks to related documents, if any, are presented to users in the Instrument Home View. A related document may be in the form of HTML, PDF, or any other supported file format.

Resource – a generic term used throughout this specification to refer to any person, facility, etc. that can be scheduled (as referenced in the “Schedule an Event” *use case*).

Responsive Web Design – a web design approach aimed at crafting sites to provide an optimal viewing experience—easy reading and navigation with a minimum of resizing, panning, and scrolling—across a wide range of devices (from mobile phones to desktop computer monitors).

Source Document – a generic reference to the source of a printable or downloadable (PDF) version of a related document. The source document may be in the form of HTML or another supported file format.

System – a shortened reference to the *HPC Portal System* that is the subject of this specification; includes the whole of all computers, software, services, peripherals, interfaces, and processes that together satisfy the requirements of this specification.

Taxonomy – a formal classification or categorization system for information. Unlike a thesaurus, where a given term may or may not have broader or narrower terms, in a taxonomy all terms belong to a single, large hierarchy that encompasses all concepts of a certain class, category, or facet. Some systems employ content categorization tools to automate the placement of digital content for future retrieval based on the taxonomy. Other systems rely on users to manually categorize documents according to the classification scheme defined by the taxonomy.

Thesaurus – a structured kind of controlled vocabulary that provides information about each term and its relationships to other terms within the same thesaurus. In addition to clearly specifying which terms can be used as synonyms (called “used from”), a thesaurus also indicates which terms are more specific (narrower terms), which are broader, and which are related terms. Such thesauri are employed in the implementation of website search engines.

U.S. ESIGN Act – The Electronic Signatures in Global and National Commerce Act is a United States federal law enacted June 30, 2000 by the 106th Congress of the United States to facilitate the use of electronic records and signatures in interstate or foreign commerce by ensuring the validity and legal effect of contracts entered into electronically.

Use Case - a form of software engineering notation used for capturing functional requirements of systems. Each use case provides one or more scenarios that convey how the system should interact with the users called ‘actors’ to achieve a specific goal or function.

Use Case Model – a model of how different types of users interact with the *system* to solve a problem. As such, it describes the goals of the users, the interactions between the users and the system, and the required behavior of the system in satisfying the goals. A use case model consists of a number of model elements. The most important model elements are: *use cases*, *actors* and the relationships between them. For the benefit of reviewers of this specification, the use case model concept and related notation are fully explained in the section of this document titled “[The Use Case Model](#)”.

User Account – an established relationship between a user and a computer, network, or information service that allows a user to authenticate to system services and be granted authorization to access them. User accounts are assigned a unique *User ID* and a password.

User ID – a unique alphanumeric identifier used to identify a *user account*.

Wizard – a type of user interface that presents a user with a sequence of (usually modal) dialog boxes that lead the user through a series of well-defined steps. Tasks that are complex, infrequently performed, or unfamiliar may be easier to perform using a wizard. In contrast, an expert system guides a user through a series of (usually yes/no) questions to solve a problem.

Wizard Scenario – the in-process but incomplete data set provided by a user by interacting with the Wizard.

Acronyms

The following are acronyms that are used in the body of this document:

ARA – Administration & Regulatory Affairs

ARN – Application Reference Number

CMS – Content Management System

COH – City of Houston

CSS – Cascading Style Sheet

HAS – Houston Airport System

HFD – Houston Fire Department

HHS – Health & Human Services

HPC – Houston Permitting Center

HPD – Houston Police Department

HTML – Hyper Text Markup Language

MYR – Mayor's Office of Special Projects

PD – Planning & Development

PR – Parks & Recreation

PWE – Public Works & Engineering

SWD – Solid Waste Department

SKOS – Simple Knowledge Organization System

UML – Unified Modeling Language

WYSIWYG – What You See Is What You Get

Project Overview

Overall Goals

The HPC is seeking a vendor to provide a solution that meets or exceeds system, functional and technical requirements and criteria for this proposal, with the goals to:

- Design and implement a system with a 99.99% rate of availability
- Design and implement a scalable, flexible, secure system with emphasis placed on ease of management and maintenance
- Design and implement a web portal that consolidates all *instrument* information into an easy to navigate interface
- Standardize the organization and presentation of instrument information using *controlled vocabulary, thesaurus, and taxonomy*¹
- Develop clear, concise guidelines and instructions for instrument applicants
- Reduce instrument processing time
- Reduce instrument process errors
- Capture revenue currently lost due to non-compliance with existing instrument requirements
- Improve customer service

The solution will utilize industry best practices for user experience/design including a mobile first design philosophy (mobile application services), responsive web design, eCommerce, social media integration,

¹ These terms are used throughout this specification to exemplify a potential solution. Proposers may utilize other best practices in information management and knowledge organization in their responses

and analytics. The proposed solution should include options to leverage existing, upgrade and/or utilize new software/hardware.

Scope of Services

The selected Proposer will provide professional services, including:

- Configuration
- Installation
- Consolidation
- Integration
- Implementation
- Quality Assurance
- Quality control
- Development of testing criteria including use case based test cases
- Execution of unit, system and acceptance testing
- Development of training materials and delivery of training
- Development and publishing of online site analytics and system performance reports
- Security design and configuration
- System administration
- Warranty, extended maintenance and support for development, test, and production environments in the local data center (located at 4200 Leeland, Houston, Texas 77023) and the remote disaster recovery site (located in Bryan, Texas).

Key Features

The *HPC Portal System* shall exhibit the following key features, the details of which are described elsewhere in this specification:

- The HPC Portal System will be implemented using a *content management system* to facilitate the creation, publishing, and management of content.
- The HPC Portal System will provide a Public Portal where *Guests* can perform the following activities:
 - Discover and view publicly accessible content using methods including keyword search, browsing content organized in a taxonomic structure, or by using a wizard to discover content
 - Engage in live online chats with *Agents*
 - Download & print *applications* and other *related documents*
- The HPC Portal System will provide a Private Portal where *Registered Guests* can perform the following activities:
 - Submit and manage online applications with related attachments and, when applicable, sign applications and pay associated fees online
 - Bookmark *instruments* of interest for later use
 - Save *wizard scenarios* for later use
 - Manage *account profile* information and related details
 - Schedule *resources* such as inspectors, appointments, facilities, etc. online

Project Constraints

The project must be completed within twelve (12) calendar months following receipt of notice to proceed and purchase order issue by the City of Houston.

The project must be managed in a phase delivery approach intended to accomplish the following goals:

- **Phase 1:** The HPC Web Portal and consolidated content from COH departmental websites will be developed and deployed in development, test, and production environments locally, and also in the disaster recovery site environment within six (6) calendar months following receipt of notice to proceed and purchase order issue by the City.
 - Content will be discoverable using the keyword search and taxonomical browse methods.
 - Live chat functionality will also be developed and deployed in development, test and production environments locally during this phase.
- **Phase 2:** The balance of system functionality will be developed and deployed in development, test, and production environments locally, and also in the disaster recovery site environment within the next six (6) calendar months immediately following completion of the deployment of the Phase 1 deliverables defined above.
 - Features completed in Phase 2 will include but are not limited to the Wizard, dynamic online application forms, e-signatures, online application submission, and online payment.
 - Also included may be the integration of the HPC Portal System with one or more *department systems*, as may be required and determined at the time of scoping the phase.

With very limited exceptions, the entire project must be completed by external resources (i.e. the selected Proposer's resources), relying on COH personnel only as stakeholders, subject matter experts, and reviewers during the development, testing, and production stages of each phase. The exceptions are limited to participation that may necessarily be required of COH IT personnel who manage the software, servers and networks on which the resulting system is ultimately deployed.

Project Stakeholders

The primary stakeholder is the Houston Permitting Center Executive Director, who is ultimately responsible for the success of the project.

Department	Contact(s)
Houston Permitting Center Executive Director	Mark McAvoy

Secondary stakeholders are COH departments whose *instruments* will be published and supported by the *HPC Portal System*, and other departments whose participation is essential to understanding the work. The full list of these stakeholder groups and the specific individuals representing them are:

Department	Contact(s)
Public Works and Engineering (PWE) - Building Code Enforcement - Office of the City Engineer	Mark McAvoy Tim Lincoln
Administration & Regulatory Affairs (ARA) - Commercial Permitting & Enforcement - Parking Management	Kathryn Bruning Maria Irshad

Department	Contact(s)
- BARC	Greg Damianoff
Houston Airport System (HAS)	Steve Weeks
Houston Fire Department (HFD)	Cynthia Vargas Richard Galvin
Health & Human Services (HHS)	Rene Beckham
Houston Police Department (HPD)	J'Marcus Adams David Sauer
Mayor's Office of Special Projects (MYR)	Ricardo E. Magdaleno
Planning & Development (PD)	Jennifer Ostlind
Public Works & Engineering (PWE)	Mark McAvoy Rajiv Arya Richard Smith Bruce Lambright
Solid Waste Department (SWD)	Chastity Ringo Wealthia White
Houston Permitting Center (HPC)	Katrina Hassett Eric Vryn Soledad Saenz Marcela Orozco
Public Works & Engineering (PWE), IT <ul style="list-style-type: none"> - Web Development & CMS - Application Development - Infrastructure Management - Special Projects 	Robert Primera Brian Thronton Justin Ewald Shanti Kalluir

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PART II

The Use Case Model

Explanation

The use case model included in this specification, documented using standardized notation of the Unified Modeling Language (UML), is a model of how different types of users interact with the *HPC Portal System* to solve a problem. As such, it describes the goals of the users, the interactions between the users and the system, and the required behavior of the system in satisfying these goals.

A use case model consists of a number of model elements. The most important model elements are: Use Cases, Actors and the relationships between them.

A use case diagram is used to graphically depict the model to simplify communications. Much of the use case model is in fact textual, with the text captured in the [use case specifications](#) that are associated with each use case model element. These specifications describe the flow of events of the use case.

The use case model serves as a unifying thread throughout system development. It is used as the primary specification of the functional requirements for the system, as the basis for analysis and design, as an input to iteration planning, as the basis of defining test cases, and as the basis for user documentation.

Basic Model Elements

The use case model presented herein contains the following model elements:

Actor – a role that a person or external system plays when interacting with the HPC Portal System. Properties include the actor's name and brief description.

Use Case – describes the interactions between one or more actors and the HPC Portal System in order to provide an observable result of value for the initiating actor. Properties include the use case name and use case specification, which is provided separately from the use case diagram in this specification as it contains more detail than can be presented in the diagram.

Associations – are used to describe the relationships between actors and the use cases they participate in. A relationship is indicated by a solid line between an actor and a use case. The relationship is navigable, and a simple arrow on one end or the other indicates the direction of navigability. No arrow at all indicates a relationship with bi-directional navigation.

System Boundary – is a model element that represents the boundary of a system of interest. System boundaries are represented as rectangular boxes surrounding associated actors and use cases.

Generalization – defines a relationship between actors to support the re-use of common properties and allow for simplification of use case diagrams while encouraging consistent representation of actor properties. A generalization relationship is indicated by a solid line connecting two actors. An arrow on one end indicates the direction of the relationship. All properties of the actor to which the arrow points are inherited by the actor from which the arrow originates. (Note: Although the solid line notation style for association and generalization relationships appears to be similar in the model, an association is distinct

from a generalization in that an association defines a relationship between an actor and a use case, whereas a generalization defines a relationship between two actors.)

Dependencies – A number of dependency types between use cases are defined in UML. The use case model in this specification employs two dependency types in particular. They are the <<extend>> and <<include>> relationships, both indicated by a dotted line connecting two use cases.

- The <<extend>> relationship is used to include **optional** behavior from one use case in another.
- The <<include>> relationship is used to include common behavior from an included use case into a base use case in order to support re-use of common behavior.

The latter is the most widely used dependency and is useful for:

- Factoring out behavior from the base use case that is not necessary for the understanding of the primary purpose of the use case to simplify communications.
- Factoring out behavior that two or more use cases have in common to maximize re-use, simplify maintenance and ensure consistency.

HPC Portal Actors

The following actors, including both internal and external actors the HPC Portal System must support, have been identified:

- Agent
- CMS Administrator (*There will be at least one CMS Administrator.*)
- Content Manager (*There will be multiple Content Managers.*)
- Department System
- E-Signature Processing System
- Guest (*There will be multiple Guests.*)
- HPC Portal System
- Payment Processing System (*There will be only one Payment Processing System.*)
- Registered Guest (*There will be multiple Registered Guests.*)

HPC Portal Use Cases

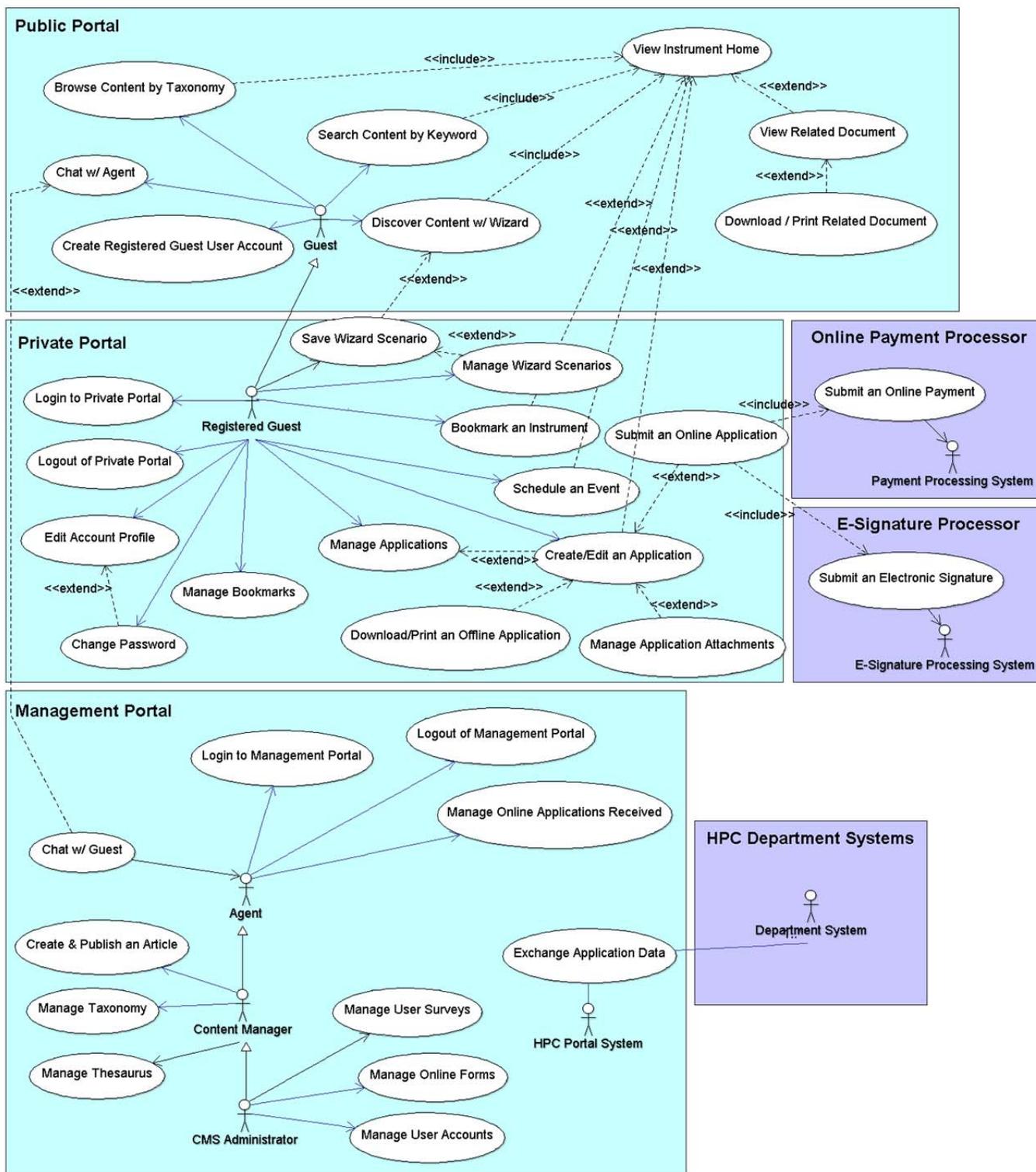
The following use cases that the HPC Portal System must support have been identified. A full specification of each use case can be found in [APPENDIX B - HPC Use Case Specifications](#) which is attached to this document, and incorporated herein by reference.

- [UC1](#) - Bookmark an Instrument
- [UC2](#) - Browse Content by Taxonomy
- [UC3](#) - Chat with Agent
- [UC4](#) - Chat with Guest
- [UC5](#) - Create & Publish an Article
- [UC6](#) - Create Registered Guest User Account
- [UC7](#) - Discover Content with Wizard
- [UC8](#) - Download / Print Related Document
- [UC9](#) - Exchange Application Data
- [UC10](#) - Login to Management Portal
- [UC11](#) - Login to Private Portal
- [UC12](#) - Logout of Management Portal
- [UC13](#) - Logout of Private Portal

[UC14](#) - Edit Account Profile
[UC15](#) - Manage Applications
[UC16](#) - Manage Application Attachments
[UC17](#) - Manage Bookmarks
[UC18](#) - Manage Online Applications Received
[UC19](#) - Manage Online Forms
[UC20](#) - Manage Taxonomy & Thesaurus
[UC21](#) - Manage User Accounts
[UC22](#) - Manage User Surveys
[UC23](#) - Schedule an Event
[UC24](#) - Search Content by Keyword
[UC25](#) - Submit an Electronic Signature
[UC26](#) - Submit an Online Application
[UC27](#) - Submit an Online Payment
[UC28](#) - View Instrument Home
[UC29](#) - Save Wizard Scenario
[UC30](#) - Change Password
[UC31](#) – Create / Edit an Application
[UC32](#) – Download / Print an Offline Application
[UC33](#) - View Related Document
[UC34](#) - Manage Wizard Scenarios
[UC35](#) - Maintain Wizard

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HPC Use Case Diagram



HPC Portal Supplemental Requirements

Consolidation of Existing Sites

The selected Proposer must identify, collect, consolidate, and publish reusable content from the existing websites currently in use by COH departments and the HPC. Existing websites from which content may be collected and re-published include (but are not limited to) the following:

www.houstonpermittingcenter.org
www.houstontx.gov/parking/
www.houstontx.gov/barc/
www.licensepet.com/houston
www.houstontx.gov/health/Food/index.html
houstontx.gov/fire/permits
www.houstonpolice.org
www.houstontx.gov/specialevents/
www.houstonplanning.org
www.houstontx.gov/parks/permits.html
apm.activecommunities.com/houstonparks/Home
www.houstontx.gov/parks/greenspace.html
www.houstonpermittingcenter.org/building-code-enforcement.html
www.houstonpermittingcenter.org/code-enforcement/inspections.html
www.houstonpermittingcenter.org/code-enforcement/sign-administration-and-permits.html
www.houstonpermittingcenter.org/code-enforcement/plan-review.html
www.houstonpermittingcenter.org/code-enforcement/permits-section.html
www.publicworks.houstontx.gov
www.publicworks.houstontx.gov/pds/index.html
www.publicworks.houstontx.gov/pds/cityengineer.html
www.publicworks.houstontx.gov/notices/floodplain.html
<https://edocs.publicworks.houstontx.gov/>
www.houstontx.gov/planning/
houstontx.gov/solidwaste/
www.houstontx.gov/solidwaste/commercial-dumpster-permits
www.codegreenhouston.org/
www.hpcservices.org/
www.houstontx.gov/ara/regaffairs/commercialpermitting/
www.houstontx.gov/ara/regaffairs/transportation/
www.houstonburglaralarmpermits.org

Refactoring & Reuse of Existing Content

Reuse of existing content will require the refactoring of it to reflect both the information architecture and visual design requirements described herein. When required, the selected Proposer shall perform such services as may be necessary to refactor and reuse the existing content.

Authoring & Creation of New Content

The information architecture described herein may require content that either does not already exist, or is not currently in a form that is suitable for use in the new design. When required content does not exist, the selected Proposer shall work with department subject matter experts to author and publish new content.

Information Architecture

Site Map

A proposed graphical site map depicting the high level organization of the HPC Web Portal is located in [APPENDIX A – SITE MAP](#), and is included herein by reference.

Controlled Vocabulary, Taxonomy, and Thesaurus

A proposed controlled vocabulary for the HPC Portal System exists in the W3C Simple Knowledge Organization System (SKOS) format. The W3C SKOS standard defines a portable, flexible controlled vocabulary format. The vocabulary consists of data to support both the taxonomy and thesaurus requirements of the project, and is comprised of 1,142 terms.

Once fully vetted by the project's stakeholders, the 'preferred terms' of the proposed vocabulary will be refined based on their feedback and then formally adopted as the controlled vocabulary for the HPC Portal System. Related and 'non-preferred' terms, essentially the thesaurus, will continue to evolve as new information emerges that suggests requirements for additional related and non-preferred terms.

The proposed controlled vocabulary of HPC Instruments is published online at:
<http://pwedev.houstontx.gov/hpcdev/tematres/instruments/thesauruswebpublisher/>

Standard Content Types

The HPC Web Portal information architecture defines the following content items that are employed extensively throughout the site:

Instrument Home – a structure that aggregates other content types so information and actions related to an instrument of interest can be grouped together in a single location. The Instrument Home provides easy access to the following standard content types:

Instrument Overview – presents an overview of information about a specific instrument, comprised of the following information in an logically organized and easy-to-interpret format:

- Instrument Name
- Summary Description of the Instrument
- Quick Facts Summary, including:
 - Instrument Type
 - Period of Validity
 - Whether Inspection is Required
 - Whether Renewal is Required
 - Summary of Fees, including:
 - Original Cost
 - Administrative Fee
 - Late Fee
 - Renewal Cost
- Description of the 'normal' application, review, approval, and issuance processes.
- Summary of any variations and/or exceptions from the 'normal' processes described above, if any.
- Summary of Inspection Requirements, if any.
- Reference to Statutory Authority

[\[Click to view example page.\]](#)

Instrument FAQs – a list of Frequently Asked Questions related to a specific instrument.

[\[Click to view example page.\]](#)

Application for New/Renewal Instrument – includes instructions for how to apply for and renew a specific instrument. May include instructions for in-person, mail, fax, and online application and renewal processes. Which of the preceding are included depends on the specific instrument and what options are supported by HPC. When an instrument is eligible for online application and renewal, the application and/or renewal forms will be presented here also.

[\[Click to view example page.\]](#)

Scheduling Options – includes an explanation of the supported methods of scheduling inspections or other events related to the instrument. If online scheduling is supported for a particular instrument, this page is where that service is made available to the user.

[\[Click to view example page.\]](#)

Contact Information – presents contact information and instructions for communicating with individuals or departments who can assist in matters related to the instrument. Will include all contact methods that are supported by HPC for the instrument, which may include online chat, telephone, in-person, mail, email, and an online contact form. When online chat and/or an online contact form are supported for a particular instrument, this page is where those services are made available to the user.

[\[Click to view example page.\]](#)

Related Documents – presents a list of hyperlinks to related documents such as downloadable/printable forms, affidavits, or other information that may be required as part of the application/renewal process, or which may be otherwise useful to the user. They may include links to other web pages either internal to or external to the HPC Portal, downloadable documents or forms, video, or any other supported media type as may be necessary.

[\[Click to view example page.\]](#)

Branding & Visual Design Requirements

PWE's Style Guide describes the common web styles prescribed for all City of Houston web sites, plus additional web styles that are unique to PWE (whose IT group manages the HPC website). It describes the onscreen elements such as headers, logos, standard color palette and standard typography for COH branding. It also presents guidelines for page layout and graphic elements. In addition, HPC Identity Standards define the color standards, typography, and size and placement of the HPC logo. Both the Style Guide and Identity Standards can be found in APPENDIX D – Additional Resources.

Compatibility Requirements

Responsive Web Design

The Public Portal and Private Portal (the externally facing websites) shall be implemented using *responsive web design* features that dynamically adapt page content, optimizing it for common mobile devices, and desktop display sizes.

At minimum, the Public Portal and Private Portal pages must be optimized for the following display widths:

- iPhone / Android – 320px wide

- Small Tablets – 640px wide
- iPad / Tablet – 768px wide
- Desktop Computer – greater than 960px wide

Browser Support

The Public Portal and Private Portal (the externally facing websites) shall be implemented in a manner that supports the following browser versions:

Internet Explorer	Chrome	Firefox	Safari	Opera
6+	Current – 1 version			

“Current - 1 version” denotes that the implementation shall support the current stable version of the browser and the major version that preceded it. For example, if the current version of a browser is 24.x, the implementation must support the 24.x and 23.x versions.

Human Factor Requirements

Accessibility

COH websites are frequented by a diverse group of people from around the globe. Some users have visual or motor skill impairments and utilize assistive technologies such as screen readers and text-only browsers; others view our pages using outmoded technologies and slow connection speeds. It is important that website creators be cognizant of these limitations and strive to make their websites accessible to the greatest number of people. As such, the HPC Portal website shall be implemented in a manner that is compliant with [Section 508](#) of the Rehabilitation Act of 1973.

More information on web accessibility and Section 508 compliance is available at:

- W3C Accessibility Checkpoints: <http://www.w3.org/TR/WAI-WEBCONTENT/full-checklist.html>
- Web Content Accessibility Guidelines: <http://www.w3.org/TR/WCAG20/>
- World Wide Web Consortium (WC3) Web Accessibility Initiative: <http://www.w3.org/WAI/>
- A List Apart: Accessibility Topics: <http://www.alistapart.com/topics/topic/accessibility/>
- Web Standards Project: <http://www.webstandards.org/>

User Interface & Content Language Support

Both the application user interfaces and the content pages of the Public Portal and Private Portal must be implemented in the following three (3) required languages:

- United States English (IETF en-US)
- Latin American Spanish (IETF es-419)
- Vietnamese (IETF vi)

Online Help Resources

The customer service applications in the Public Portal and Private Portal (the externally facing websites) shall offer the following online help resources:

- Context Sensitive Help Pages – Written online help resources that are unique to each page of the website. The content shall:
 - Explain the purpose and overall goal of each page
 - Describe the standard features of the page in detail

- Provide links to related help resources, if any.
- “Using the HPC Portal” Video Tutorials – A collection of tutorial videos that visually introduce the [Key Features](#) of the Public and Private Portals and demonstrate how to use them.
- Online frequently asked questions (FAQ)

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Content Management System Supplemental Requirements

CMS Platform

PWE IT resources have a preference for employing the Drupal Content Management System, provided that it will support the requirements presented herein. It should be noted, however, that this is merely a preference and is not a requirement. All solutions will be considered, and alternate solutions are encouraged.

Taxonomy & Thesaurus Management

Whether the capability is integral to the chosen CMS, or provided by external tools, the overall system must provide support for maintenance and management of the Taxonomy & Thesaurus (or other recommended technique). Although changes to the controlled vocabulary will be strictly managed, the ability for an authorized *Content Manager* to make those changes and have them take effect in the HPC Portal System is key to the ongoing success of the System.

Media Types & File Formats

The following media types and file formats are expected to form the bulk of the content that will be managed in the HPC Portal Content Management System.

- HTML5 – HyperText Markup Language
 - Internet media type: text/html
 - Filename Extension: .html
- XHTML5 – Extensible HyperText Markup Language
 - Internet Media Type: application/xml, application/xhtml+xml
 - Filename Extension: .xhtml, .html
- CSS – Cascading Style Sheets
 - Internet Media Type: text/css
 - Filename Extension: .css
- PDF – Portable Document Format
 - Internet Media Type: application/pdf
 - Filename Extension: .pdf
- GIF – Graphics Interchange Format
 - Internet Media Type: image/gif
 - Filename Extension: .gif
- JPEG – Joint Photographic Experts Group
 - Internet Media Type: image/jpeg
 - Filename Extension: .jpg, .jpeg
- PNG – Portable Network Graphic
 - Internet Media Type: image/png
 - Filename Extension: .png
- TIFF – Tagged Image File Format
 - Internet Media Type: image/tiff
 - Filename Extension: .tif, .tiff
- Embedded Video
 - Embedded video content of various formats, hosted by third parties such as YouTube, Vimeo, and possibly others.

E-Commerce Requirements

The HPC Portal System must generate an invoice transaction for every *instrument* that requires payment upon initial application or renewal.

- System must calculate a total invoice amount, including original cost and administrative or other fees, if any.
- System must facilitate online payment of invoices through integration with one or more third-party *payment processors*.
- System must support the encoding of profit center data in transactions to ensure that payments received are properly directed upon settlement of payment transactions.
- System must provide reports to *Registered Guest* users of past invoice/payment transactions made.
- System must comply with Payment Card Industry (PCI) standards and requirements

The HPC Portal System shall generate renewal notices upon the approach of expiration of a renewable instrument.

- The number of days in advance of instrument expiration that renewal notice is sent shall be configurable by CMS Administrator.
- Renewal notice shall be sent as email to Registered Guest's email address on file.
- Renewal notice shall contain hyperlink to the renewal process on the Private Portal.

Performance Requirements

Availability

PWE IT standards prescribe the following requirements for system and application availability:

- System availability shall be no less than 99.99% on a monthly basis.
- Application availability shall be no less than 99.75% on a monthly basis.

Reliability

Up time is critical; the goal is 24 hours per day, every day. The minimum requirement per server is 200 days continuous operation of the hardware, OS and loaded applications.

All servers which are running either enterprise or department critical services are to be setup with fail-over ability.

Performance

Performance is a critical aspect of web services. Therefore the selected Proposer will establish benchmarks and include tools to monitor the following areas of System performance:

- Transacting Monitoring – How are my online transactions performing?
- Website Performance – How are my websites performing?
- Server Availability – Are the web servers up?
- Systems and Server Monitoring – How are the internal systems (CPU load, disk utilization, processes, etc.) performing?
- SLA Performance Monitoring – Are the agreed upon service levels being met?
- Web Load Testing – How do the websites respond under various loads? Where is the limit?

Scalability

The proposed solution must be scalable, allowing growth up to 50% before additional hardware is needed.

Users, Traffic & Transactions

Analytics data from the existing HPC Website provides a glimpse into what can be expected in terms of website traffic, user activity, and peak loads. However, the design changes described in this specification will yield many new features and services that are intended to increase usage of the HPC Web Portal, and which are likely to drive changes in the usage patterns of website visitors. For this reason, the historical data offered herein is provided only for informational purposes to facilitate system sizing. Proposers should anticipate a substantial increase of at least 200-300% in individual page views, pages per visit, and average visit duration as website visitors find content more easily and stay on the website longer.

Between October 1, 2015 and December 31, 2015, the HPC Website has experienced:

- Peaks of up to 289 users in a single hour.
- Peaks of up to 662 pageviews per hour.

In the month of November 2015, the HPC Website experienced:

- 101,665 page views
- Average 2.22 pages per session
- Average Session Duration of 2 minutes 55 seconds

In the last fiscal year, a total of 251,804 sales transactions were completed on-site and approximately 90,870 sales transactions were completed online. Each transaction represents one (1) or more *instruments*.

System Management Tools

The proposed solution must include system management tools and solutions that address the following areas:

- Tools to manage all web servers/sites from a central location or a group of web sites from a sub (department) location;
- Tools to manage the server operating system(s), web server(s) application(s), database management system(s), and user login accounts;
- All aspects of the web services solution is required to be managed remotely;
- Tools to measure performance, bandwidth and usage shall be provided; and
- Website administration software for posting and managing web content.

Output Requirements

E-mail Output

System email communications such as email confirmations, notices, etc. shall be sent as multi-part mime email messages containing both plain-text and HTML versions of the message content.

Reporting requirements

The HPC Portal System shall provide summary activity reports as follows:

- Only *CMS Administrator* shall have access to reports.

- Reporting period shall be definable by CMS Administrator at runtime.
- System shall produce the following reports upon request:
 - User Activity Report
 - Number of *Wizard Scenarios* Submitted
 - Number of Incomplete *Applications*
 - Value of Incomplete Applications
 - Number of New Instrument Applications Received
 - Value of New Instrument Applications Received
 - Number of Renewal Applications Received
 - Value of Renewal Applications Received
 - Total Value of All Applications Received
 - Search Activity Report
 - Search Terms Submitted
 - Frequency of Occurrence

Integration Requirements

Taxonomy

The taxonomy management tool and taxonomy database must be integrated with the CMS such that the taxonomy drives the browse feature of the HPC Web Portal directly and without requiring additional maintenance to modify the browse feature of the website following changes to the taxonomy.

Controlled Vocabulary & Thesaurus

The controlled vocabulary and thesaurus (related and non-preferred terms) must be integrated with the HPC Web Portal keyword search feature such that updates to them are reflected in the behavior of the keyword search feature and in its results without requiring additional maintenance beyond that required to maintain the controlled vocabulary & thesaurus.

Department Systems

The CMS will eventually be integrated with Department Systems to facilitate the exchange of data between them. At the time of this writing, the exact systems with which the CMS would be integrated are unknown. Consequently, it is impossible to define any specific integration points or the nature of their interfaces. However, the following list identifies potential candidate systems for future integration, and it is anticipated that some of the means of integration may include web services in a Service Oriented Architecture, XML data exchanges in batches or in real-time, direct updates to shared SQL databases, or the scheduled exchange of structured data files via FTP.

Proposers should carefully consider the list of candidate systems for potential integration, and understand from its scope the importance of an open and flexible system architecture that supports a variety of possible integration means. Candidate systems for potential future integration include, but are not limited to the following:

- Work Order
- Point of Sale
- Customer Queuing
- Billing
- Land Management
- Device Tracking
- Document Management

- GIS
- Infor Hansen
 - Enterprise
 - Asset Management
 - Data Marts
 - Permitting
 - CRD
 - EAM
 - CRM
 - Call Center
 - Motion, ION & Mingle

E-Signature Processing

The HPC Portal System must be integrated with a third-party *e-signature processing system* to fulfill the e-signature requirements of this RFP. At present, COH has no known relationships with third-party e-signature processors. The selected Proposer must provide a suitable solution based on these and anticipated future requirements.

Online Payment Processing

Online payment processing services for the HPC Portal System will be provided by Chase Payconnexion. The HPC Portal System must be integrated with their Orbital Payment Gateway product. The Chase Payconnexion Orbital Payment Gateway offers multiple integration options to best fit a particular technical environment. The selected Proposer shall evaluate available options, and propose the option best suited to meet the requirements herein based on the CMS architecture and solution ultimately proposed.

Compatibility Requirements

Browser Compatibility

The Management Portal (the internally-facing website) shall be implemented in a manner that supports Internet Explorer versions 9 and later.

Display Compatibility

The Management Portal (the internally-facing website) shall be implemented in a manner such that presentation is optimized for desktop computer displays having a resolution of 768 x 1024 or greater. Responsive web design is not a requirement for the Management Portal.

Physical Requirements

Content Items

The estimated numbers of content items to be managed during the first year of production are:

- 1,200 Electronic Forms
- 4,000 Pages HTML
- 6,000 Frequently Asked Questions with Answers
- 3,600 Related Documents (as PDF or HTML)
- An indefinite number of end-user attachments uploaded along with applications

Database

The estimated minimum database size required for the first year of production is 3 terabytes. This is a very rough estimate based largely on an average estimated requirement of 3 megabytes data storage for each instrument application received, including its attachments.

Data Archiving

- System shall maintain a minimum of two (2) years of transaction data online.
- Transaction data aged more than two (2) years shall be moved to a *nearline* archive system.
- Nearline archive data will be maintained for a minimum of seven (7) years.
- Some data must be maintain permanently in offline archives.
- Proposer must provide viewer capabilities to view nearline and offline archive data for the duration of its lifecycle.

Backup & Disaster Recovery

System shall be configured for high availability, data replication or mirroring, and to automatically maintain the following backup schedule:

- A monthly full backup shall be maintained;
- A weekly incremental backup shall be maintained; and
- A daily incremental backup shall be maintained.

All backups shall be maintained in two (2) locations, as follows:

- One (1) copy of each backup shall be maintained at the local data center; and
- One (1) copy of every backup shall be transferred within 24 hours following its creation to the disaster recovery site.

Human Factor Requirements

User Interface Language Support

The Management Portal user interface shall be implemented in United States English language only.

Content Publishing Language Support

The CMS must support the creation, management, and publishing of individual versions of all content in the following languages:

- United States English (IETF en-US)
- Latin American Spanish (IETF es-419)
- Vietnamese (IETF vi)

Help System

The Management Portal shall provide context sensitive online help pages that:

- Explain the purpose and overall goal of each feature of the Management Portal;
- Describe the controls of each feature and their behaviors in detail; and
- Provide links to related help resources, if any.

PART III

Existing Software

The HPC intends to leverage the existing “Decision Engine” software ([INFOR Configurator](#)). Proposers will analyze software functionality and usability and provide comments and recommendations.

Hardware

The HPC intends to leverage our existing infrastructure and virtual server environments as resources for this project. Proposers will review existing infrastructure environment and provide a feasibility analysis and cost for leveraging, enhancing, or replacing the existing infrastructure environments.

Proposer will include infrastructure plans for local data center and the disaster recovery site

Existing Systems & Applications are identified in the following three (3) tables presented on the next pages:

- TABLE 1 - Web/Content Management
- TABLE 2 - Virtual Environment
- TABLE 3 – Future System Integration

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TABLE 1 - WEB / Content Management

Description	Name	Software	Version	Cloud=© Server Farm=(S) DMZ=(D)	Virtual=(V) Physical=(P)	OS	CPU's	MEM	DBMS	Storage	Location
HPC Web Portal	pwehpc	Joomla	3.0	©	V	Linux	4	4g	MYSQL	325g	Amazon Cloud
Content Mananagement PROD	cmsweb	Joomla	3.0	S	V	Linux	4	4g	MYSQL	900g	Data Center
Content Mananagement DEV	cmswebd	Joomla	3.0	S	V	Linux	1	2g	MYSQL	140g	Data Center
Calendar Appoint Scheduler	Qflow			Vendor Hosted	V				SQL		ACF Technology

TABLE 2 - Virtual Environment

Description	Name	Software	Version	Cloud=© Server Farm=(S) DMZ=(D)	No of Hosts	OS	CPU's	MEM Per Host	DB	Storage	Location
Production	Cluster 1	Vsphere, Vcenter	5.1	S	18	ESX	2 proc 10 cor	172 g	SQL	43 TB	Data Center
Production	Cluster 2	Vsphere, Vcenter	5.1	D	4	ESX	2 proc 10 cor	172 g	SQL		Data Center
			--		Shared						
Disaster Recovery	DR Cluster	Vsphere, Vcenter	5.1	F	5		2 proc 10 cor	172 g	SQL	79 T	DR Site

TABLE 3 - Future System Integration

Application/ System	Description	Vendor	Implement Date	Software Version	Integrated w/ which systems	OS	Prog. Lang.	DBMS	# of Servers	Server Type Phys. or Virt.
ILMS	Code Enforcement Permitting System	Gartek	1987	4.82	TeleWorks, SOA, OMPlus	Unix / Windows	VB, Cobol	Oracle 11g	6	Both
iPermit	iPermit Contractor & Customer Portal	Gartek & J.P.Morgan Chase	2011	Same as ILMS	ILMS online exposed to the public.	Same as ILMS	Same as ILMS	Same as ILMS	Same as ILMS	Same as ILMS
ePlus	Document archiving system	ePlus	2001		ILMS	Windows	****	Oracle	2	Virtual
SOA	Oracle Fusion - Service Oriented Architecture	Oracle	Dec-10	11.13	ILMS, WCIS, iNovah, IMS, EAM, IPS	Linux		Oracle	8	Both
PWE GIMS	PWE graphical display of COH infrastructure	In-House		1.1	None	Linux		Oracle	4	Both
Qflow	Customer queueing & routing system	ACF Technology	Jun, 2011	5.8	None	Windows	C++	SQL	6	Virtual
FAMS	False Alarm Management System - ARA	PMAM	Jun-05		iNovah, OMPlus	Windows	*****	SQL	Hosted by Vendor	Hosted by Vendor
CDP	Commercial & Transportation System - ARA	Gov Partners	30-Jun-08	Web V11.1	iNovah, OMPlus	Windows	*****	SQL	Hosted by Vendor	Hosted by Vendor
Enterprise Asset Management, Data Marts and Permitting, CRD, EAM, CRM, Call Center, Motion, ION & Mingle	Enterprise	Infor Hansen								

Warranty

All Proposers shall provide a written exhibit detailing any warranties and guaranties that come with their proposed solution in the Technical Proposal.

The selected Proposer shall warranty all services provided, software and installation components for one (1) year. The selected Proposer will replace any malfunctioning item during the warranty period and provide services corrections at no cost to the City

Maintenance and Support

Proposer will provide an itemize cost list for extended maintenance and support services for 3-years with two (2) optional one (1) year renewal periods. Proposers shall provide maintenance and support on a five (5) day a week, 24 hours per day.

Major maintenance shall be performed on site.

Installation Requirements

The selected Proposer must fully deploy the System, including installation, configuration, and testing of it in separate instances in a staged deployment environment consisting of three (3) instances:

- Development Instance
- Testing Instance
- Production Instance

All three (3) instances described above shall be installed at the local data center and the disaster recovery site.

Documentation

Application and system documentation will be provided by the selected Proposer at no additional charges. Documents must be clearly written, user-oriented and must include the following:

- System Design
- System Flow
- File descriptions
- Data Structures
- Data Dictionary
- Program functions and logic descriptions
- Program code listings
- Description of all system controls
- Operating procedures
- Screen Layout
- Report procedures
- User Operation Manual
- System Administration & Configuration Management Manual

- “As-Built” Design & Configuration Document

Security

The proposed solution must provide security controls to protect the system and its information by controlling access to critical or sensitive functions. Access control must support access permissions that are configurable for each menu item based on user role. Security levels and permission for access shall be maintained on the system and verified against required access level for each menu item.

The selected Proposer shall provide for the duration of the agreement and keep current:

- Security patches
- Operating System
- Applications coding and programs
- Software releases and version control

Training

After successful installation and testing, the selected Proposer shall plan and provide a thorough program of instructional services (including all appropriate documents and visual aids) sufficient to instruct applicable COH personnel.

The selected Proposer shall provide training in reference to deployment, management, maintenance, and administration of the solution for a minimum of twenty (20) COH employees for user operation and five (5) COH employees for system management and administration.

In addition, Proposer shall provide training to facilitate the transfer of operational knowledge related to the development of database structure and application coding required for COH to fully maintain applications, develop future enhancements, and system support.

Acceptance Criteria

The City and the selected Proposer will refine and agree on the tasks, as appropriate, to establish testing parameters and acceptance criteria that the City will use to validate whether the HPC Portal System meets the City's requirements for each of the following categories:

- System satisfies the Functional Requirements and Use Cases described herein
- System satisfies the Browser Compatibility requirements for:
 - Public Portal and Private Portal
 - Management Portal
- System satisfies the Physical and Performance requirements prescribed herein.
- System satisfies the Human Factors requirements prescribed herein for each of the following:
 - Language Support
 - Accessibility
 - Online Help Resources
- System satisfies the Backup and Disaster Recovery requirements.

The selected Proposer shall present and review with the project stakeholders the completed documentation to ensure the requirements are satisfied.

The selected Proposer shall perform a test demonstrating their application and a system reliability test prior to the initiation of installation of the system proposed. In addition, the selected Proposer shall demonstrate the capability of their proposed system to automate recovery of data and to deliver that data to a specified location within the COH.

Additions & Deletions

The Purchasing Agent or Director, by means of a written authorization to the selected Proposer may add other facilities to this Contract and any item or services provided by the selected Proposer that are reasonably related to the scope of this Contract. The Purchasing Agent or Director may also delete facilities, items or services by written notice. Written notification of deletion facilities, items, or services shall take effect upon the selected Proposer's receipt of such notice or on such other days as specified therein.

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APPENDICES

APPENDIX A – Site Map

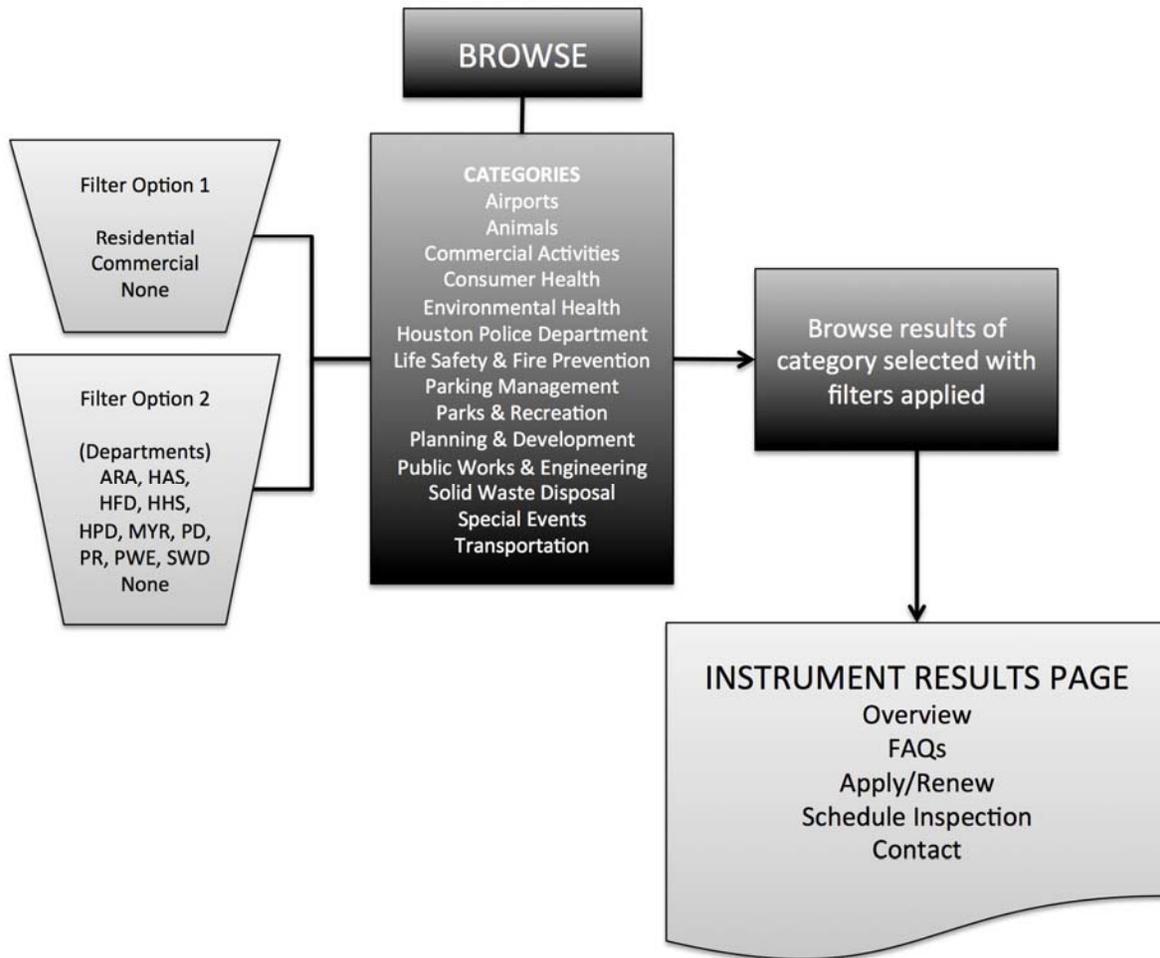
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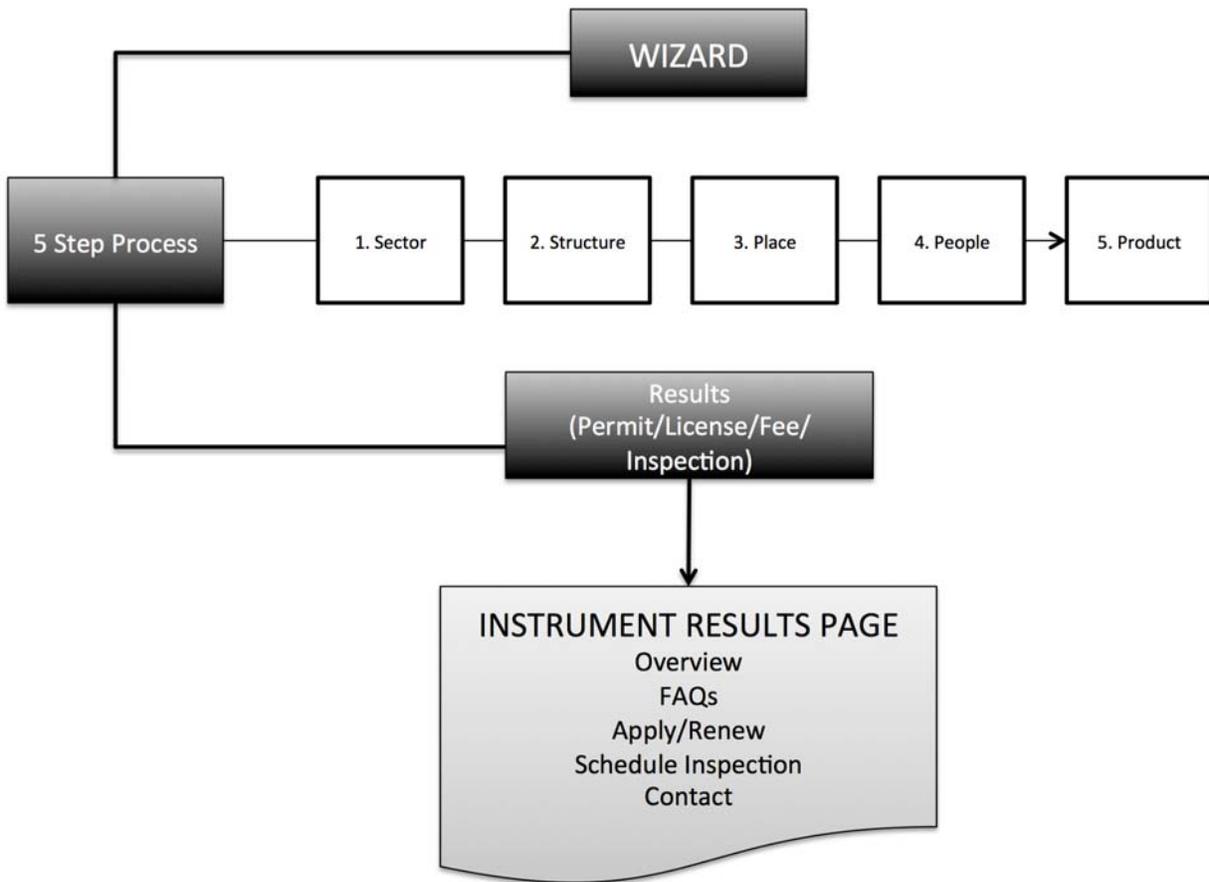
Secondary Global Navigation



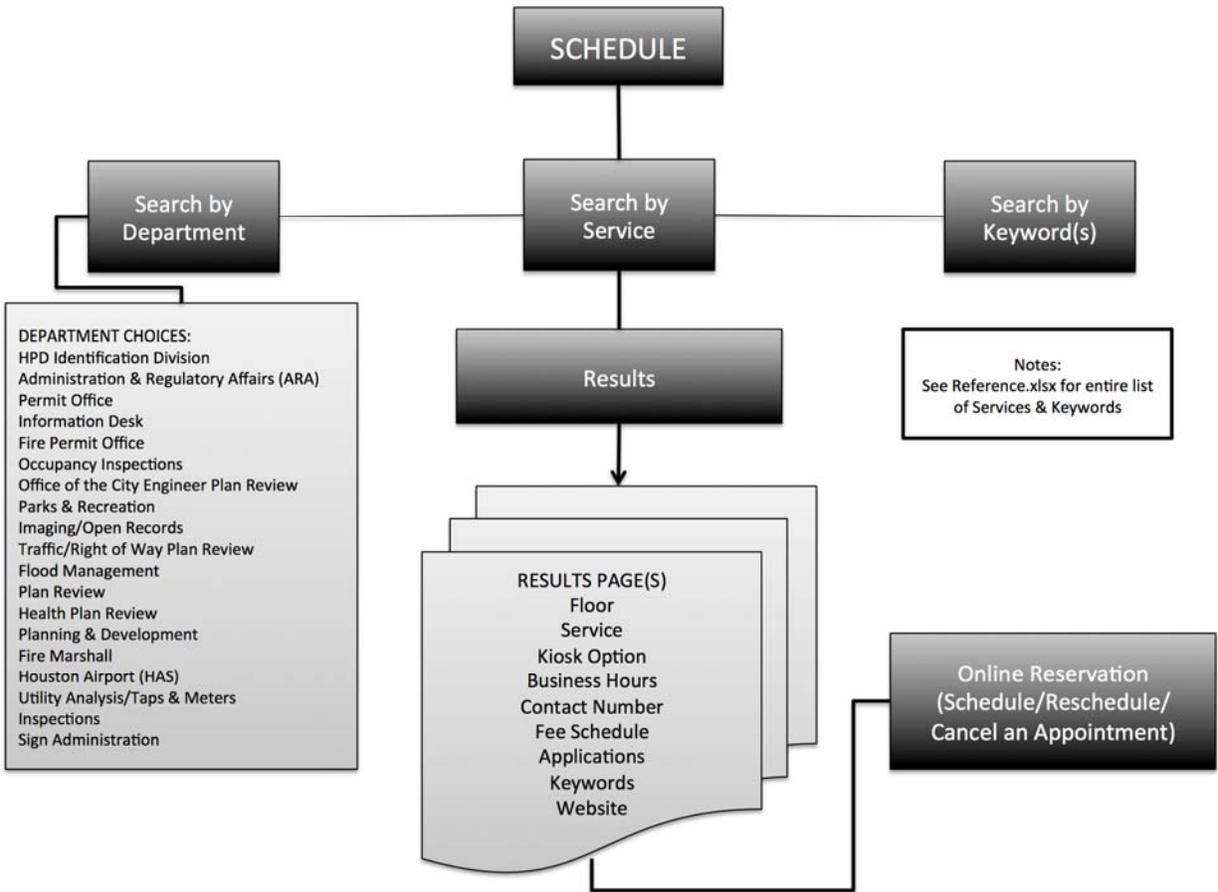
Browse



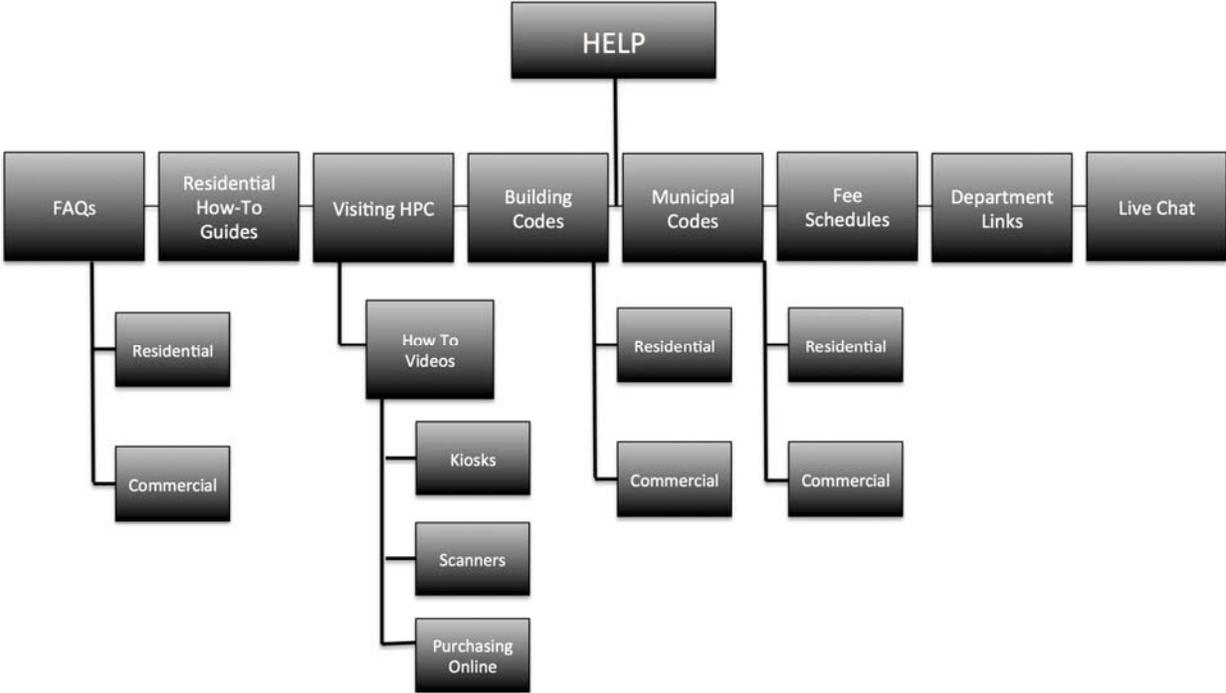
Wizard



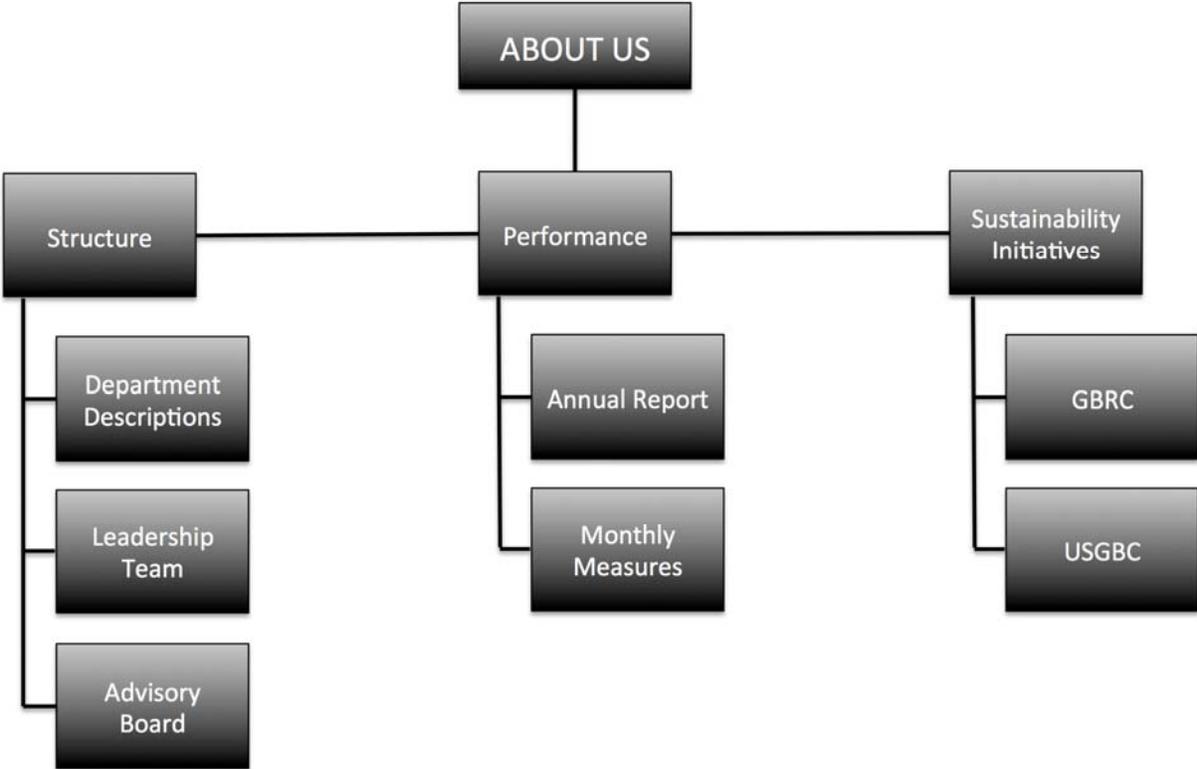
Schedule



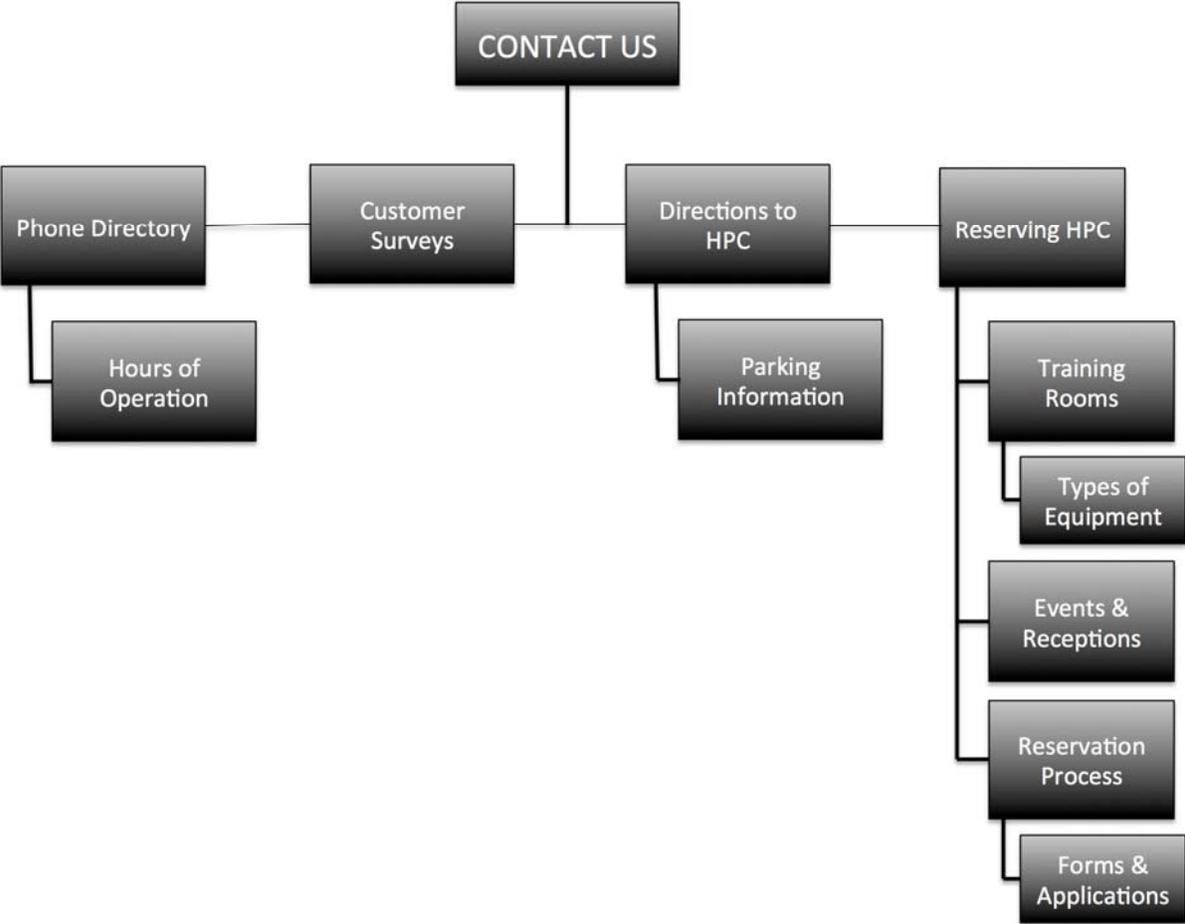
Help



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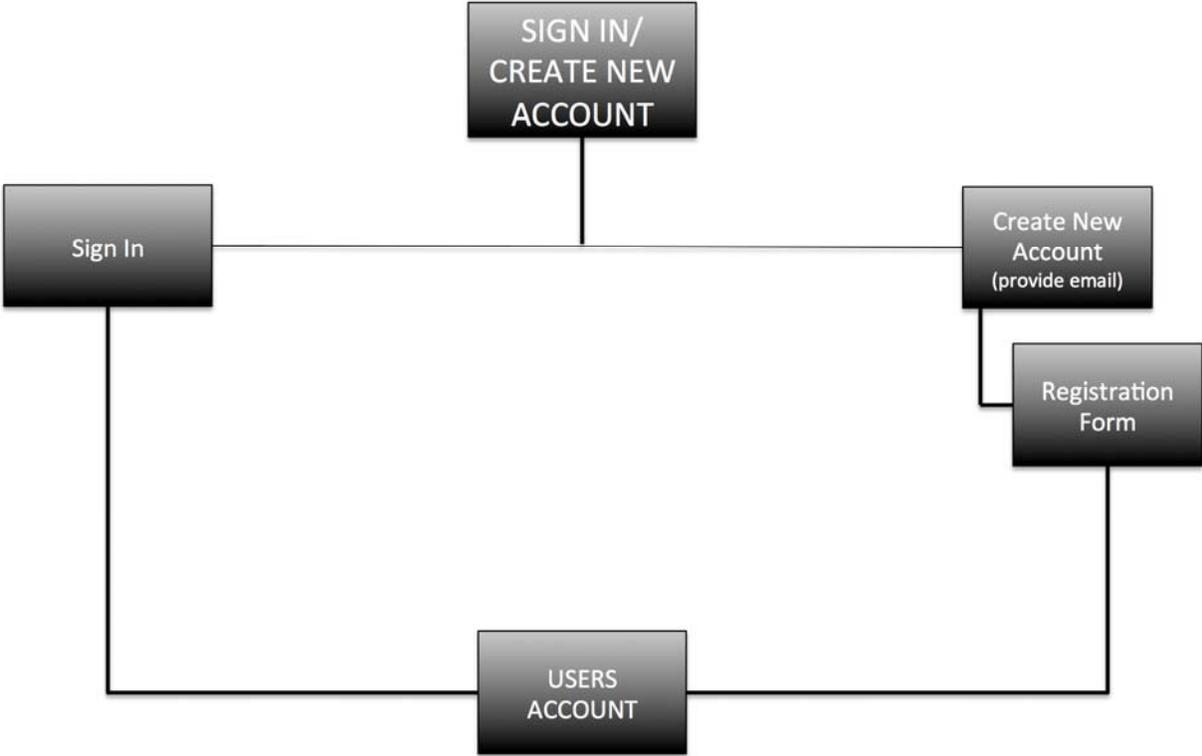


News & Events



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Sign In / Create New Account



APPENDIX B - HPC Use Case Specifications

Use Case Rationale

The use cases documented herein are intended to be as generic in nature as reasonably possible while expressing key features and system behavior that City of Houston requires, without over-specifying the details of their implementation. This approach is intended to allow for flexibility in product choice and implementation without sacrificing the spirit or essence of the requirement.

Understanding a Use Case Specification

For the benefit of reviewers who are unfamiliar with Use Case Specifications, the individual parts of the specification are identified and explained in detail below.

Use Case Number & Name

These identifiers are unique to a single *use case* and are used to reference the use case throughout this specification and supporting project documents.

Goal

A one or two line summary of what the use case achieves for its actors.

Actors

Identifies the *actors* involved in the use case, and any context regarding their involvement.

Note: This is not a description of the actor. That is provided elsewhere in this document.

Pre-conditions

A statement of any simplifying assumptions we can make at the start of the use case.

Basic Flow

A linear sequence of steps that describe the behavior of the use case in a “normal” scenario. Where a use case has a number of scenarios that could be normal, one is arbitrarily selected.

Alternate Flows

A series of linear sequences describing each of the alternative behaviors to the basic flow, if any exist.

Post-conditions

A statement of any assumptions we can make at the end of the use case. These are most useful when the use case is one of a series of subsidiary use cases that are included in a main use case, where they form the pre-conditions of the next use case to be included.

Requirements

Describes related requirements; included inline or cross-referenced to requirements documented elsewhere in this specification.

Related GUI Elements

A list of related Graphical User Interface elements that are rendered as wireframes or visual design mockups and provided elsewhere in this specification.

UC1: Bookmark an Instrument

Goal

Enable a *Registered Guest* to create and save a reference and hyperlink to a specific *instrument* that is used to shortcut normal navigation so they can quickly return to an instrument of interest or relevance to their needs at a later time.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

1. While viewing the Instrument Home View, a Registered Guest clicks the Bookmark Button.
2. The HPC Portal System saves a reference to the instrument as a *bookmark*.
3. The HPC Portal System notifies the user of successful completion of the operation.

Alternate Flows

A1 – Bookmark Already Exists

A1.1 – Registered Guest clicks the Bookmark Button.

A1.2 – System does not save reference to the instrument as a bookmark.

A1.3 – System notifies user the bookmark already exists.

Post-conditions

A bookmark referencing the instrument is saved.

Requirements

1. System must implement a feature that provides the capability for a Registered Guest to bookmark an instrument.
 - 1.1. System must verify that user is authenticated as a Registered Guest.
 - 1.2. System must allow for creation of at least 50 bookmarks by user.
 - 1.3. The bookmark must contain a reference to the specific instrument marked by the user.
 - 1.3.1. Clicking the bookmark label shall navigate to the Instrument Home View for the referenced instrument.
 - 1.4. The name or label of the bookmark must be the instrument name.

Related GUI Elements

Bookmark Button

Instrument Home View

UC2: Browse Content by Taxonomy

Goal

Enable a *Guest* user to navigate a hierarchically organized listing of *instrument* categories and instruments to locate content.

Actors

Guest

Pre-conditions

None

Basic Flow

1. User clicks "Browse" in HPC Main Navigation Menu.
2. System presents the Browse Content by Taxonomy View containing a listing of the content taxonomy, along with options to browse all instruments, filter for residential or commercial instruments only, and filter by HPC department.
3. User selects filter options.
4. System refreshes the listing of the content taxonomy that is now filtered to exclude categories and instruments not chosen by user.
5. User clicks a category of interest from the remaining categories.
6. User continues to drill down into categories of interest until reaching the lowest level.
7. At lowest level, user selects a specific Instrument by clicking its name.
8. System presents the Instrument Home View for the selected instrument.

Alternate Flows

None

Post-conditions

None

Requirements

1. System must implement a feature that provides the capability for a Guest user to navigate a hierarchically organized listing of content categories to locate content.
 - 1.1. System must enable user to filter the listing of content categories and instruments based on their categorization as either commercial or residential categories and instruments. Filter choices must include:
 - 1.1.1. All categories and instruments
 - 1.1.2. Only residential categories and instruments
 - 1.1.3. Only commercial categories and instruments
 - 1.2. System must enable user to filter the listing of content categories and instruments by selecting the departments to include categories and instruments for. Filter choices must include all of the following:
 - 1.2.1. All categories and instruments
 - 1.2.2. Administration & Regulatory Affairs (ARA)
 - 1.2.3. Houston Airport System (HAS)
 - 1.2.4. Houston Fire Department (HFD)
 - 1.2.5. Health & Human Services (HHS)
 - 1.2.6. Houston Police Department (HPD)
 - 1.2.7. Mayor's Office (MYR)
 - 1.2.8. Planning & Development (PD)
 - 1.2.9. Parks & Recreation (PR)
 - 1.2.10. Public Works & Engineering (PWE)
 - 1.2.11. Solid Waste Management (SWD)

Related GUI Elements

HPC Main Navigation Menu

Browse Content by Taxonomy View

Instrument Home View

UC3: Chat with Agent

Goal

Enables a *Guest* to engage in a real-time interactive chat with an *Agent*.

Actors

Guest

Pre-conditions

An Agent is logged in to the Online Chat component of the System.

Basic Flow

1. A Guest clicks the Online Chat Icon.
2. The HPC Portal System presents the Guest Online Chat Form.
3. The Guest enters their name and submits the content of their first message.
4. The HPC System initiates the Chat with Guest use case.

Alternate Flows

A1 – No Agent is logged in to the Online Chat component of the System

A1.1 – The HPC Portal System hides the “Online Chat” icon, thereby preventing Guests from initiating the use case.

Post-conditions

None

Requirements

1. The System must provide a feature that enables a Guest to engage in a real-time interactive chat with an Agent.
 - 1.1. System must provide a clickable Online Chat Icon that advertises the availability of the chat feature.
 - 1.1.1. When Guest clicks the Online Chat Icon, the System must initiate a chat session with an available Agent.
 - 1.1.2. If no Agent is available, the Online Chat Icon must be made invisible on the HPC Portal site.
 - 1.2. All messages exchanged using the chat feature must be encrypted using 128-bit (or greater) SSL encryption.
 - 1.3. It is not a requirement to maintain a persistent record of either the occurrence or the content of any chat sessions.
 - 1.4. System must provide a means by which a CMS Administrator can enable or disable the Chat with an Agent feature in its entirety by merely activating or deactivating a “switch” in the Management Portal.

Related GUI Elements

Guest Online Chat Form

Online Chat Icon

UC4: Chat with Guest

Goal

Enables an *Agent* to engage in a real-time interactive chat with a *Guest*.

Actors

Agent

Pre-conditions

An Agent is logged in to the Online Chat component of the System.

A Guest has initiated the Chat with Agent use case.

Basic Flow

1. HPC Portal System presents the Online Chat Agent User Interface.
2. Agent engages in an interactive online chat with Guest.

Alternate Flows

A1 – No Agent is logged in to the Online Chat component of the System

A1.1 – The HPC Portal System hides the “Online Chat” icon, thereby preventing Guests from initiating the use case.

Post-conditions

None

Requirements

Documented in UC3 – Chat with Agent

Related GUI Elements

Online Chat Agent User Interface

UC5: Create & Publish an Article

Goal

Enable a *Content Manager* user to create and publish a content article to either the Public Portal or Private Portal.

Actors

Content Manager

Pre-conditions

User is authenticated as a Content Manager.

Basic Flow

1. Content Manager initiates the use case by accessing the Add New Article View from the Content Manager Dashboard View.
2. Content Manager provides a title for the new article.
3. Content Manager selects a category for the new article from categories defined in the content taxonomy.
4. Content Manager enters the body of the article, including images if desired, using an embedded HTML editor in the Add New Article View.
5. Content Manager sets the access level for the new article based on whether the content is to be published in the Public Portal or Private Portal.
6. Content Manager sets the language of the content.
7. Content Manager sets the status of the new article to "Published".
8. Content Manager saves the new article.

Alternate Flows

None

Post-conditions

Article is saved in CMS.

Article is published and visible on the HPC Portal.

Requirements

1. The System must provide a feature that enables a Content Manager user to create and publish a content article to either the Public Portal or Private Portal.
 - a. The Create and Publish an Article feature must be accessible only by users having the Content Manager or a higher authority role in the HPC Management Portal.
 - b. System must support the assignment of articles to one and only one category from the content categories defined in the content taxonomy.
 - c. System must provide a WYSIWYG HTML editor for entering and editing the content of the article body.
 - i. The HTML editor must support the inclusion of images in the bodies of articles.
 - ii. The HTML editor must support the formatting of text by selecting from the standard text styles defined in the Style Guide included in this specification.
 - d. System must support the ability to specify an access level for an article based on whether the article should be published in the Public Portal or Private Portal.
 - e. System must support the creation and publishing of multiple versions of a single article so that an article can be published in each of the supported HPC Portal languages.

- f. System must support the ability to set and change the publishing status of articles, with support for the following statuses (at minimum):
 - i. Published
 - ii. Unpublished

Related GUI Elements

Add New Article View

Content Manager Dashboard View

UC6: Create Registered Guest User Account

Goal

Enable a *Guest* user to create a *Registered Guest* user account to gain access to additional features and services that are available only in the Private Portal.

Actors

Guest

Pre-conditions

None

Basic Flow

1. A Guest user initiates the use case by clicking the “Sign Up” link in the Sign In / Sign Up Pane of the Home Page
2. System presents the Create New Account Form.
3. User enters their full name and a valid email address.
4. User enters a password, and enters it a second time for verification.
5. User submits form.
6. System verifies account doesn’t already exist and password meets minimum password strength requirements.
7. System confirms successful creation of account and informs user that an account activation email will be sent.
8. System sends account activation email to the email address provided by user.
9. User receives account activation email and clicks activation link in email.
10. System informs user that their account has been activated, and that they may now log in to the HPC Portal.

Alternate Flows

None

Post-conditions

A *user account* exists for the new Registered Guest.

An *account profile* exists for the new Registered Guest, but is empty until updated.

Guest is elevated to the role of Registered Guest and access permissions are increased accordingly.

Requirements

1. The System must provide a feature that enables a Guest user to create a Registered Guest User Account to gain access to additional features and services that are available only in the Private Portal.
 - 1.1. To create a Registered Guest account, a user must provide the following minimum information:
 - 1.1.1. First Name
 - 1.1.2. Last Name
 - 1.1.3. Valid Email Address
 - 1.2. The user’s email address shall be used as their User ID.
 - 1.3. System must verify that the desired User ID is not already in use.
 - 1.4. System must validate the email address entered as well-formed according to correct standards for an internet email address.
 - 1.5. System must validate the password entered as follows:

- 1.5.1. Both instances of the password entry must match.
- 1.5.2. Password must meet the following criteria:
 - 1.5.2.1. Minimum length of 8 characters
 - 1.5.2.2. Must contain mix of uppercase and lowercase characters
 - 1.5.2.3. Must contain at least 1 number
 - 1.5.2.4. Must not contain any portion of the User ID
- 1.6. System must send an activation email to the user.
 - 1.6.1. Activation email shall be sent to the email address provided upon user account creation.
 - 1.6.2. Activation email shall contain a link that when clicked will activate the user account.
 - 1.6.3. System must delete all accounts that are not verified within 36 hours of creation.

Related GUI Elements

Home Page

Sign-In / Sign-Up Pane

Create New Account Form

UC7: Discover Content w/ Wizard

Goal

Enable a *Guest* user to discover content by interacting with a *wizard* and providing answers to a series of questions that enable the *HPC Portal System* to present a filtered collection of relevant *instruments* to the user.

Actors

Guest

Pre-conditions

None

Basic Flow

1. Guest user initiates the use case by clicking the “Wizard” menu item in HPC Main Navigation Menu.
2. System presents the Wizard Scenario View containing a series of questions in five (5) top-level categories to which the user must select all responses that apply. The categories are: Sector, Structure, Place, People, and Product.
3. User provides a descriptive name that uniquely identifies the scenario, and the by providing answers to questions in all five categories, the user defines a *wizard scenario* that describes the nature of their business.
4. The user submits the wizard scenario to obtain results from the HPC Portal System.
5. If the user has not answered any questions in one or more categories, the HPC Portal System presents a system message identifying the categories where no answers were provided, and prompts user to complete the scenario to obtain more accurate results.
6. HPC Portal System responds by saving the completed wizard scenario, and presents the Wizard Results View containing a collection of relevant *instruments* organized in categories based on the standardized HPC instrument *taxonomy*.
7. User selects a specific instrument of interest by clicking its name.
8. HPC Portal System presents the Instrument Home View for the selected instrument.

Alternate Flows

None

Post-conditions

None

Requirements

1. System must implement a feature that enables *Guest* users to discover content by interacting with a *wizard* to provide answers to a series of questions that enable the *HPC Portal System* to present a filtered collection of relevant *instruments* to the user.
 - 1.1. System shall present questions on a series of pages, with each page addressing one of the following top-level categories:
 - 1.1.1. Sector
 - 1.1.2. Structure
 - 1.1.3. Place
 - 1.1.4. People
 - 1.1.5. Product
 - 1.1.6. Within each top-level category, individual questions shall be organized into sub-categories that are defined by the CMS Administrator in the wizard's configuration.

- 1.2. Questions shall be primarily, though not exclusively, of the following two (2) types:
 - 1.2.1. Questions that are answered with a simple Yes or No response.
 - 1.2.2. Questions that allow multiple responses in the form of checkboxes where user is expected to select all that apply.
- 1.3. Upon submission of responses, System shall prompt Registered Guest users to optionally provide a unique descriptive name to identify the scenario.
- 1.4. Upon submission of responses, if user has provided a descriptive name for the scenario, System shall save the completed scenario, making it available for Registered Guest users to recall later (see also [Manage Wizard Scenarios](#) use case).
- 1.5. Upon submission of responses, System shall validate that user has answered at least one question in one top-level category. No more than a single response in a single top-level category shall be required to generate wizard results.
- 1.6. Upon submission of responses, System shall present the Wizard Results View.
 - 1.6.1. The Wizard Results View shall present a list of all related instruments that are considered relevant to the scenario based on the wizard configuration.
 - 1.6.1.1. Related instruments shall be organized according to the wizard top-level and sub-categories defined in the wizard configuration.
 - 1.6.1.2. Related instruments shall be presented as hyperlinks to the Instrument Home View of the instrument they reference.

Related GUI Elements

HPC Main Navigation Menu
Wizard Scenario View
Wizard Results View
Instrument Home View

UC8: Download / Print Related Document

Goal

Enable a *Guest* user to download or print a *related document* for offline use.

Actors

Guest

Pre-conditions

A “printable” version of the *related document* has been published as a PDF.

Basic Flow

F1 – Download a Document

1. While viewing a document in the Related Document View, user clicks the View in Printable/Downloadable Format Link.
2. System presents the document in PDF format in the View as PDF Screen in a new window.
3. User clicks the Acrobat Reader Save Icon.
4. Adobe Acrobat Reader presents the Save As Dialog Box.
5. User selects desired options for saving file, and clicks “Save”.
6. PDF file is saved to user’s local hard drive.

Alternate Flows

A1 – Print a Document

1. While viewing a document in the Related Document View, user clicks the View in Printable/Downloadable Format Link.
2. System presents the document in PDF format in the View as PDF Screen in a new window.
3. User clicks the Acrobat Reader Print Icon.
4. Adobe Acrobat Reader presents the Print Dialog Box.
5. User selects desired print options, and clicks “Print”.
6. PDF file is printed on user’s local printer.

Post-conditions

None

Requirements

- 1.0 System must provide a feature that enables a Guest user to download or print a *related document*, for offline use.
 - 1.1 System must provide a means of publishing PDF versions of *related documents* as alternate representations of their *source documents* which may be in another form (i.e. - HTML)
 - 1.2 System must provide a means by which a user can print the PDF file.
 - 1.3 System must provide a means by which a user can save a copy of the PDF file to their local hard drive.

Related GUI Elements

Related Document View

View in Printable/Downloadable Format Link

View as PDF Screen

Adobe Acrobat Reader Print Icon

Adobe Acrobat Reader Save Icon
Print Dialog Box
Save As Dialog Box

External Dependencies

Requires Adobe Acrobat Reader installed on user's computer.

UC9: Exchange Application Data

Goal

Synchronize records between the *HPC Portal System* and a target *Department System* by transferring online application data submitted by a *Registered Guest* user from the HPC Portal System to a target Department System for processing.

Actors

HPC Portal System
Department System

Pre-conditions

Records exist in the HPC Portal System database that have not been synchronized with the target Department System.

Basic Flow

TBD

NOTE: This specification of this use case is intentionally incomplete and will remain so pending availability of details from appropriate stakeholders in COH. This detail, including the identification and specification of specific system interfaces will be provided at design time.

Alternate Flows

None

Post-conditions

Records are synchronized between the HPC Portal database and the target Department System.

Requirements

1. The System must provide a means to synchronize records between the HPC Portal System and one or more target Department Systems by transferring online application data submitted by a Registered User from the HPC Portal System to a target Department System for processing.

Related GUI Elements

None

UC10: Login to Management Portal

Goal

Provide access control for the Management Portal by authenticating a user as a valid *Agent* before granting access to the content and features of the Management Portal.

Actors

Agent

Pre-conditions

None

Basic Flow

1. User enters user name and password into the Management Portal Login Form and submits the form.
2. HPC Portal System authenticates user as a valid Agent and presents the Agent Dashboard View to user.

Alternate Flows

A1 – User is a *Content Manager*.

1. User enters user name and password into the Management Portal Login Form and submits the form.
2. HPC Portal System authenticates user as a valid Content Manager and presents the Content Manager Dashboard View to user.

A2 – User is a *CMS Administrator*.

1. User enters user name and password into the Management Portal Login Form and submits the form.
2. HPC Portal System authenticates user as a valid CMS Administrator and presents the CMS Administrator Dashboard View to user.

Post-conditions

User is authenticated as an Agent.

Requirements

1. System must provide access control for the Management Portal by authenticating users before granting access to the content and features of the Management Portal.
 - 1.1. System shall support three (3) user roles in in the Management Portal: Agent, Content Manager, CMS Administrator
 - 1.1.1. Agent users shall have access to the following Management Portal features:
 - 1.1.1.1. Chat with Guest
 - 1.1.1.2. Manage Online Applications Received
 - 1.1.2. Content Manager users shall have access to the following Management Portal Features:
 - 1.1.2.1. Create & Publish an Article
 - 1.1.2.2. Manage Taxonomy
 - 1.1.2.3. Manage Thesaurus
 - 1.1.3. CMS Administrator users shall have access to the following Management Portal Features:
 - 1.1.3.1. Manage User Surveys
 - 1.1.3.2. Manage Online Forms

- 1.1.3.3. Manage User Account
- 1.1.3.4. Maintain Wizard
- 1.2. System must support assignment of multiple roles to a user.

Related GUI Elements

Management Portal Login Form
Agent Dashboard View
Content Manager Dashboard View
CMS Manager Dashboard View

UC11: Login to Private Portal

Goal

Provide access control for the Private Portal by authenticating a user as a valid *Registered Guest* before granting access to the content and features of the Private Portal.

Actors

Registered Guest

Pre-conditions

None

Basic Flow

1. User enters user name and password into the Private Portal Login Form and submits the form.
2. HPC Portal System authenticates user as a valid Registered Guest and allows access to the content and features of the HPC Private Portal.

Alternate Flows

A1 – Incomplete Profile

1. User enters user name and password into the Private Portal Login Form and submits the form.
2. HPC Portal System prompts user to complete their *Account Profile*.

A2 – User forgot password

1. User clicks the Forgot Password Link.
2. HPC Portal System sends an email message to user with instructions explaining how to reset their password.

A3 – User attempts to access Private Portal feature without first logging on to Private Portal

1. HPC Portal System informs user they must first login as a Registered Guest to gain access to the feature, and presents user with the Private Portal Login Form.
2. User enters user name and password into the Private Portal Login Form and submits the form.
3. HPC Portal System authenticates user as a Registered Guest and allows access to the content and features of the HPC Private Portal.

Post-conditions

User is authenticated as a Registered Guest.

Requirements

1. The System must provide access control for the Private Portal by authenticating users before granting access to the content and features of the Private Portal.
 - 1.1. System shall support only one (1) user role in in the Private Portal: Registered Guest
 - 1.1.1. Registered Guest users shall have access to the following Private Portal features:
 - 1.1.1.1. Edit Account Profile
 - 1.1.1.2. Change Password
 - 1.1.1.3. Bookmark an Instrument
 - 1.1.1.4. Manage Bookmarks
 - 1.1.1.5. Save a Wizard Scenario

- 1.1.1.6. Schedule an Event
- 1.1.1.7. Create/Edit an Application
- 1.1.1.8. Manage Application Attachments
- 1.1.1.9. Submit an Online Application
- 1.1.1.10. Manage Applications
- 1.1.1.11. Download/Print an Offline Application

Related GUI Elements

Private Portal Login Form

UC12: Logout of Management Portal

Goal

Provide a secure exit from the Management Portal by invalidating an authenticated *Agent* user's session and any related authentication tokens.

Actors

Agent
Content Manager
CMS Administrator

Pre-conditions

User is authenticated as an Agent, Content Manager, or CMS Administrator

Basic Flow

1. User clicks the Logout Link.
2. HPC Portal System invalidates user's session and returns user to the Management Portal Login Form.

Alternate Flows

None

Post-conditions

User is not authenticated as an Agent.

Requirements

1. System must provide a secure exit from the Management Portal by invalidating an authenticated Agent User's session and any related authentication tokens.
 - 1.1. In the event an authenticated user does not actively logout, then System shall invalidate the user's session after no more than 15 minutes of inactivity.

Related GUI Elements

Logout Link
Management Portal Login Form

UC13: Logout of Private Portal

Goal

Provide a secure exit from the Private Portal by invalidating an authenticated *Registered Guest* user's session and any related authentication tokens.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

1. User clicks the Logout Link.
2. HPC Portal System invalidates user's session and returns user to the Home Page.

Alternate Flows

None

Post-conditions

User is not authenticated as a Registered Guest.

Requirements

1. System must provide a secure exit from the Private Portal by invalidating an authenticated Registered Guest user's session and any related authentication tokens.
 - 1.1. In the event an authenticated user does not actively logout, then System shall invalidate the user's session after no more than 15 minutes of inactivity.

Related GUI Elements

Home Page

UC14: Edit Account Profile

Goal

Enable a *Registered Guest* to edit and save the data in their own *Account Profile*.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

1. User clicks the “Edit My Profile” menu item in the My Account Menu.
2. HPC Portal System presents the Edit Profile View showing the user’s account profile data in an editable form presentation.
3. User edits their account profile by changing the values of existing data, or by entering additional data in fields that are blank or unanswered.
4. User clicks “Save” button.
5. HPC Portal System saves the edited data in the user’s account profile.
6. HPC Portal System presents a system message informing the user that their account profile changes have been saved.

Alternate Flows

A1 – User cancels the Edit My Profile action

4. User clicks “Cancel” button.
5. HPC Portal System does not save the edited data.
6. HPC Portal System presents a *system message* informing the user that their *account profile* changes were cancelled.

Post-conditions

The user’s edited account profile data is saved in the HPC Portal System database.

Requirements

1. System must maintain account profile data for each Registered Guest user.
 - 1.1. The account profile shall contain the following data that is provided upon creation of a Registered Guest user account, and is NOT editable:
 - 1.1.1.First Name
 - 1.1.2.Last Name
 - 1.1.3.Email Address
 - 1.2. The user may also optionally provide the following editable information which is not required and may be edited at any time:
 - 1.2.1.Company Name
 - 1.2.2.Address Line 1
 - 1.2.3.Address Line 2
 - 1.2.4.City
 - 1.2.5.State
 - 1.2.6.Zip Code
 - 1.2.7.Telephone Number

2. System must provide a means by which a Registered Guest can edit and save the editable data in their own Account Profile.
 - 2.1. System must allow user to cancel the Edit Account Profile action so that any changes made are not saved.

Related GUI Elements

My Account Menu

Edit Profile View

UC15: Manage Applications

Goal

Enable a *Registered Guest* to access previously saved incomplete *applications* for continued editing, determine the status of existing *online applications* that have been submitted, and delete previously saved incomplete applications that are no longer needed.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

Edit an Incomplete Application

1. User clicks the “My Applications” menu item in the My Account Menu.
2. System presents the Manage Applications View containing a list of previously saved incomplete or submitted applications, along with their statuses.
3. User clicks the “Continue Editing” button next to an incomplete application.
4. System responds by initiating the Create/Edit an Application use case.

Alternate Flows

A1 – Determine the Status of an Application

1. User clicks the “My Applications” menu item in the My Account Menu.
2. System presents the Manage Applications View containing a list of previously saved incomplete or submitted applications, along with their statuses.
3. User observes the status of an application.

A2 – Delete an Incomplete Application

1. User clicks the “My Applications” menu item in the My Account Menu.
2. System presents the Manage Applications View containing a list of previously saved incomplete or submitted applications, along with their statuses.
3. User clicks the “Delete” button next to an incomplete application.
4. System prompts user to confirm their intention to delete the application.
5. System deletes the application then presents a refreshed Manage Applications View. The deleted application no longer appears in the list of applications.

Post-conditions

None

Requirements

1. System must implement a Manage Applications View containing a list of the user’s previously saved incomplete applications and submitted online applications, along with their statuses.
 - 1.1. System shall present the following information for each application:
 - 1.1.1. Application Description containing the *instrument* name
 - 1.1.2. Date Last Modified
 - 1.1.3. Application Status

- 1.2. System shall support the following statuses: Incomplete, Pending, Approved, Declined.
 - 1.2.1. "Incomplete" status is defined as an application that has not been submitted electronically.
 - 1.2.2. "Pending" status is defined as an application that has been submitted electronically, and is has not been approved or declined.
 - 1.2.3. "Approved" status is defined as an application that has been marked as approved by an Agent via the HPC Management Portal.
 - 1.2.4. "Declined" status is defined as an application that has been marked as declined by an Agent via the HPC Management Portal.
2. System must implement a feature that enables a Registered Guest to edit a previously saved incomplete application.
 - 2.1. System shall enforce that only applications having a status of "Incomplete" may be edited.
3. System must implement a feature that enables a Registered Guest to delete previously saved incomplete applications that are no longer needed.
 - 3.1. System shall enforce that only applications having a status of "Incomplete" may be deleted.
 - 3.2. System shall prompt user to confirm their intention to delete an application before it is deleted.

Related GUI Elements

My Account Menu

Manage Applications View

Edit Application View

UC16: Manage Application Attachments

Goal

Enable a *Registered Guest* to attach files to an *application*, view files attached to an application, download and delete files previously attached to an application.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

Attach a File to an Application

1. User clicks the “Attachments” button while viewing an application in the Edit Application View.
2. System presents the Manage Attachments View, having a list of existing attachments, if any, along with links to “Download” and “Delete” individual attachments and an “Add Attachment” button that enables the user to select a file to attach from their local hard drive.
3. User clicks “Add Attachment” button.
4. System presents the Attach File Dialog.
5. User navigates to and selects the desired file on their local hard drive and clicks “OK”
6. System presents the Manage Attachments View, refreshed to show the file in the list of attachments.

Alternate Flows

A1 – View Attachments

1. User clicks the “Attachments” button while viewing an application in the Edit Application View.
2. System presents the Manage Attachments View, having a list of existing attachments, if any, along with links to “Download” and “Delete” individual attachments and an “Add Attachment” button.

A2 – Download an Attachment

1. User clicks the “Attachments” button while viewing an application in the Edit Application View.
2. System presents the Manage Attachments View, having a list of existing attachments, if any, along with links to “Download Attachment” and “Delete Attachment” and an “Add Attachment” button.
3. User clicks the “Download Attachment” link.
4. System presents the Save As Dialog Box.
5. User provides a file name and selects a destination on their local hard drive and clicks “OK”.
6. File is downloaded and saved to user’s local hard drive.

A3 – Delete an Attachment

1. User clicks the “Attachments” button while viewing an *application* in the Edit Application View.
2. System presents the Manage Attachments View, having a list of existing attachments, if any, along with links to “Download” and “Delete” individual attachments and an “Add Attachment” button.

3. User clicks the “Delete Attachment” link.
4. System prompts user to confirm their intention to delete the attachment.
5. User confirms their intention to delete the attachment.
6. System deletes the attachment then presents the Manage Attachments View, refreshed to show the updated list of attachments that does not include the deleted attachment.

Post-conditions

None

Requirements

1. System must implement a feature that enables Registered Guest users to manage attachments to applications as follows:
 - 1.1. System must enable user to attach one or more files to an application by selecting and uploading files from their local hard drive.
 - 1.1.1. System must allow user to enter an optional comment that describes the purpose of the uploaded file.
 - 1.1.2. System must enforce file type restrictions; only the following file formats shall be allowed:
 - 1.1.2.1. GIF
 - 1.1.2.2. JPEG
 - 1.1.2.3. TIF
 - 1.1.2.4. PNG
 - 1.1.2.5. PDF
 - 1.1.3. System must enforce a maximum allowable file size for upload.
 - 1.1.3.1. The maximum allowable file size shall be 10 MB.
 - 1.1.4. System must scan uploaded files to test for the presence of malicious executable code.
 - 1.1.4.1. System must disallow uploading of any attachments in which malicious executable code is detected.
 - 1.1.5. System must enforce a maximum allowable attachments limit.
 - 1.1.5.1. The maximum allowable attachments limit for any single application shall be 15 attachments.
 - 1.2. System must enable user to view a list of the files that are attached to an application.
 - 1.3. System must enable user to download individual attachments to their local hard drive.
 - 1.4. System must enable user to delete individual files that are attached to an application.
 - 1.4.1. Before deleting any attached file, System shall prompt user to confirm their intention to delete the file.

Related GUI Elements

Edit Application View

Manage Attachments View

Attach File Dialog

UC17: Manage Bookmarks

Goal

Enable a *Registered Guest* to view *bookmarks*, delete bookmarks, and recall *instruments* referenced by bookmarks.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

Recall a Bookmarked Instrument

1. User clicks the “My Bookmarks” menu item in the My Account Menu.
2. System presents the Manage Bookmarks View containing a list of all existing bookmarks that are identified by the name of the instrument they reference.
3. User clicks on the name of a bookmark.
4. System presents the Instrument Home View for the instrument referenced by the bookmark.

Alternate Flows

A1 – View All Bookmarks

1. User clicks the “My Bookmarks” menu item in the My Account Menu.
2. System presents the Manage Bookmarks View containing a list of all existing bookmarks that are identified by the name of the instrument they reference.

A2 – Delete a Bookmark

1. User clicks the “My Bookmarks” menu item in the My Account Menu.
2. System presents the Manage Bookmarks View containing a list of all existing bookmarks that are identified by the name of the instrument they reference.
3. User clicks the “Delete” link next to the bookmark they wish to delete.
4. System prompts user to confirm their intention to delete the bookmark.
5. User confirms their intention.
6. System deletes the bookmark.

Post-conditions

None

Requirements

1. System must implement a feature that enables a Registered Guest to manage bookmarks as follows:
 - 1.1. System must verify that user is authenticated as a Registered Guest.
 - 1.2. System must implement a Manage Bookmarks View that presents a list of all bookmarks created by the user.
 - 1.2.1. Bookmarks shall be identified by the name of the instruments they reference.
 - 1.2.2. Bookmarks shall be listed in ascending alphabetical order.
 - 1.3. System must provide a means by which the user can delete individual bookmarks.
 - 1.3.1. System must prompt user to confirm their intention to delete a bookmark before deleting it.

1.4. System must provide a means by which the user can recall a bookmarked instrument by clicking on a listed bookmark in the Manage Bookmarks View.

1.4.1. Clicking a bookmark shall navigate to the Instrument Home View for the instrument referenced by the bookmark.

Related GUI Elements

Manage Bookmarks View

Instrument Home View

UC18: Manage Online Applications Received

Goal

Enable an *Agent* to view, print, and update the status of *online applications* that have been received.

Actors

Agent

Pre-conditions

User is authenticated as an Agent.

Basic Flow

View an Application

1. Agent clicks the Manage Applications Icon in the Agent Dashboard View.
2. System presents the Find Application View showing a list of online applications received. Each application is identified by an *Application Reference Number (ARN)*, the submitting user's name and the name of the *instrument* that is being applied for, and includes the date it was received, and its status. There is an option to filter applications based on their status, a search form to search for applications using all or part of the ARN, submitting user's name or email address.
3. Agent finds the desired application by browsing the list, filtering the list, or by entering all or part of a searchable value in the search form.
4. Agent clicks the ARN of an application.
5. System presents the Manage Single Application View which displays the application data submitted by the submitting user in read-only form on a single screen, along with a simple form for setting application status, and a list of attachments, if any, as links to the attachments.

Alternate Flows

A1 – Print an Application

1. While viewing an application in the Manage Single Application View, user clicks the “View in Printable Format” link.
2. System generates a PDF file containing the application data.
3. System presents the PDF file in the View as PDF Screen in a new window.
4. User clicks the Acrobat Reader Print Icon.
5. Adobe Acrobat Reader presents the Print Dialog Box.
6. User selects desired print options, and clicks “Print”.
7. Application PDF file is printed on user's local printer.

A2 – View an Attachment

1. While viewing an application in the Manage Single Application View, user clicks on the name of an attachment.
2. System generates a PDF version of the attachment.
3. System presents the PDF file in the View as PDF Screen in a new window.

A3 – Print an Attachment

1. While viewing an attachment in the View as PDF Screen, user clicks the Acrobat Reader Print Icon.

2. Adobe Acrobat Reader presents the Print Dialog Box.
3. User selects desired print options, and clicks "Print".
4. Attachment PDF file is printed on user's local printer.

A4 – Download an Attachment

1. While viewing an attachment in the View as PDF Screen, user clicks the Acrobat Reader Save Icon.
2. System presents the Save As Dialog Box.
3. User provides a file name and selects a destination on their local hard drive and clicks "OK".
4. File is downloaded and saved to user's local hard drive.

A5 – Update Status of an Application

1. While viewing an application in the Manage Single Application View, user sets the status by selecting a value from the Status Form, and clicks "Save".
2. System presents a message to notify user the status has been successfully updated.

Post-conditions

None

Requirements

- 1.0 System must implement a feature that enables an Agent to manage online applications that have been received:
 - 1.1 System must verify that user is authenticated as an Agent.
 - 1.2 System shall provide a list of online applications that have been received.
 - 1.2.1 The list shall be filtered by department to include only applications for instruments that Agent has review authority over.
 - 1.2.2 The list shall be presented as a table that includes the following columns:
 - 1.2.2.1 Application Reference Number (ARN)
 - 1.2.2.2 Submitting user's name
 - 1.2.2.3 Name of the instrument being applied for
 - 1.2.2.4 Date the application was received
 - 1.2.2.5 Status of application
 - 1.2.3 Each column of the table shall be sortable.
 - 1.2.4 System must enable Agent to filter the list by Status
 - 1.3 System must implement a feature that enables Agent to quickly find a specific application by entering all or part of any of the following values in a search form:
 - 1.3.1 ARN
 - 1.3.2 Submitting user's name
 - 1.3.3 Submitting user's email address
 - 1.4 System must implement a feature that enables an Agent to view individual online applications.
 - 1.4.1 The feature must enable the Agent to select and view a single application.
 - 1.4.2 The application data shall be presented in a single screen.
 - 1.4.3 The application data shall be presented in a read-only manner to prevent accidental editing of the data.
 - 1.5 System must provide a means by which Agent can print an individual application.
 - 1.6 System must provide a means by which Agent can view a list of attachments to an application, if any.

- 1.7 System must provide a means by which Agent can view individual attachments.
- 1.8 System must provide a means by which Agent can print individual attachments.
- 1.9 System must provide a means by which Agent can update the status of an application.

Related GUI Elements

Agent Dashboard View
Manage Applications Icon
Find Application View
Manage Single Application View
View in Printable/Downloadable Format Link
View as PDF Screen
Adobe Acrobat Reader Print Icon
Adobe Acrobat Reader Save Icon
Print Dialog Box
Save As Dialog Box

UC19: Manage Online Forms

Goal

Enable a *CMS Administrator* to create and publish online forms, edit existing online forms, and delete previously created online forms that are no longer required.

Actors

CMS Administrator

Pre-conditions

User is authenticated as a CMS Administrator

Basic Flow

Create and Publish an Online Form

1. CMS Administrator launches Form Manager View.
2. CMS Administrator creates a new form by launching the Form Editor View.
3. CMS Administrator provides a name for the form, then selects form controls from a palette of available controls.
4. CMS Administrator defines the nature, limits, and values for any field level data validation that is required.
5. CMS Administrator edits and configures end-user messages for on-screen and email confirmations, if any.
6. CMS Administrator edits and configures internal email notifications, if any.
7. CMS Administrator maps form fields to database(s) as required.
8. CMS Administrator publishes the form to make it live on the HPC Portal Site.

Alternate Flows

A1 – Edit Existing Online Form

1. CMS Administrator launches Form Manager View.
2. CMS launches the Form Editor View to modify an existing form.
3. CMS Administrator edits the existing form modifying form controls, field level data validation rules, end-user messages for on-screen and email confirmations, internal email notifications, and/or database mappings, as required.
4. CMS Administrator publishes the changes to make them live on the HPC Portal Site.

A2 – Delete an Online Form

1. CMS Administrator launches Form Manager View.
2. CMS Administrator clicks a “Delete” button next to the name of the form they wish to delete.
3. System prompts CMS Administrator to confirm their intention to delete the form.
4. CMS Administrator confirms.
5. System deletes the form.

Post-conditions

None

Requirements

1.0 System must implement a Manage Online Forms feature as follows:

- 1.1 System must verify that user is authenticated as a CMS Administrator
- 1.2 System must implement a Form Manager View in which CMS Administrator can view a list of all existing online forms.
- 1.3 System must provide a Form Editor that enables CMS Administrator to create and publish online forms.
 - 1.3.1 System must enable CMS Administrator to select form controls from a palette of available controls.
 - 1.3.2 System must enable CMS Administrator to define the type, limits, and values of any field-level data validation that is required.
 - 1.3.3 System must enable CMS Administrator to edit and configure end-user messages for both on-screen and email confirmations.
 - 1.3.4 System must enable CMS Administrator to edit and configure internal email notifications.
 - 1.3.5 System must enable CMS Administrator to map form fields to fields in the CMS database, or other databases.
 - 1.3.6 System must enable CMS Administrator to publish or unpublish forms to add or remove them from the HPC Portal Site when needed.
 - 1.3.7 System must enable CMS Administrator to edit existing online forms.
 - 1.3.8 System must enable CMS Administrator to delete online forms that are no longer needed.

Related GUI Elements

Form Manager View

Form Editor View

UC20: Manage Taxonomy & Thesaurus

Goal

Enable a *Content Manager* to create and edit a controlled vocabulary of terms that organizes *instruments* and their related content into categories and to edit metadata about terms in the *taxonomy* to include, as necessary, alternative terms and pointers to related terms. The resulting taxonomy is employed in the implementation of a browseable index of content to support the Browse Content by Taxonomy *use case*. The resulting *thesaurus* is employed in the implementation of a search engine index of content to support the Search Content by Keyword *use case*.

Actors

Content Manager

Pre-conditions

User is authenticated as a Content Manager.

Basic Flow

1. Content Manager launches the Manage Taxonomy/Thesaurus View from the Content Manager Dashboard.
2. System presents a list of existing terms, if any.
3. Content Manager navigates to the level of the taxonomy where they wish to add a new term.
4. Content Manager adds a new term, then adds narrower terms (NT) if desired.
5. Content Manager adds related terms (RT) and non-preferred terms (NPT), if any.

Alternate Flows

None

Post-conditions

None

Requirements

1. System must implement a feature that enables a Content Manager to create and edit a controlled vocabulary of terms (the taxonomy) that organizes instruments and their related content into categories, and to edit metadata about terms in the taxonomy to include, as necessary, alternative terms and pointers to related terms.
 - 1.1. System must provide support for the management of the following five principal relations or functions between thesaurus terms, as defined by standard ISO 2788:
 - 1.1.1. USE = use
 - 1.1.2. UF = use for
 - 1.1.3. BT = broader term
 - 1.1.4. NT = narrower term
 - 1.1.5. RT = related term

Related GUI Elements

Manage Taxonomy/Thesaurus View
Content Manager Dashboard

UC21: Manage User Accounts

Goal

Enable a *CMS Administrator* to create, enable, disable, and delete *user accounts*.

Actors

CMS Administrator

Pre-conditions

User is authenticated as a CMS Administrator

Basic Flow

Create a New User Account

1. CMS Administrator launches the User Manager View from the CMS Administrator Dashboard.
2. CMS Administrator creates a new user account by providing a user name, initial password, and email address.
3. CMS Administrator assigns user roles to the new user by selecting from one or more groups per-defined groups/roles (Guest, Registered Guest, Agent, Content Manager, CMS Administrator).
4. CMS Administrator saves the new user account.

Alternate Flows

A1 – Enable/Disable a User Account

1. CMS Administrator launches the User Manager View from the CMS Administrator Dashboard.
2. CMS Administrator selects a user account from a list of existing accounts.
3. CMS Administrator sets an enabled account to disabled state (or alternately sets a disabled account to enabled state).

A2 – Delete a User Account

1. CMS Administrator launches the User Manager View from the CMS Administrator Dashboard.
2. CMS Administrator selects a user account from a list of existing accounts.
3. CMS Administrator clicks “Delete Account”.
4. System prompts user to confirm their intention to delete the account.
5. CMS Administrator affirms their intention to delete the account.
6. System deletes the user account.

Post-conditions

None

Requirements

1. System must implement a User Manager feature that enables a CMS Administrator to manage user accounts.
 - 1.1. System must verify that user is authenticated as a CMS Administrator before allowing access to the User Manager feature.
 - 1.2. System must provide a means by which CMS Administrator can create new user accounts.
 - 1.2.1. User accounts shall employ a user’s email address as their user name.
 - 1.2.2. User accounts must include the following data:
 - 1.2.2.1. User’s first name

- 1.2.2.2. User's last name
- 1.2.2.3. User's email address
- 1.2.2.4. User's password
- 1.3. System must provide a means by which CMS Administrator can disable user accounts.
 - 1.3.1. System must provide a means by which CMS Administrator can re-enable user accounts that have been disabled.
- 1.4. System must provide a means by which CMS Administrator can delete user accounts.
- 1.5. System must support the specification of user groups/roles for access control purposes.
 - 1.5.1. System must implement the following user groups/roles:
 - 1.5.1.1. Guest
 - 1.5.1.2. Registered Guest
 - 1.5.1.3. Agent
 - 1.5.1.4. Content Manager
 - 1.5.1.5. CMS Administrator
 - 1.5.1.6. An undetermined number of additional groups that associate an Agent or Content Manager with one or more departments for whom they have application review or content management authority.
- 1.6. System must enforce minimum password strength rules definable by CMS Administrator.
- 1.7. System must implement a self-service lost password recovery feature that provides a means by which a user can recover a lost password without the intervention of a CMS Administrator.

Related GUI Elements

CMS Administrator Dashboard
User Manager View

UC22: Manage User Surveys

Goal

Enable a *CMS Administrator* to create, publish, edit, and delete simple user surveys, and view a summary report of the results of surveys published.

Actors

CMS Administrator

Pre-conditions

User is authenticated as a CMS Administrator.

Basic Flow

Create & Publish a User Survey

1. CMS Administrator launches the Survey Manager View from the CMS Administrator Dashboard.
2. CMS Administrator creates a new user survey.
3. System presents the Survey Editor View.
4. CMS Administrator provides a name for the new user survey.
5. CMS Administrator adds questions to the user survey by selecting and configuring desired question/control types from a palette of available controls.
6. CMS Administrator saves the new user survey.

Alternate Flows

A1 – Edit Existing User Survey

1. CMS Administrator launches the Survey Manager View from the CMS Administrator Dashboard.
2. System presents a list of existing user surveys.
3. CMS Administrator selects an existing user survey to edit.
4. System presents the selected user survey in the Survey Editor View.

A2 – Delete a User Survey

1. CMS Administrator launches the Survey Manager View from the CMS Administrator Dashboard.
2. System presents a list of existing user surveys.
3. CMS Administrator selects an existing user survey and clicks “Delete”.
4. System prompts CMS Administrator to confirm their intention to delete the user survey.
5. CMS Administrator confirms intention to delete the user survey.
6. System deletes the user survey and refreshes the list of existing user surveys that now does not contain the deleted user survey.

A3 – View Results of a Survey

1. CMS Administrator launches the Survey Manager View from the CMS Administrator Dashboard.
2. System presents a list of existing user surveys.
3. CMS Administrator selects an existing user survey and clicks “View Results”.
4. System presents the Survey Results View for the selected user survey.

Post-conditions

None

Requirements

1. System must implement a Survey Manager feature as follows:
 - 1.1. System must verify that user is authenticated as a CMS Administrator before allowing access to the Survey Manager feature.
 - 1.2. System must provide a means by which CMS Administrator can create new users surveys using an editor by choosing question types from a palette of pre-defined types.
 - 1.3. System must provide a means by which CMS Administrator can edit and existing user survey
 - 1.4. System must provide a means by which CMS Administrator can publish or unpublish existing user surveys to add or remove them from the HPC Portal website.
 - 1.5. System must provide a means by which CMS Administrator can delete existing user surveys.
 - 1.6. System must provide a means by which CMS Administrator can view a summary report of the results of a user survey.

Related GUI Elements

CMS Administrator Dashboard

Survey Manager View

Survey Editor View

Survey Results View

UC23: Schedule an Event

Goal

Enable a *Registered Guest* to schedule an event of a pre-defined type involving a pre-defined schedulable *resource*.

Actors

Registered Guest
HPC Scheduler System

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

1. Registered Guest initiates the use case by clicking “Schedule” in the HPC Main Navigation Menu.
2. System redirects user to the “Home” page of the HPC Scheduler System, a separate system that is external to the HPC Portal System.
3. The use case ends.

Alternate Flows

None

Post-conditions

None

Requirements

1. System must provide a link to the HPC Scheduler System to enable Registered Guest users to schedule events involving schedulable resources.
 - 1.1. The link shall be a simple link from the “Schedule” item in the HPC Main Navigation Menu to the URL of the HPC Scheduler System “Home” page.

Related GUI Elements

HPC Main Navigation Menu
Schedule Event View

UC24: Search Content by Keyword

Goal

Enable a *Guest* user to quickly locate and navigate to content of interest by submitting keywords to a search engine.

Actors

Guest

Pre-conditions

None

Basic Flow

1. A Guest user initiates the use case by entering one or more keywords into the Keyword Search Form and clicking the accompanying search button.
2. System responds by presenting the Search Results View that contains a list of results. Among the results are not just those that matched the submitted keyword(s) exactly, but also those that are related to the submitted terms as defined by Related Terms (RTs) and Non-Preferred Terms (NPTs) in the *thesaurus*. Results are presented as a page title that is a hyperlink to the page it references.
3. Guest browses the results and ultimately selects one by clicking on its title.
4. System responds by navigating to the content that is referenced by the link in the search results.

Alternate Flows

None

Post-conditions

None

Requirements

1. System must implement a Search Content by Keyword feature as follows:
 - 1.1. System must implement a search engine that indexes all indexable content in the HPC Portal website.
 - 1.2. Search engine must suggest search results based on both exact match results and related terms as follows:
 - 1.2.1. Search engine must suggest search results in which an exact match for the submitted search term(s) is found.
 - 1.2.2. Search engine must employ the thesaurus to suggest search results based on Related Terms (RTs) and Non-Preferred Terms (NPTs) that may be different but still related to the keywords entered by the user.

Related GUI Elements

Keyword Search Form

Search Results View

UC25: Submit an Electronic Signature

Goal

Enable a Registered User to provide an *electronic signature* as part of an *online application*.

Actors

Registered Guest

E-Signature Processing System

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

1. The use case is initiated by HPC Portal System upon submission of an online application by a Registered Guest in the [Submit an Online Application](#) use case.
2. The HPC Portal System redirects the Registered Guest to the E-Signature Processing System, an external system that is hosted by a third-party E-Signature Processor.
3. The E-Signature Processing System responds by presenting signature instructions to Registered Guest, and facilitating the online signature process according to their practice, then on completion of the signature process, redirects Registered Guest back to the HPC Portal System to complete the Submit an Online Application use case.

Alternate Flows

None

Post-conditions

None

Requirements

1. System shall be integrated with an as-yet unidentified third party E-Signature Processing System.
2. System shall initiate that system's electronic signature process upon submission by a Registered Guest of any application requiring a signature.
3. To ensure legal validity of electronic signatures, implementation of the electronic signature process shall be compliant with relevant provisions of the U.S Electronic Signatures in Global and National Commerce Act (ESIGN) and the Uniform Electronic Transactions Act (UETA).

Related GUI Elements

None

UC26: Submit an Online Application

Goal

Enable a *Registered Guest* to submit an *application* electronically.

Actors

Registered Guest

Pre-conditions

1. User is authenticated as a Registered Guest
2. *Instrument* application is eligible for online submission.

Basic Flow

1. The use case is initiated when a Registered Guest clicks the “Submit Now” button from the Edit Application View in the Create/Edit an Application use case.
2. HPC Portal System validates the data submitted by Registered Guest and if any of the information submitted fails validation tests, then HPC Portal System notifies the Registered Guest and requires them to resubmit with corrected information.
3. If an electronic signature is required, HPC Portal System initiates the Submit an Electronic Signature use case.
4. Upon completion of the Submit an Electronic Signature use case, and successful submission of the completed online application form with valid data, HPC Portal System responds by presenting a system message to the Registered Guest informing them of successful submission of their online application.

Alternate Flows

None

Post-conditions

None

Requirements

1. System must implement a Submit Online Application feature as follows:
 - 1.1. System must verify that user is authenticated as a Registered Guest.
 - 1.2. System shall maintain information about whether each instrument is or is not eligible for online application.
 - 1.3. System must verify that instrument application is eligible for online submission, as not all instrument applications are.
 - 1.4. For every instrument that is eligible for online application, System shall maintain a unique online form.
 - 1.4.1. System shall enable a Registered Guest to submit an eligible application electronically by completing and submitting the online form containing the information required for the application process.
 - 1.4.2. System must support multi-page forms.
 - 1.4.3. System must support the use of all of the following field types in an online form:
 - 1.4.3.1. Simple Text
 - 1.4.3.2. Large Text Area
 - 1.4.3.3. Radio Button

- 1.4.3.4. Checkbox
- 1.4.4. System must incorporate the use of a CAPTCHA-style challenge mechanism to prevent SPAM by ensuring that forms are submitted by human users.
- 1.4.5. System must enforce the following types of field-level validation rules:
 - 1.4.5.1. Required fields
 - 1.4.5.2. Correctly formatted email addresses
 - 1.4.5.3. Correctly formatted telephone numbers
 - 1.4.5.4. Numeric only values
 - 1.4.5.5. Alphanumeric only values
 - 1.4.5.6. Character masks
- 1.4.6. When validation fails, System shall indicate why and provide a message that guides the user to correct resolution.
- 1.5. When online signature is required with an application, System must initiate the Submit an Electronic Signature use case.

Related GUI Elements

Instrument Home View

Online Application Form View

UC27: Submit an Online Payment

Goal

Enable a *Registered Guest* to submit a payment online, when required, to accompany an *online application*.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest
Instrument requires payment

Basic Flow

1. The use case is initiated by HPC Portal System when payment is required upon submission of an online application by a Registered Guest in the Submit an Online Application use case.
2. The HPC Portal System redirects the Registered Guest to the Payment Processing System, an external system that is hosted by a third-party Online Payment Processor.
3. The Payment Processing System responds by presenting payment instructions to Registered Guest, and facilitating the online payment process according to their practice. On successful completion of the payment process, the Payment Processing System redirects Registered Guest back to the HPC Portal System to complete the Submit an Online Application use case.

Alternate Flows

None

Post-conditions

None

Requirements

1. System must implement a feature that enables a Registered Guest to submit a payment online, when required, to accompany an online application as follows:
 - 1.1. System must maintain for each instrument, an indicator of whether the instrument requires payment.
 - 1.2. System must integrate with the third-party payment processing service of Chase Bank and their Merchant Service API.
 - 1.3. Upon successful submission of an online application for an instrument that requires payment, System shall redirect Registered Guest to the third-part payment process to complete the payment transaction.
2. System implementation must meet requirements of Payment Card Industry (PCI) Data Security Standard and must be certifiable following audit by a Payment Application Qualified Security Assessor (PA-QSA) as PCI compliant.

Related GUI Elements

None

UC28: View Instrument Home

Goal

Enable a *Guest* to view all content related to a specific *instrument* and to perform key actions associated with the instrument in a single place.

Actors

Guest

Pre-conditions

None

Basic Flow

1. A Guest initiates the use case by clicking a hyperlink to a particular instrument in the Wizard Results View, the Search Results View, or the Browse Content by Taxonomy View.
2. HPC Portal System responds by presenting the Instrument Home View that is a one-place hub for information and actions related to the instrument of interest. The Instrument Home View provides easy access to an overview of information about the instrument, FAQs related to the instrument, tools to apply and renew online, tools to schedule inspections or other events related to the instrument, and contact information for individuals or departments who can assist with matters related to the instrument.

Alternate Flows

None

Post-conditions

None

Requirements

1. System must implement a View Instrument Home feature that enables a Guest to view all content related to a specific instrument and to perform key actions associated with the instrument in a single place as follows:
 - 1.1. For each instrument, System shall implement an Overview page containing the following standard information:
 - 1.1.1. Instrument Name
 - 1.1.2. Instrument Description
 - 1.1.3. Quick Facts Summary, including:
 - 1.1.3.1. Instrument Type
 - 1.1.3.2. Period of instrument's validity
 - 1.1.3.3. Whether inspection is required
 - 1.1.3.4. Whether renewal is required
 - 1.1.3.5. Summary of Fees, including:
 - 1.1.3.5.1. Original Cost
 - 1.1.3.5.2. Administrative Fee
 - 1.1.3.5.3. Late Fee
 - 1.1.3.5.4. Renewal Cost
 - 1.1.4. A detailed explanation of the application and/or renewal process.
 - 1.1.5. A detailed explanation of any variations or exceptions in the instrument requirements or in the application and/or renewal processes.

- 1.1.6.A detailed explanation of inspection requirements, if any.
- 1.1.7.A reference to the statutory authority for the instrument
 - 1.1.7.1. If the statute that authorizes the instrument is available online, the statutory authority reference shall be linked to the actual statute.
- 1.2. For each instrument, System shall present a collection of Frequently Asked Questions that are related to the instrument.
 - 1.2.1.System shall maintain collections of FAQs for each instrument.
 - 1.2.2.System shall present FAQs in a categorized presentation when there are many FAQs related to an instrument.
- 1.3. For each instrument, System shall present an “Apply/Renew” page that explains in detail the application and/or renewal processes.
 - 1.3.1.If instrument is eligible for online application, then System shall provide a link to the online application form.
 - 1.3.2.System shall present links to downloadable application forms for offline application.
 - 1.3.3.System shall present links to related downloadable document, if any.
- 1.4. For each instrument, System shall present a “Schedule” page that explains in detail how to schedule inspections or other events related to the instrument.
 - 1.4.1.If event can be scheduled online, System shall provide a link to the HPC Scheduler System.
 - 1.4.1.1. When link is provided to the HPC Scheduler System, link shall be a deep link that navigates directly to the page where user can schedule the inspection or event without requiring additional navigation.
- 1.5. For each instrument, System shall present a “Contact” page that includes all relevant contact information related to the instrument.

Related GUI Elements

Wizard Results View

Search Results View

Browse Content by Taxonomy

Instrument Home View

UC29: Save Wizard Scenario

Goal

Enable a *Registered Guest* to save the in-process but incomplete data set provided by them through their interaction with the *wizard* so they can resume and ultimately complete the interaction at a later time.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

1. Registered Guest initiates the use case by clicking the Save Scenario Button at the bottom of any page in Wizard Scenario View.
2. The HPC Portal System presents the Save Wizard Scenario View, prompting Registered Guest to enter a descriptive name for the scenario.
3. Registered Guest enters a descriptive name for the scenario and clicks "Save".
4. The HPC Portal System saves the collection of scenario data already entered by the user and notifies the user of successful completion of the operation.

Alternate Flows

A1 – Scenario Name Is Not Unique

1. Registered Guest enters a descriptive name for the scenario that has already been used, and clicks "Save".
2. HPC Portal System does not save the scenario.
3. HPC System notifies the user that a scenario of that name already exists and prompts the user to enter a unique name.

Post-conditions

Wizard Scenario is saved in database and associated with the user's account.

Requirements

1. The System must implement a feature that provides the capability for a Registered Guest User to Save a Wizard Scenario as follows:
 - 1.1. System must verify that user is authenticated as a Registered Guest.
 - 1.2. System must allow for saving up to 20 unique scenarios.
 - 1.3. System must validate scenario name and enforce that only unique scenario names are allowed.
 - 1.4. The feature must save the in-process but incomplete data set provided by the user through their interaction with the wizard so they can resume and ultimately complete the interaction at a later time.

Related GUI Elements

Wizard Scenario View

Save Scenario Button

Save Wizard Scenario View

UC30: Change Password

Goal

Enable a *Registered Guest* user to change their existing password.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

1. A Registered Guest user initiates the use case by clicking the “Change Password” menu item in the My Account Menu.
2. The HPC Portal System presents the Edit Password View having a field for entry of the current password, and two fields for entry and verification of a new password.
3. Registered Guest enters their current password, and enters a new password twice then clicks “Save”.
4. The HPC Portal System verifies that the current password is correct, and that the new password matches in both fields. If all validates correctly, the System saves the new password and presents a system message informing the user that their password was successfully updated.

Alternate Flows

A1 – Incorrect Current Password

1. If the current password entered by the user doesn't match the user's current password, the HPC Portal System does not save the new password, and instead presents a system message that informs the user that the current password entered was incorrect, then prompts the user to try again.

A2 – New Passwords Don't Match

1. If the new passwords entered by the user don't match, the HPC Portal System does not save the new password, and instead presents a system message that informs the user that the new passwords entered did not match, then prompts the user to try again.

Post-conditions

None

Requirements

1. System must implement a feature that enables a Registered Guest user to change their existing password.
 - 1.1. System must verify that user is authenticated as a Registered Guest.
 - 1.2. System must require user to enter the correct existing password before allowing them to change their password.
 - 1.3. System must require double entry of the desired new password.
 - 1.4. System must validate the password entered as follows:
 - 1.4.1. Both instances of the password entry must match.
 - 1.4.2. Password must meet the following criteria:
 - 1.4.2.1. Minimum length of 8 characters
 - 1.4.2.2. Must contain mix of uppercase and lowercase characters

- 1.4.2.3. Must contain at least 1 number
- 1.4.2.4. Must not contain any portion of the User ID

Related GUI Elements

My Account Menu
Edit Password View

UC31: Create/Edit an Application

Goal

Enable a *Registered Guest* to create a new *application* and edit existing applications that have not been submitted.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

Create & Submit a New Application

1. A Registered Guest initiates the use case by clicking the “Apply Now” button on the Apply/Renew page of the Instrument Home View for a particular *instrument* of interest.
2. HPC Portal System responds by presenting the Edit Application View (an online form) for the instrument application.
3. Registered Guest enters data in the provided fields and submits the completed form by clicking the “Submit Now” button, thereby initiating the Submit an Online Application use case.

Alternate Flows

A1 – Create & Save a New Application

1. A Registered Guest initiates the use case by clicking the “Apply Now” button on the Apply/Renew page of the Instrument Home View for a particular instrument of interest.
2. HPC Portal System responds by presenting the Edit Application View (an online form) for the instrument.
3. Registered Guest enters data in the provided fields and saves the form that may or may not be complete by clicking the “Save & Finish Later” button.
4. HPC Portal System responds by validating and then saving the data submitted by the user, and presents the Manage Applications View containing a list of previously saved incomplete or submitted applications, along with their statuses. The list now contains an entry for the newly saved application, and a system message confirms success of the operation.

A2 – Edit & Submit an Existing Application

1. A Registered Guest initiates the use case by clicking the “Continue Editing” button next to an existing application in the Manage Applications View.
2. HPC Portal System responds by presenting the Edit Application View (an online form), pre-populated with data previously entered by the user.
3. Registered Guest enters data in the provided fields and submits the completed form by clicking the “Submit Now” button, thereby initiating the Submit an Online Application use case.

A3 – Edit & Save an Existing Application

1. A Registered Guest initiates the use case by clicking the “Continue Editing” button next to an existing application in the Manage Applications View.

2. HPC Portal System responds by presenting the Edit Application View (an online form), pre-populated with data previously entered by the user.
3. Registered Guest enters data in the provided fields and saves the form that may or may not be complete by clicking the “Save & Finish Later” button.
4. HPC Portal System responds by presenting the Manage Applications View containing a list of previously saved incomplete or submitted *applications*, along with their statuses. The list now contains an entry for the newly saved application, and a system message confirms success of the operation.

Post-conditions

None

Requirements

1. System must implement a feature that enables a Registered Guest to create and edit applications online.
 - 1.1. System must verify that user is authenticated as a Registered Guest.
 - 1.2. System must implement instrument applications as editable online forms.
 - 1.3. System must enable the creation of new applications.
 - 1.4. System must support the ability to save an incomplete application for continued editing at a later time.
 - 1.4.1. System shall use the name of the instrument and type of application (new, renewal) to identify incomplete applications.
 - 1.5. System must support the ability to recall an existing incomplete application that was previously saved for continued editing.
 - 1.6. Upon saving or submitting any form, System shall validate data entry according to rules specified by CMS Administrator at the time of each form’s authoring.

Related GUI Elements

Instrument Home View

Edit Application View

Manage Applications View

UC32: Download / Print an Offline Application

Goal

Enable a *Registered Guest* to download or print an *application* and its attachments, if any, for offline use, including for submission as an *offline application*.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

Download an Offline Application

1. While viewing an application in the Edit Application View, user clicks the View in Printable/Downloadable Format Link.
2. System generates a PDF file containing the application form that is pre-filled with the data that has been entered or otherwise provided by the user, and any attachments that have been uploaded by the user.
3. System presents the PDF file in the View as PDF Screen in a new window.
4. User clicks the Acrobat Reader Save Icon.
5. Adobe Acrobat Reader presents the Save As Dialog Box.
6. User selects desired options for saving file, and clicks "Save".
7. Offline application PDF file is saved to user's local hard drive.

Alternate Flows

A1 – Print an Offline Application

4. User clicks the Acrobat Reader Print Icon.
5. Adobe Acrobat Reader presents the Print Dialog Box.
6. User selects desired print options, and clicks "Print".
7. Offline application PDF file is printed on user's local printer.

Post-conditions

None

Requirements

1. System must provide a feature that enables a Registered Guest to download or print an application and its attachments, if any, for offline use, including for submission as an offline application.
 - 1.1. System must verify that user is authenticated as a Registered Guest.
 - 1.2. System must generate a PDF file that containing the application form that is pre-filled with the data that has been entered or otherwise provided by the user, and any attachments that have been uploaded by the user.
 - 1.3. System must provide a means by which a user can print the PDF file that is generated.
 - 1.4. System must provide a means by which a user can save a copy of the PDF file to their local hard drive.

Related GUI Elements

Edit Application View

View in Printable/Downloadable Format Link

View as PDF Screen

Adobe Acrobat Reader Print Icon

Adobe Acrobat Reader Save Icon

Print Dialog Box

Save As Dialog Box

External Dependencies

Requires Adobe Acrobat Reader installed on user's computer.

UC33: View Related Document

Goal

Enable a Guest to view a *related document* that is related to a particular *instrument* of interest.

Actors

Guest

Pre-conditions

None

Basic Flow

1. A Guest user initiates the use case by clicking on the title of a related document in the Instrument Home View.
2. HPC Portal System presents the Related Document View in a new window.
3. The use case ends.

Alternate Flows

None

Post-conditions

None

Requirements

1. System must implement a feature that enables Guest users to view supplementary documents that are related to a particular instrument of interest to them.
 - 1.1. System must present a list of related documents in the Instrument Home View.
 - 1.2. When user clicks the title of a related document in the Instrument Home View, system shall present the Related Document View in a new browser window.
 - 1.3. System must enable Content Managers to manage related documents in the Management Portal.
 - 1.3.1. System must authenticate user as a valid Content Manager before allowing access to the Manage Related Documents feature of the Management Portal.
 - 1.3.2. System must enable Content Manager to associated related documents with a particular instrument by selecting documents from a collection of all available documents.

Related GUI Elements

Related Document View

External Dependencies

Requires Adobe Acrobat Reader installed on user's computer.

UC34: Manage Wizard Scenarios

Goal

Enable a *Registered Guest* to access previously saved *wizard scenarios* for continued editing, rename an existing wizard scenario, or delete wizard scenarios that are no longer needed.

Actors

Registered Guest

Pre-conditions

User is authenticated as a Registered Guest

Basic Flow

Recall a Wizard Scenario

1. A Registered Guest user initiates the use case by clicking the “My Scenarios” menu item in the My Account Menu.
2. System presents the Manage Wizard Scenarios View containing a list of all existing scenarios.
3. User clicks on the name of a scenario.
4. System presents the Wizard Scenario View for the scenario the user selected.

Alternate Flows

A1 – View All Scenarios

1. User clicks the “My Scenarios” menu item in the My Account Menu.
2. System presents the Manage Wizard Scenarios View containing a list of all existing *scenarios*.
3. The use case ends.

A2 – Delete a Scenario

1. User clicks the “My Scenarios” menu item in the My Account Menu.
2. System presents the Manage Wizard Scenarios View containing a list of all existing *scenarios*.
3. User clicks the “Delete” link next to the *scenario* they wish to delete.
4. System prompts user to confirm their intention to delete the *scenario*.
5. User confirms their intention.
6. System deletes the scenario.
7. The use case ends.

Post-conditions

None

Requirements

1. System must implement a feature that enables a Registered Guest to manage wizard scenarios as follows:
 - 1.1. System must verify that user is authenticated as a Registered Guest.
 - 1.2. System must implement a Manage Wizards Scenario View that presents a list of all scenarios saved by the user.
 - 1.2.1. Scenarios shall be identified by a descriptive label provided by the user.
 - 1.2.2. Scenarios shall be listed in ascending alphabetical order.
 - 1.3. System must provide a means by which the user can delete individual scenarios.
 - 1.3.1. System must prompt user to confirm their intention to delete a scenario before deleting it.
 - 1.4. System must provide a means by which the user can recall a scenario by clicking on a listed scenario label in the Manage Scenarios View.
 - 1.4.1. Clicking a scenario label shall navigate to the Wizard Scenario View which is pre-populated with data for the scenario selected by the user.

Related GUI Elements

Manage Wizard Scenarios View

Wizard Scenario View

UC35: Maintain Wizard

Goal

Enable a *CMS Administrator* to configure and maintain the content and behavior of the *wizard*.

Actors

CMS Administrator

Pre-conditions

User is authenticated as a CMS Administrator

Basic Flow

Configure Wizard Questions

1. CMS Administrator initiates the use case by invoking the Maintain Wizard View from the CMS Administrator Dashboard.
2. HPC Portal System presents the Maintain Wizard View. The view contains a list of all wizard questions presented in table format. Each question is identified by a system assigned unique numerical key, and the full text of the question. Next to each question are columns indicating both the top-level and sub-categories the question is associated with. There is also a column that indicates the sequence number (or order in which the question appears) along with arrow controls to move a question up or down in sequence relative to other questions in the same sub-category. There is a button to toggle each question from active (published) to inactive (unpublished) status.
3. CMS Administrator clicks the "New Question" button to add a new question.
4. System presents the Edit Wizard Question View.
5. CMS Administrator selects the top-level category and the sub-category in which the question should appear, sets its sequence value by selecting from a list the question currently in the position it should occupy upon creation, sets its status (active or inactive). Then, using a WYSIWYG HTML editor, CMS Administrator enters the full text of the question as it should be presented to the user. CMS Administrator adds possible responses to the question, and for each response, selects one or more instruments that would be related based on the response. CMS Administrator saves the new question.
6. System responds by presenting the Maintain Wizard View that is now refreshed to include the new question.

Alternate Flows

A1 – Edit Existing Question

1. CMS Administrator selects a question to edit from the Maintain Wizard View.
2. HPC Portal System responds by presenting the Edit Wizard Question View showing the selected question.
3. CMS Administrator edits the question and its associated meta-data and/or possible responses and the collection of instruments related to them, then saves the changes.

A2 – Delete a Question

1. CMS Administrator selects a question to delete from the Maintain Wizard View, then clicks the Trash button.
2. System responds by moving the selected question to the Trash.

A3 – Edit Categories

1. CMS Administrator invokes the Edit Categories View from the CMS Administrator Dashboard.
2. System responds by presenting the Edit Categories View that contains a list of existing question categories along with the number of questions currently in each. Also is an option to enable (publish) or disable (unpublish) each category.
3. CMS Administrator adds, renames, reorders, or deletes categories.

Post-conditions

None

Requirements

1. System must implement a feature that enables a CMS Administrator to maintain the wizard as follows:
 - 1.1. System must verify that user is authenticated as a CMS Administrator.
 - 1.2. System must implement a Manage Wizard View that presents a list of all wizard questions.
 - 1.2.1. Questions shall be identified by a system generated unique numerical identifier.
 - 1.2.2. System shall provide a means by which CMS Administrator can perform the following actions on existing questions:
 - 1.2.2.1. Enable or disable questions without deleting them,
 - 1.2.2.2. Edit the content of questions, including
 - 1.2.2.2.1. The full-text of the question
 - 1.2.2.2.2. Possible responses
 - 1.2.2.2.3. Instruments related to each possible response
 - 1.2.2.3. Instruments related to each possible response
 - 1.2.3. System shall provide a means by which CMS Administrator can create new questions, providing the following information:
 - 1.2.3.1. The top-level and sub-category in which the question should appear.
 - 1.2.3.2. The full-text of the question as it should be presented to users.
 - 1.2.3.3. A collection of possible responses
 - 1.2.3.4. A collection of related instruments based on each of the possible responses
 - 1.3. System must provide a means by which the user can delete existing questions.
 - 1.3.1. System must prompt user to confirm their intention to delete a question before deleting it, OR move it instead to a Trash collection from which it can be recovered if necessary.
 - 1.4. System shall provide a WYSIWYG editor for entry of question text.
 - 1.5. System shall provide a means by which CMS Administrator can manage wizard question categories with support for the following operations:
 - 1.5.1. Create new categories
 - 1.5.2. Rename existing categories
 - 1.5.3. Delete existing categories
 - 1.5.4. Publish and unpublish categories
 - 1.5.5. Reorder existing categories

Related GUI Elements

CMS Administrator Dashboard

Maintain Wizard View

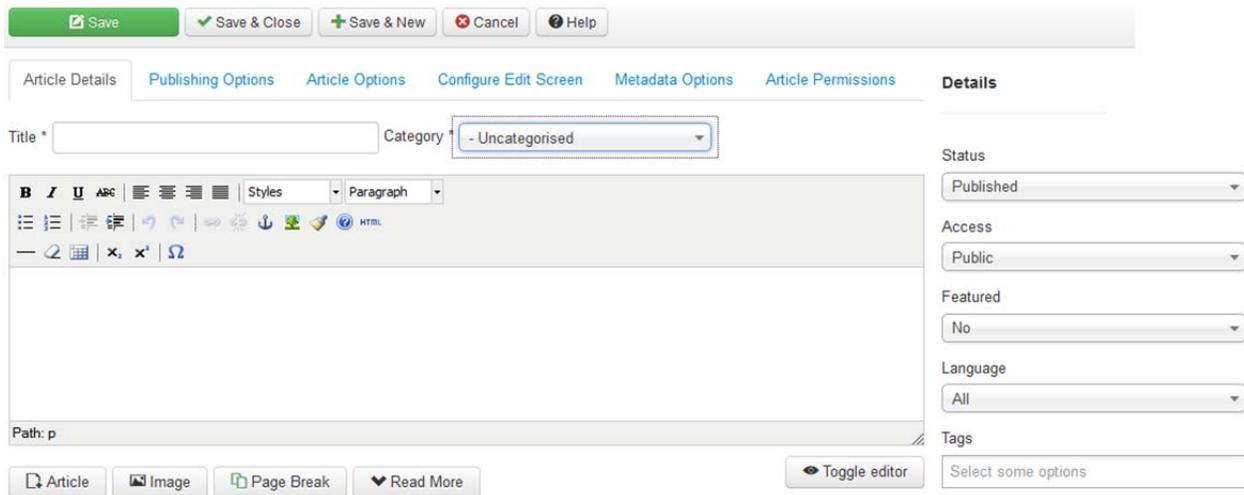
Edit Wizard Question View

Edit Categories View

APPENDIX C - Graphical User Interface Elements

The following Graphical User Interface Elements are presented herein to facilitate interpretation of the Use Case Specifications they support. They are intended to express the spirit or essence of expected behavior, however are not meant to be reproduced literally in every case. A best effort has been made to allow for alternate interpretations and implementations provided that they substantially support the required functional behaviors described herein. Note that key elements are included herein while others, are not. Details of the elements not included herein are to be determined at design time.

Add New Article View



Adobe Acrobat Reader Print Icon

The icon image shown below is from Adobe Acrobat Reader's own user interface. It is shown here only for reference to facilitate interpretation of the Use Case Specifications it supports.



Adobe Acrobat Reader Save Icon

The icon image shown below is from Adobe Acrobat Reader's own user interface. It is shown here only for reference to facilitate interpretation of the Use Case Specifications it supports.



Agent Dashboard View

TBD

Attach File Dialog

Attach File

Use this form to attach a file to this . You can also explain what the file is for using a comment.

Attachment: Signed Affidavit.tif
The maximum file upload size is Mb. Please zip files larger than this.

Comment: (an optional comment describing this update)

Update comment:

Browse Content by Taxonomy View

BROWSE

Information on how to use this section of the site. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate.

FILTER BY: All Residential Commercial

FILTER BY:

<input type="checkbox"/> ARA - Administration and Regulatory Affairs	<input type="checkbox"/> MYR - Mayor's Office
<input checked="" type="checkbox"/> All	<input type="checkbox"/> HAS - Houston Airport System
<input type="checkbox"/> HFD - Houston Fire Department	<input type="checkbox"/> PD - Planning and Development
<input type="checkbox"/> HHS - Health and Human Services	<input type="checkbox"/> PR - Parks and Recreation
<input type="checkbox"/> HPD - Houston Police Department	<input type="checkbox"/> PWE - Public Works and Engineering
	<input type="checkbox"/> SWD - Solid Waste Management

- Airports [20]
- Animals [45]
- Commercial Activities [78]
- Consumer Health [100]
- Environmental Health [67]
- [Houston Police Department \[59\]](#)
- Life Safety & Fire Prevention [90]
- Parking Management [120]
- Parks & Recreation [90]
- Planning & Development [30]
- Public Works & Engineering [150]
- Solid Waste Disposal [90]
- Special Events [43]
- Transportation [87]

Browse Instructions

For more details about a specific permit, license or inspection or more information about opening or operating a business, call Houston 311.

For assistance using the Houston Permitting Center Portal, visit our [Help](#) section, [email us](#), or call 311.

You will need Adobe Acrobat Reader to view some documents. If you do not have Acrobat, you can download it using the link below:

[Download Acrobat Reader](#)

BROWSE

[Home](#) > [Browse](#) > **Houston Police Department (HPD)**

- ☐ HOUSTON POLICE DEPARTMENT [59]
 - ☐ Automotive [37]
 - ☐ Body Shops [2]
 - ☐ Parking Facility [3]
 - ☐ Rebuilders, Parts [6]
 - ☐ Repair [2]
 - ☐ Sales [14]
 - Motor Vehicle & Retail Supply Dealer, Initial
 - Motor Vehicle & Retail Supply Dealer, Renewal
 - [Motor Vehicle Dealer New, Initial](#)
 - Motor Vehicle Dealer New, Renewal
 - Business Change of Address
 - Retail Supply Dealer, Initial
 - Retail Supply Dealer, Renewal
 - Salesman License, Initial
 - Salesman License, Renewal
 - Salesman License, Transfer
 - Wholesale Auto Jobber & Supply Dealer, Initial
 - Wholesale Auto Jobber & Supply Dealer, Renewal
 - Wholesale Jobber & Retail Supply Dealer, Initial
 - Wholesale Jobber & Retail Supply Dealer, Renewal
 - ☐ Storage [3]
 - ☐ Towing/Booting [7]
- ☐ Identity Verification [22]
 - ☐ Clearance Letters [11]
 - ☐ ID/Fingerprint [11]

Browse Instructions

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CMS Manager Dashboard View

The screenshot displays the CMS Manager Control Panel dashboard. At the top, a dark blue header contains the text "Control Panel". On the left side, there is a "SUBMENU" section with "Dashboard" highlighted in blue. Below this, a "SYSTEM" section lists several administrative tasks: "Global Configuration", "System Information", "Clear Cache", "Global Check-in", and "Install Extensions". The main area of the dashboard is titled "QUICK ICONS (ADMIN)" and features a 4x4 grid of icons for various functions: "Add new item", "Items", "Featured items", "Trashed items", "Categories", "Trashed categories", "Tags", "Comments", "Extra fields", "Extra field groups", "Media Manager", "Online Image Editor", "Documentation", "Extend", "Community", and "Reader.com". On the right side, there is another "QUICK ICONS" section containing a list of management tools: "Add New Article", "Article Manager", "Category Manager", "Media Manager", "Menu Manager", "User Manager", "Module Manager", "Extension Manager", "Language Manager", "Global Configuration", "Template Manager", "Edit Profile", and a notification for version "3.1.5" with an "Update now!" button and a badge showing "3" updates available.

Content Manager Dashboard View

TBD

Create New Account Form

Save Save & Close Save & New Cancel Help

Account Details Assigned User Groups Basic Settings

Name *	<input type="text"/>
Login Name *	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Email *	<input type="text"/>
Registration Date	<input type="text"/>
Last Visit Date	<input type="text"/>
Last Reset Date	<input type="text"/>
Password Reset Count	<input type="text" value="0"/>
Receive System emails	<input checked="" type="radio"/> No <input type="radio"/> Yes
Block this User	<input checked="" type="radio"/> No <input type="radio"/> Yes
ID	<input type="text" value="0"/>

Download Application Button

TBD

Edit Application View

View shown here is only representative because the view will vary based on the requirements of individual instrument application forms.

EDIT APPLICATION

You may edit any portion of this application. Fields in **Red** are incomplete and required.

CITY OF HOUSTON

Application for License to Deal in Motor Vehicles, Trailers, Motor Vehicle Parts and Accessories

Application is hereby made to you for an license, and, in this behalf the following is made:

 [See explanations of each License here.](#)

Business Name:

 **Attach copy of Assumed Name Certificate**

Physical Address:

Mailing Address:

Date business began at this location:

Email Address:

Phone Number:

Applicant is owner lease holder of property? If lease holder, give names and address of person for whom you are leasing:

 **Attach copy of the lease agreement or property deed, an engineered survey, and legal description of the property.**

I understand that this application is an official government record. I understand that knowingly making a false entry or omitting required information in one or more of the above fields could result in criminal charges and the denial/revocation of my license.

[Save and Finish Later](#)

[Submit](#)

[Edit Profile View](#)

TBD

Find Application View

TBD

Guest Online Chat Form

TBD


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Official Site for Houston, Texas

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Select Language ▼

HOME ABOUT US CONTACT US NEWS & EVENTS SIGN IN/CREATE NEW ACCOUNT

BROWSE

WIZARD

SCHEDULE

HELP

Welcome to the Houston Permitting Center



WELCOME

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

BROWSE

WIZARD

SCHEDULE

HELP

TAKE OUR SURVEY



Rate Our Performance

VIEW OUR ANNUAL REPORT



or

Sign Up

If you don't have an account yet

Sign In

Forgot Password?

Sign Up

SITE DIRECTORY

<p style="font-size: 10px; margin-top: 0;">BROWSE</p> <p style="font-size: 10px; margin-top: 5px;">WIZARD</p> <p style="font-size: 10px; margin-top: 5px;">SCHEDULE</p> <p style="font-size: 10px; margin-top: 5px;">HELP</p> <ul style="list-style-type: none"> FAQs Residential How-To Guides Visiting HPC Building Codes Municipal Codes Fee Schedules Department Links Live Chat 	<p style="font-size: 10px; margin-top: 0;">ABOUT US</p> <ul style="list-style-type: none"> Structure Department Descriptions Leadership Team Advisory Board Performance Annual Report Monthly Measures Sustainability Initiatives GBRC USGBC 	<p style="font-size: 10px; margin-top: 0;">CONTACT US</p> <ul style="list-style-type: none"> Phone Directory Hours of Operation Customer Surveys Directions To HPC Parking Information Reserving HPC Training Rooms Types of Equipment Events & Receptions Reservation Process Forms & Applications 	<p style="font-size: 10px; margin-top: 0;">NEWS & EVENTS</p> <p style="font-size: 10px; margin-top: 5px;">SIGN IN/CREATE NEW ACCOUNT</p>
--	--	--	--

facebook

311

HELP & INFO

Disclaimer: The City has tried to give you correct information through The Houston Permitting Center. While The Houston Permitting Center is being developed, certain information or requirements may be missing. Errors are possible, updates about recent activity may not yet have been entered and the results depend on the search words or numbers used. The information provided on The Houston Permitting Center is not legal advice. You may need additional information to meet the legal requirements for starting or running your business.

The Texas Public Information Act (TPIA) gives the public the right to access government information without being asked why you want them. To view a listing of information available for request by department and how to make a request, please [CLICK HERE](#).

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Site best viewed at 1280 x 1024 screen size

HPC Main Navigation Menu



Instrument Home View (Overview)

Motor Vehicle Dealer License

Overview FAQs Apply/Renew Schedule Inspection Contact

Motor Vehicle Dealer License

Required for any person who, publicly engages in, conducts, or carries on the business of buying, selling, offering for sale to the public, consigning to be sold to the public, trading or otherwise dealing in motor vehicles or motor vehicle trailers, or both, with and to the public.

TYPE:	Paper License	FEES:	ORIGINAL COST:	\$330.00
VALID PERIOD:	365 Days		ADMIN FEE:	No
INSPECTION REQUIRED:	No		LATE FEE:	No
RENEWAL REQUIRED:	Yes		RENEWAL COST:	\$330.00

PROCESS

1. Apply for License - Apply online or present a fully completed application form.
 - Attach copy of Deed Restriction Compliance Affidavit.
 - Attach copy of Certificate of Occupancy or Life Safety Inspection for your building

If applicant is a corporation:

 - Attach copy of Articles of Incorporation
 - Attach copy of letter of good standing from the Secretary of State
 - Attach copy of Assumed Name Certificate if applicable
2. Criminal Background Check - A criminal background check is conducted on all officers, partners, owners (licensees) and others who have a financial interest in the business.
3. Automotive Board Review - The City of Houston Automotive Board reviews the application for each new business including consideration of the findings of a criminal background check.
4. Notice of an Automotive Board public hearing on the business application is published.
5. Approval or Denial is decided by the Board at the hearing.

VARIATIONS & EXCEPTIONS

None.

INSPECTIONS

None required.

STATUTORY AUTHORITY

[08-58\(a\)\(1\)](#)

Instrument Home View (FAQs)

Motor Vehicle Dealer License

Overview

FAQs

Apply/Renew

Schedule
Inspection

Contact

FREQUENTLY ASKED QUESTIONS:

How long will it take to process my application?

Assuming your application is complete and submitted with all required attachments, the usual time for processing a request for a Motor Vehicle Dealer License is less than 15 days.

Will a misdemeanor conviction on the record of an officer, owner, or partner jeopardize approval of our application?

All applications and criminal background checks are evaluated by the review board on a case-by-case bases. Generally, however, misdemeanor convictions alone will not jeopardize approval of your application.

Will I receive notification of when the Automotive Board public hearing is held?

Yes. You will be notified by US Mail when the Automotive Board public hearing is scheduled.

Is the Motor Vehicle Dealer License transferable?

No. The Motor Vehicle Dealer License is only valid for the individual or business named on the license, and may not be transferred to any other entity.

Instrument Home View (Apply/Renew)

Motor Vehicle Dealer License

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Apply/Renew

You can either apply online for this permit or download the application and submit it through the mail or in person at the Houston Permitting Center.

To apply online:

Use the link below to go to the online form. You will need to have the following documents in electronic format ready to be attached to the form:

- Assumed Name Certificate
- Lease Agreement or Property Deed
- Engineered Survey
- Legal Description of the property
- Corporate or Partnership Agreement
- City Occupancy Permit
- Deed Restriction and Law Compliance Affidavit

[Apply Online](#)

To apply by mail or in person:

Use the link below to go to download the application. You will need to have copies of the following documents ready to be included with the form:

- Assumed Name Certificate
- Lease Agreement or Property Deed
- Engineered Survey
- Legal Description of the property
- Corporate or Partnership Agreement
- City Occupancy Permit
- Deed Restriction and Law Compliance Affidavit

[Download Application](#)

Deed Restriction and Law Compliance Affidavit

Whether you apply online, through the mail, or in person, you will need to have the following form signed and Notarized. Use the link to download the form. See the Contact tab above to see our mailing address or location address.

[Download Affidavit](#)

Instrument Home (Schedule)

Motor Vehicle Dealer License

Overview	FAQs	Apply/Renew	Schedule Inspection	Contact
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Schedule Inspection

An Inspection is not required for this permit.

Instrument Home (Contact)

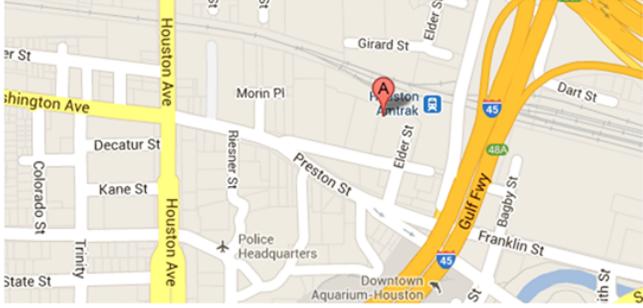
Motor Vehicle Dealer License

Overview	FAQs	Apply/Renew	Schedule Inspection	Contact
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Contact

Live Chat Click Here to chat with a representative	By Phone Lance Labbe 832-394-4814	By Mail Houston Permitting Center HPD Auto Dealers Dept. P. O. Box 3408 Houston, TX 77253-3408
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In Person

Houston Permitting Center 1002 Washington Avenue Houston, Texas 77002 Google Map & Directions	
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Online

Please use the following form to contact this department online. Items with an asterisk (*) are required. A representative will contact you.

*Name: <input type="text"/>	Additional Information: <input type="text" value="enter text..."/>
Organization: <input type="text"/>	
*Telephone: <input type="text"/>	
*Email: <input type="text"/>	
*Subject: <input type="text" value="General Inquiry"/>	

Sing5e b3r4y

Type the words shown above:

Keyword Search Form

Included in HPC Home Page

Logout Link

TBD

Manage Attachments View

File Attachments:	1.  Signed Affidavit.tif (0.0 kb)	This is a scanned copy of the required affidavit, signed by our company President.	Download Delete
--------------------------	--	--	---

Manage Bookmarks View

My Account

Manage Bookmarks

Bookmarks

Fire Escape Permit	Delete
Motor Vehicle Dealer New, Initial	Delete
Salesman License, Initial	Delete

Manage Applications View

My Account

Manage Applications

Submitted Applications Status

Status

Fire Inspection

PENDING

Auto Sales, Identity

APPROVED

Application Drafts

Last Modified

Status

Motor Vehicle Dealer New, Initial

July 16, 2013

INCOMPLETE

Continue Editing

Delete Application

Salesman License, Initial

July 16, 2013

INCOMPLETE

Continue Editing

Delete Application

Fire Escape Permit

June 24, 2013

INCOMPLETE

Continue Editing

Delete Application

Manage Wizard Scenarios View

My Account

Saved Wizard Scenarios

Scenario	Last Modified	Status			
Body Shop	June 5, 2013	INCOMPLETE	Continue Editing	Rename	Delete Scenario
Car Dealership	July 30, 2013	COMPLETE	View Results	Rename	Delete Scenario
Rental Car Company	July 26, 2013	INCOMPLETE	Continue Editing	Rename	Delete Scenario

Management Portal Login Form

User Name

Password

Language - Default

My Account Menu

TBD

Online Help View


The City of Houston
Official Site for Houston, Texas

[Home](#) | [I Want To](#) | [Government](#) | [Residents](#) | [Business](#) | [Departments](#) | [Visitors](#) | [En Espanol](#)

HOUSTON PERMITTING center

Select Language ▼

HOME ABOUT US CONTACT US NEWS & EVENTS SIGN IN/CREATE NEW ACCOUNT

BROWSE

WIZARD

SCHEDULE

HELP

HELP

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FAQs

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VIEW ▶

RESIDENTIAL HOW-TO GUIDES

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VIEW ▶

VISITING HPC

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VIEW ▶

LIVE CHAT

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VIEW ▶

BUILDING CODES

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VIEW ▶

MUNICIPAL CODES

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VIEW ▶

FEE SCHEDULES

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VIEW ▶

DEPARTMENT LINKS

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VIEW ▶

SITE DIRECTORY

<p>BROWSE</p> <p>WIZARD</p> <p>SCHEDULE</p> <p>HELP</p> <ul style="list-style-type: none"> FAQs Residential How-To Guides Visiting HPC Building Codes Municipal Codes Fee Schedules Department Links Live Chat 	<p>ABOUT US</p> <ul style="list-style-type: none"> Structure Department Descriptions Leadership Team Advisory Board Performance Annual Report Monthly Measures Sustainability Initiatives GBRC USGBC 	<p>CONTACT US</p> <ul style="list-style-type: none"> Phone Directory Hours of Operation Customer Surveys Directions To HPC Parking Information Reserving HPC Training Rooms Types of Equipment Events & Receptions Reservation Process Forms & Applications 	<p>NEWS & EVENTS</p> <p>SIGN IN/CREATE NEW ACCOUNT</p>
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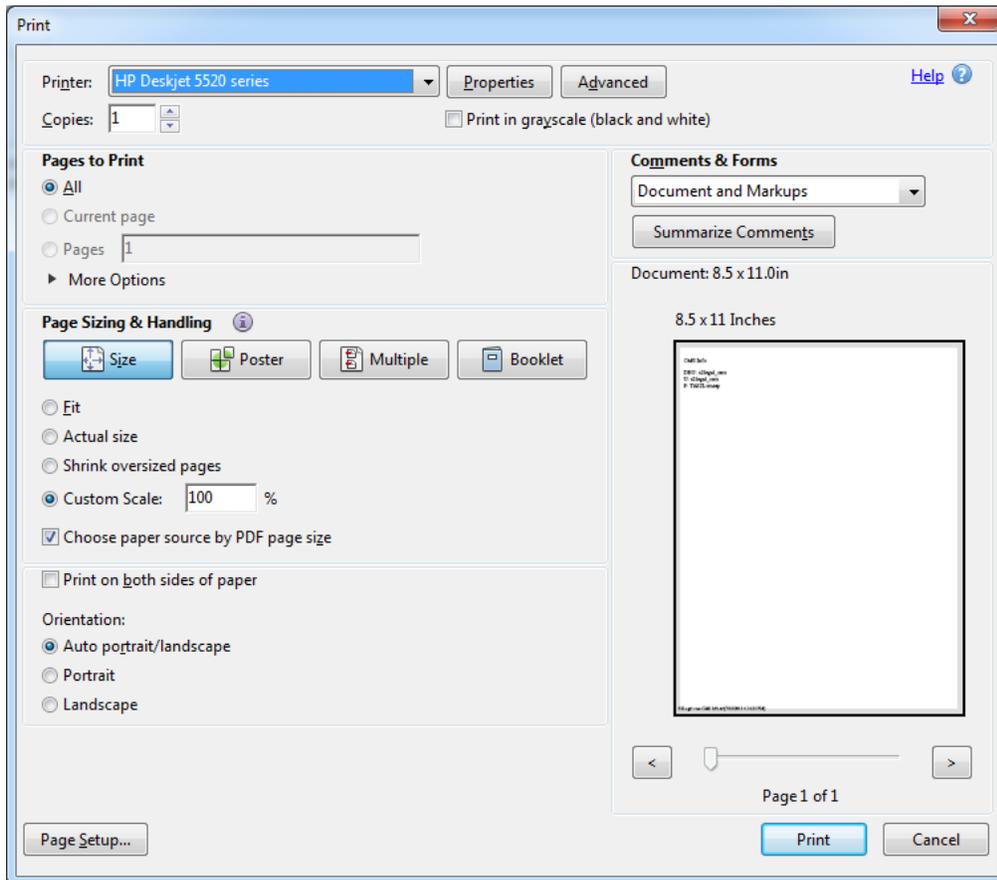
Online Chat Icon

TBD

Online Chat Agent User Interface

TBD

Print Dialog Box



Private Portal Login Form

<input type="text" value="example@gmail.com"/>
<input type="password" value="*****"/>
<input type="button" value="Sign In"/> Forgot Password?

Related Document View

Bookmark This

Motor Vehicle Dealer License

Overview

FAQs

Apply/Renew

Schedule
Inspection

Related Documents

Contact

Related Documents

Motor Vehicle & Retail Supply Dealer

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Business Change of Address

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Salesman License

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Wholesale Auto Jobber & Supply Dealer

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Storage Lot Operator

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Auto Sales/Identity

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Wrecker Driver/Identity

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

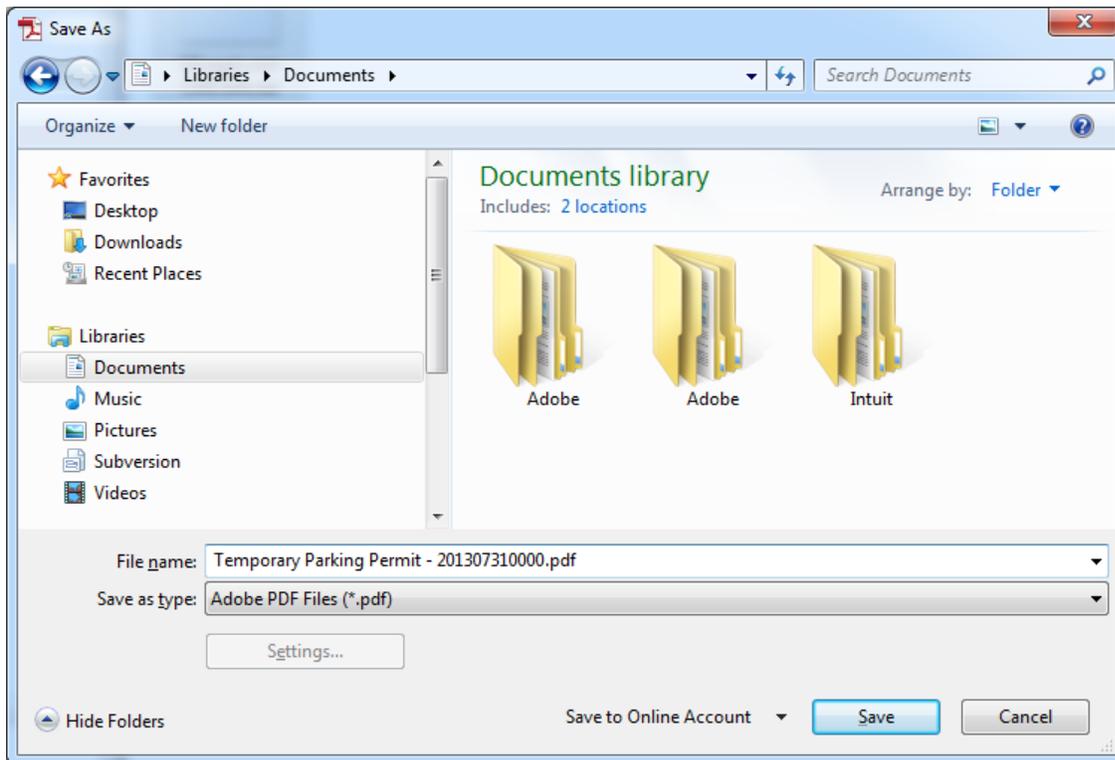
Save Wizard Scenario View

Save Wizard Scenario

Save this scenario to your account so that you may come back at a later time and continue editing it.

Enter Name of Scenario

Save As Dialog Box



SCHEDULE

You Selected: HPD Identification Division > Fingerprints/Clearance Letter

HPD IDENTIFICATION DIVISION

Service

Fingerprints/Clearance Letter

[Fee Schedule](#) ▶

[Website](#) ▶

Kiosk Option

Other Services ---> HPD ---> Fingerprints/I.D.

[Create/Manage
ONLINE
RESERVATION](#) ▶

Business Hours

8:00 AM to 3:30 PM

Contact Number

832.394.4874 or 832.394.4873

Applications

See HPD I.D. for application

Keywords

immigration, adoption, overseas travel, citizenship, passport, political asylum, hunting, missionary, school, sex offenders, school bus drivers, volunteers, police cadets, background check

Search Results



You Searched On: Car Dealership License

Motor Vehicle & Retail Supply Dealer

Description

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Motor Vehicle Dealer New

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Salesman License

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Wholesale Auto Jobber & Supply Dealer

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

Page 1 2 3 4... 12 Next>

Sign In / Sign Up Pane

<input type="text" value="example@gmail.com"/>	or	Sign Up
<input type="password" value="*****"/>		If you dont have account yet
<input type="button" value="Sign In"/>	Forgot Password?	<input type="button" value="Sign Up"/>

WIZARD

- 1 SECTOR
- 2 STRUCTURE
- 3 PLACE
- 4 PEOPLE
- 5 PRODUCT
- RESULTS**

RESULTS > Administrative and Support

Page: 1

Selected Structure: Legal Services

Information on how to save permits to your account. Lorem ipsum dolor sit amet, conser adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

➔ ALARMS

↓ AUTOMOTIVE

Motor Vehicle Dealer New

View

Bookmark

Automotive Retail Supply Dealer

View

Bookmark

➔ COIN-OPERATED MACHINES

↓ FIRE ESCAPE

Fire Escape Permit

View

Bookmark

➔ FIRE INSPECTION

➔ IDENTITY VERIFICATION

➔ PARKING

↓ PHOTOGRAPHY AND FILMING

Filming Permit

View

Bookmark

➔ SIGNS

➔ WASTE DISPOSAL

SAVE SCENARIO

WIZARD

- 1 SECTOR
- 2 STRUCTURE
- 3 PLACE
- 4 PEOPLE
- 5 PRODUCT
- RESULTS

Step 1: Sector

Page: 1

? 1. Please select from the following sectors those which best describe your business type:

- Accommodations
- Administrative and Support Services
- Arts, Entertainment and Recreation
- Construction
- Educational Services
- Finance and Insurance
- Food and Beverage Services
- Health Care
- Information
- Management of Companies and Enterprises
- Manufacturing
- Non Profit
- Real Estate
- Rental and Leasing
- Retail
- Services
- Social Assistance
- Transportation
- Warehousing and Storage
- Waste Management and Remediation
- Wholesale Trade

CONTINUE

APPENDIX D – Additional Resources

The following resources have been produced to support this specification and the development work that will be necessary to implement the HPC Portal System.

Instrument Index

The Instrument Index is an essential inventory of the collection of instruments that have been identified for publishing and management in the HPC Portal System. The Instrument Index is available for download as a ZIP archive from:

<http://pweDEV.houstontx.gov/hpcdev/instrument-index.zip>.

Workflow Index

The Workflow Index is an essential reference for creation of content related to an instrument, and particularly the Overview page of the Instrument Home. The Instrument Index is available for download as a ZIP archive from:

<http://pweDEV.houstontx.gov/hpcdev/workflow-index.zip>.

Taxonomy & Thesaurus

The proposed controlled vocabulary for the HPC Portal is published online for review at:

<http://pweDEV.houstontx.gov/hpcdev/tematres/instruments/thesauruswebpublisher/>

Home Page & Key Sub-Page Designs

Fully-rendered design concepts for the Home page and key sub-pages of the HPC Portal are available for review online at:

<http://pweDEV.houstontx.gov/hpcdev/concepts/>

Wireframe Representation of User Interface

A set of navigable wireframes has been published online and is available for review at:

<http://share.axure.com/QPGAWS/>

PWE Style Guide

PWE's Style Guide describes the common web styles prescribed for all City of Houston web sites, plus additional web styles that are unique to PWE (whose IT group manages the HPC website). It describes the onscreen elements such as headers, logos, standard color palette and standard typography for COH branding. It also presents guidelines for page layout and graphic elements.



PWE Style Guide

HPC Identity Standards

The HPC Identity Standards prescribes a standard color palette, standard typography, and the size and placement of the HPC logo.



HPC Identity Standards

[END]