# General Information

## Definitions

The following acronyms and words may be used in this document.

|  |  |
| --- | --- |
| Cal/EPA | Acronym for the California Environmental Protection Agency. See <http://www.calepa.ca.gov/>. |
| CERS | California Environmental Reporting System, Version 1. |
| CERS Data Registry | An online version of the Unified Program Data Standard available at <https://cers.calepa.ca.gov/Data/Registry/>. |
| CERS ID | A unique identifying number, assigned by CERS to each facility. |
| CERS2 | California Environmental Reporting System Version 2, anticipated Summer 2011. A subsequent version of CERS. |
| Client | Cal/EPA |
| Common Data | *Common Data* is a *submittal element* defined as information that is required to exist in CERS before any other submittal element can be submitted and be considered for approval. Common Data can only be approved by the Facilities CUPA (never by a PA). This information presently is represented on the Business Activities form, and the Business Owner/Operator form. |
| CUPA | Certified Unified Program Agency. See <http://www.calepa.ca.gov/CUPA/>. |
| Data Standard | See Unified Program Data Dictionary. |
| Electronic Data Transfer | Refers to the process of the exchange of data electronically between two or more parties, in this case Cal/EPA Unified Program, Regulatory Entities (local governments), and Businesses. |
| Exchange Standard | A detailed description of the processes and interfaces by which a CUPA may exchange data with CERS2. The document is anticipated Summer 2011. |
| Facility | A physical location that is regulated by the Unified Program. |
| Facility Transmission | A transmission refers to the process of a business or regulator sending XML data to the CERS XML Web Services. This type of transmission contains Facility Submittal data for one or more facilities. |
| Inspection/Enforcement Transmission | Refers to the process of a Regulator sending XML data to CERS XML Web Services. This type of transmission contains Inspections/Enforcements data for one or more Facilities. |
| PA | Participating Agency - An entity which, by formal agreement with the CUPA, agrees to implement one or more of the CUPA Program Elements. |
| Project Originator/Requestor | Jim Bohon |
| Regulator | Local or state regulating agency that has authority for one or more *submittal elements* for a specific geographic region. |
| Software | Software includes computer programs, in object form, and all related documentation, materials, and all modifications made hereafter, in whole or in part. |
| Submittal | One or more submittal action elements containing *one* or more *submittal elements*. |
| Submittal Action | A set of system fields needed that describe who is submitting the *submittal*, the status of the *submittal*, business and/or *regulator* contacts acting/submitting the *submittal,* and other meta-data that drives the process of approving/rejecting submittals. |
| Submittal Element | A collection of fields defined in Unified Program Data Dictionary that represent a single form and/or group of UPCF Forms for a specific program (UST for example) at a specific facility. *Submittal elements* can be approved by separate Regulators, but only one *regulator* per element per facility. A submittal element is also the data transfer unit of rejection in CERS. This means that if a batch of three submittal elements were to be sent and two pass validation and one doesn’t, instead of the entire batch being rejected; only the one submittal element would be rejected. |
| Transaction | A single facility *submittal element*. If any data does not pass validation, the entire facility *submittal element* is rejected. |
| Unified Program Data Dictionary | A detailed description of the data fields that are required to implement the electronic reporting mandates of AB 2286 (2008). |
| Validation | Ensuring that data inserted into an application satisfies defined formats and other input criteria. |
| Web Service, Web Services | A method of communication between two electronic devices over a network. |
| XML | A set of rules for encoding documents in machine-readable form. |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

## Service Description

The Cal/EPA requires that Natoma Technologies enhance Accela CUPA software by adding features, data elements, configuration, and processes such that California CUPAs may use Accela CUPA software to exchange certain data electronically with CERS.

At a high level, the project includes the following components:

1. Modify Accela CUPA software database fields to match the current Unified Program Data Dictionary.
2. Modify Accela CUPA software support code values to establish and enforce valid values described by the Unified Program Data Dictionary v3.10.
3. Modify Accela CUPA software to capture configuration and account information required to securely consume web services published by CERS.
4. Modify Accela CUPA software to make a secure connection using public networks, authenticate using stored credentials, and consume web services published by CERS.
5. Modify Accela CUPA software to log CERS transactions (successful and failed).
6. Modify Accela CUPA software to track pending (e.g., dirty) records to be exchanged with CERS.
7. Consume CERS web services in order to:
   1. Receive pending CERS submission(s).
   2. Receive approved CERS submission(s).
   3. Receive specific CERS submission(s).
   4. Approve/reject CERS submission(s).
   5. Submit approved submissions.
   6. Submit inspection details, violation details, and enforcement events.
   7. Update inspection details, violation details, and enforcement events.
   8. Receive inspection details, violation details, and enforcement events.
   9. Approve/reject CERS access requests.
   10. Request/receive a particular document (uploaded document)
8. Create XML document containing Inspection/Enforcement events
9. Load, validate, and import XML document or flat file containing Inspection/Enforcement Events (from PAs)
10. Create and validate file (format to be defined) to seed CERS.
11. Establish and cross-link violations according to prescribed numbering system.
12. Modify Accela CUPA software to adhere to published XSD, enforcing published data standards, required fields, etc.

## Involved Parties

The following involved parties will serve as contacts between the Client and Natoma Technologies.

### Cal/EPA

|  |  |
| --- | --- |
| Jim Bohon, Manager  Cal/EPA Unified Program  1001 "I" Street, P.O. Box 2815  Sacramento, CA 95812 | |
|  |  |
| Phone: | (916) 327-5097 |
| E-mail: | [jbohon@calepa.ca.gov](mailto:jbohon@calepa.ca.gov) |

### Natoma Technologies

|  |  |
| --- | --- |
|  | |
|  |  |
| Phone: |  |
| Fax: |  |
| E-mail: |  |

# Background Information

## Business Needs Analysis

[Describe the customization request and how this customization will be used. Provide as much detail as possible so Natoma Technologies can have a better understanding of what is being requested, the scope analysis, and the impact on existing applications and workflows.]

## Date Required and Restrictions

Client requested completion date: **[04/31/12] For Operational Testing**

This date is not the final date for the start or implementation of this project. This date represents the preliminary date that is currently available based on current obligations by Natoma Technologies resources; other contractual obligations may change this date. No date can be considered finalized until a contract is in place upon acceptance of a Pricing Proposal to be submitted to you for acceptance after receipt of the Scope Approval sign-off in this document.

This customization has the following regulatory requirements or restrictions:

## Additional Supporting Information

[Enter additional information that will be helpful in further explaining the customization request.]

[Enter “None - No additional information.” if this is true.]