

**DOT Authorized Parking Application**

**Account Creation**

**Use Case**

**Version 1.2**

**VERSION CONTROL/ACCEPTANCE**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
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1. ACCOUNT CREATION
   1. FILE LOCATION

Once the file is ready for review, it will be placed under the following folder:

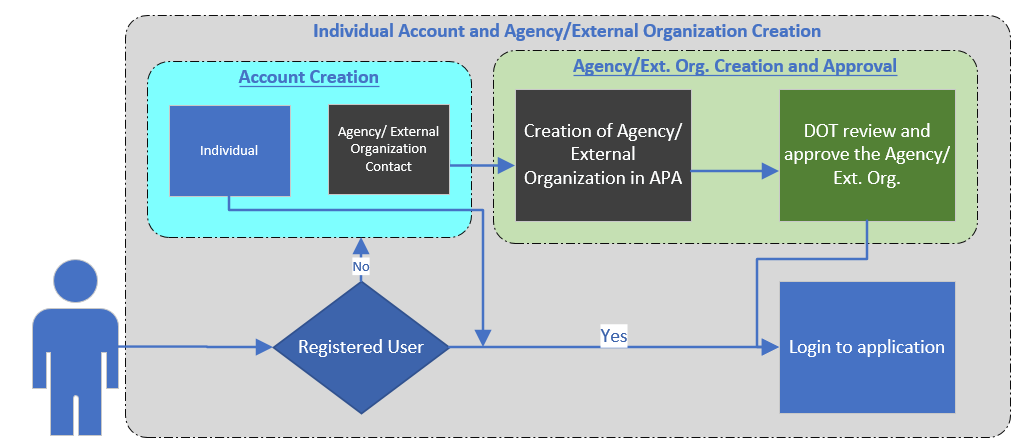
*Link to be provided.*

**Path:**

*Path to be provided.*

* 1. DESCRIPTION

The APA system will enable individuals, agencies, and external organizations to create account online.



* 1. CONCPTUAL DIAGRAM



* 1. ACTORS

**Applicant**

**Description:** Person creating an account. The applicant may be an individual, external organization contact, liaison or agency contact.

**DOT Supervisor**

**Description:** DOT staff responsible for approving organizations and contacts.

**DOT Mailroom Staff**

**Description:** DOT mail room and service staff, who will receive documents through mail, can scan and upload the documents in the system. They can also create an account/application in system on behalf of applicant.

**APA – System**

**Description:** System where all actions take place (e.g., account creation, application creation, permit processing, permit issuance, post permit issuance functions and notifications).

1. USE CASES
   1. UC1: ACCOUNT CREATION - INDIVIDUAL
      1. DESCRIPTION

This use case describes the process of creating a new account by an individual in APA system.

* + 1. ACTORS
* An Applicant - User
* APA - System
  + 1. PRECONDITIONS
* Applicant have the APA URL.
  + 1. MAIN APPLICATION FLOW

1. User launches the APA portal
2. User enters all mandatory details. (Refer to [Appendix A – Data Dictionary](#DataDictionary))
3. User submits the information.
4. User gets a confirmation for account creation by mail or email notification (based on user’s communication preference and information shared in step 2.1.4.2).
5. The flow ends.
   * 1. BUSINESS RULES
6. The system only creates new account with unique details from an individual. Each account will be unique. Uniqueness will be based on “ID Type + ID Number”.
7. Username should be unique. If duplicate username is mentioned, system will show an error message (please refer to the [Appendix A](#DataDictionary) – Data Dictionary).
8. Only one account per email address. System will throw error message “Entered email address is already associated with an account” in case a user tries to use same email address twice for account setup.

***Note****: Email address is an optional field while creating account. (Refer to* [*Appendix A – Data Dictionary*](#DataDictionary)*: Tab – “Account-Individual”)*

* + 1. POST CONDITIONS
* User can login into APA using his/her account credentials.
* User can initiate PPPD City and State applications.
* User can see notifications (if any).
* User can browse information exposed to the public.
* User can submit a request to register a new agency/organization.
* User can update his/her profile information.
* System will send “Welcome Notification” to the user.

***Note****: Profile information (except address and phone number) cannot be updated if a permit application is in-progress.*

* + 1. ALTERNATE FLOWS
       1. AF1: USER ALREADY EXISTS IN THE SYSTEM

1. System will throw an error message – “User already exists in the system” if “document ID + Document No” already exists in the system.
2. Individuals having an active account in APA can initiate the process of registering a new organization. Refer to “[Use Case 2.3: Account Creation – Agency](#UC2)” or “[Use Case 2.6: Account Creation – Organization](#UC6)” for more information.
   * 1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **Applicant** |
| --- | --- | --- |
| Account creation | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

UI Fields – Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-Individual)

* 1. UC2: ACCOUNT UPDATE - INDIVIDUAL
     1. DESCRIPTION

This use case describes the process of updating account information by an individual in APA system.

* + 1. ACTORS
* An Applicant - User
* APA - System
  + 1. PRECONDITIONS
* Applicant already created account on APA.
* Applicant has the login credentials.
  + 1. MAIN APPLICATION FLOW

1. User launches the APA portal
2. User enters the login credentials.
3. User modifies the account information-
   1. Address
   2. Add Email Address (if not added previously as email address is an optional information when creating an individual account).
   3. Update Password
   4. Contact Number
   5. Communication Method
   6. Security Answers
   7. Update Documents, or add documents and ability to set existing document as expired/inactive if needed.
4. User submits the information.
5. The flow ends.
   * 1. BUSINESS RULES
6. User cannot update the “username”.
7. User cannot update account information (except address and phone number) if an application is under review.
8. Email address is unique in APA. System will throw error message “Entered email address is already associated with an account” in case a user tries to use an email address already entered in APA.

***Note****: Email address is an optional field while creating account. (*[*Refer to Appendix A – Data Dictionary*](#DataDictionary)*: Tab – “Account-Individual”)*

* + 1. POST CONDITIONS
* User can login into APA using his/her account credentials.
* User can initiate PPPD City and State applications.
* User can see notifications (if any).
* User can browse information exposed to the public.
* User can submit a request to register a new agency/organization.
* User can update his/her profile information.

***Note****: Profile information (except address and phone number) cannot be updated if a permit application is in-progress.*

* + 1. ALTERNATE FLOWS
       1. AF1: FORGOT PASSWORD

1. User will click on “Forgot Password” link on login page.
2. Based on status of account, user will provide information. Please refer to [Appendix A – Data Dictionary](#DataDictionary) (Tab: Forgot Password).
3. The flow ends.
   * + - 1. POST CONDITIONS
4. User will login into the system using new password.
5. Password Change notification needs to be sent to user
   * + 1. AF2: FORGOT USERNAME
6. User will click on “Forgot Username” link on login page.
7. Based on status of account, user will provide information. Please refer to [Appendix A – Data Dictionary](#DataDictionary) (Tab: Forgot Username).
8. The flow ends.
   * + - 1. POST CONDITIONS
9. User will login into the system using username and password.
   * + 1. AF3: REGISTER NEW AGENCY/EXTERNAL ORGANIZATION
10. User will login to APA.
11. User will click on “Register New Agency/External Organization”. Please refer to use case [US3 “Account creation – Agency” section 2.3.4](#UC234) or [US6 “Account creation – External Organization” section 2.6.4](#UC264) for more details.
12. System will auto populate Primary contact’s information from logged in user’s profile.

***Note****: System will prompt user to provide email address if not entered previously.*

1. User will submit.
2. The flow ends.
   * + - 1. BUSINESS RULES

* One individual can be primary contact for multiple organizations.
* Please refer to use case [US3 “Account creation – Agency” section 2.3.5](#UC235) or [US6 “Account creation – External Organization” section 2.6.5](#UC265) for business rules.
  + - * 1. POST CONDITIONS
* System will create a task for DOT Supervisor to review Agency/External Organization information. DOT Supervisor will approve/reject the Agency/External Organization”.
  + 1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **Applicant** |
| --- | --- | --- |
| Account Update | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

UI Fields – Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-Individual)

* 1. UC3: ACCOUNT CREATION - AGENCY
     1. DESCRIPTION

This use case describes the process of creating a new account by an individual of a government agency.

* + 1. ACTORS
* An individual from an agency - User
* APA - System
  + 1. PRECONDITIONS
* User have the APA URL.
* User has agency details like Agency Code, Agency Name, etc.- Please refer to [Appendix A - Data](#DataDictionary) Dictionary (Tab: Account-Agency).
* Agency Code and Agency name information will be entered by DOT Admin in the system (this is required for auto population of agency code and name) . DOT Admin will maintain this list in system.
  + 1. MAIN APPLICATION FLOW

1. An employee of an agency launches the APA portal.
2. User clicks on ‘Register Organization’ button.
3. User will select if organization is a Government (City, State or Federal) Agency or a private organization.
4. User will enter “Agency Code” or “Agency Name”. Based on user entry, system will auto populate agency name/code.
5. User enters the agency specific details. Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-Agency).
6. User will select type of permit agency is interested in.
   1. ABPP (Agency Business Parking Permit)
   2. CAPP (Citywide Agency Parking Permit)
   3. AAOSP (Agency Authorized on Street Parking Permit)
7. User will upload the required documents. Please refer to Appendix A - Data Dictionary (Tab: Documents).
8. User will submit agency and contact information
9. The flow ends.
   * 1. BUSINESS RULES
10. Agencies can have only one account in APA.
11. DOT Supervisor will review the information/documents shared by user and will approve/reject the organization. Please refer to “[Use Case 2.4 DOT Review Process](#UC4)” for further details.
12. Primary Contact is mandatory for every agency.
13. Primary Contact document verification is needed every time when a new Primary contact is added or updated. DOT will manually verify all the information/documents.
    * 1. POST CONDITIONS

* System will create a task for DOT Supervisor to review agency information. DOT Supervisor will approve/reject the agency.
  + 1. ALTERNATE FLOWS
       1. AF1: AGENCY ALREADY EXISITS IN THE SYSTEM
* If agency already exists in APA, system will give message “Agency already exists, please contact Agency Primary contact or Contact Permits & Customer Service for additional information..”
* If agency is under DOT review and someone tries to create account for same agency, system will give message “Agency account creation in under DOT review, please call DOT customer care for more information”.
  + - 1. AF2: NEW AGENCY
* If agency (code/name) is not pre-entered in APA, user will click on “Can’t find agency?” text link.
* User will enter agency code and agency name.
* User will enter agency specific details. Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-Agency).
* User will select type of permit agency is interested in.
  + ABPP (Agency Business Parking Permit)
  + CAPP (Citywide Agency Parking Permit)
  + AAOSP (Agency Authorized on Street Parking Permit)
* User will upload the required documents. Please refer to Appendix A - Data Dictionary (Tab: Documents).
* User will submit agency and contact information
* The flow ends.
  + 1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **Agency User** |
| --- | --- | --- |
| Account creation | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

UI Fields – Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-Agency)

* 1. UC4: DOT REVIEW PROCESS
     1. DESCRIPTION

This use case describes the process of reviewing organization/contact information [DOT will review organization creation requests (new organization) and primary contact transfer roles requests (for existing organizations)].

* + 1. ACTORS
* DOT supervisor
* APA - System
  + 1. PRECONDITIONS
* Agency/Organization submitted all required information.
  + 1. MAIN APPLICATION FLOW

1. A DOT supervisor logs in to the APA portal.
2. DOT supervisor reviews all the information –
   1. Submitted for an agency or an external organization creation. OR
   2. Submitted for primary contact transfer of role.
3. After reviewing all the information, DOT supervisor approves –
   1. New Agency/organization. OR
   2. Primary Contact role change for an existing organization.
4. Once approved by DOT, system will create the agency/organization and primary contact account (if individual is already in system, system will associate that user account with agency/ organization).
5. Primary Contact gets a confirmation on account creation by email.
6. The flow ends.
   * 1. BUSINESS RULES

* DOT supervisor can approve/reject an agency/external organization.
* If a new agency was added by the user, agency will be added in the existing list of agencies.
* Newly added Agency code and name should be unique.
  + 1. POST CONDITIONS

1. System will send a welcome email on approval.
2. Primary contact will setup the account.
3. Primary contact can add secondary contact
4. Primary contact can add division/approver/liaison.
5. Contact can update organization information, add/remove liaisons. DOT don’t need any information for change/update in secondary liaisons.
6. Primary contact information cannot be updated or deleted without DOTs approval.
   * 1. ALTERNATE FLOWS
        1. AF1: REJECT
7. A DOT supervisor logs in to the APA portal.
8. DOT supervisor reviews all the information submitted for an individual, agency or an external organization.
9. After reviewing all the information, DOT supervisor rejects the application.
10. DOT Supervisor will add the reasons for rejection. System will display a drop-down with pre-defined rejection reason. DOT supervisor will have ability to add rejection notes (text box).
11. Once rejected by DOT, system will create a rejection notification.
12. The flow ends.
    * + - 1. BUSINESS RULES
13. Primary contact may again try to add the agency/organization (Please refer to [Use Case 2.3: Account Creation – Agency](#UC3) and [2.6: Account Creation – External Organization](#UC6)) if rejected.
    * + - 1. POST CONDITIONS

System will send rejection email with reasons for rejection.

* + - 1. AF2: NEED MORE INFORMATION

1. A DOT supervisor logs in to the APA portal.
2. DOT supervisor reviews all the information submitted for an agency or an external organization.
3. After reviewing all the information, DOT supervisor needs more information to make a decision.
4. Supervisor will reach out to the applicant via mail/call (this will be out of the system).
5. User will enter notes/comments related to applicant interaction in the system about how the application was informed. System will maintain log of notes.
6. Once supervisor receives all the information from the applicant, supervisor will approve/reject the agency/organization.
7. The flow ends
   * + - 1. BUSINESS RULES

* If primary contact is unable to provide required information, agency/organization will not be created in the system.
* DOT Supervisor will reject the agency/organization if required information is not shared. Refer to [section 2.4.7.1](#Reject) for more information.
* System will display message “DOT review in progress”, if user tries to create an agency/organization which is under DOT review.
  + - * 1. POST CONDITIONS

Applicant will resubmit all the required details for creation of agency/organization.

* + 1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **DOT Supervisor** |
| --- | --- | --- |
| Agency/Organization Account Approve | Page | R, C, U |
| Agency/Organization Account Reject | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

* 1. UC5: DIVISION CREATION - AGENCY
     1. DESCRIPTION

This use case describes the process of adding a division by an individual of a government agency.

* + 1. ACTORS
* Agency Primary/Secondary Contact - User
* APA - System
  + 1. PRECONDITIONS
* Agency and contact account are already created in APA.
* Contact has the login credentials.
  + 1. MAIN APPLICATION FLOW

1. User launches the APA portal
2. User will login into APA and will add – division, approver and liaison.
3. User will upload required documents.
4. User will submit information.
5. System will create division/approver/liaison.
6. System will send account setup email.
7. The flow ends.
   * 1. BUSINESS RULES
8. Divisions will be unique for an organization. Uniqueness will be based on division name and address.
9. Organizations can add multiple divisions/ locations.
10. Primary/Secondary contact can change approver/liaisons.
11. DOT Supervisor will have ability to remove/add approver/liaisons.
12. One user can be contact (primary/secondary), liaison (primary/secondary) and approver for multiple agencies/divisions.
13. Same person cannot be Approver and Liaison in the same division.
    * 1. POST CONDITIONS
14. System will send email to approver/liaisons for account setup.
15. Approver/liaisons can view issued/rejected/in-progress application/ permits for assigned division.
    * 1. ALTERNATE FLOWS
         1. AF1: DELETE DIVISION

Primary/Secondary contact can delete an existing division.

* + - * 1. BUSINESS RULES

1. Division can be deleted by Contacts (primary/secondary).
2. Division should not have any active/expired permit.
3. Division should not have any application (saved/submitted/approved).
   * + - 1. POST CONDITIONS

System will delete the division and all associated information.

* + 1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **Agency Contact** |
| --- | --- | --- |
| Add/Delete Division | Page | R, C, U |
| Add/Remove Approver | Page | R, C, U |
| Add/Remove Liaison | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

UI Fields – Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-Agency)

* 1. UC6: ACCOUNT CREATION - EXTERNAL ORGANIZATION
     1. DESCRIPTION

This use case describes the process of creating account by an external organization.

* + 1. ACTORS
* An employee of an external organization - User
* DOT supervisor
* APA - System
  + 1. PRECONDITIONS
* User have APA URL.
* User has the list of documents required to create an organization. Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Documents)
  + 1. MAIN APPLICATION FLOW

1. User organization launches the APA portal.
2. User clicks on ‘Register Agency/External Organization’ button.
3. User will select private organization.
4. User provides required organization information.
5. User will add primary contact details – First Name, Last Name, email ID, Contact number.
6. User will select type of permit organization is interested in.
   1. NY State Disability Permit
   2. Annual On-Street
   3. Clergy
   4. Express Lane
   5. Highway Travel
   6. 9/11 Bus Parking
   7. Single Use on Street
   8. Street Travel
7. User will upload the required documents. Please refer to Appendix A - Data Dictionary (Tab: Documents).
8. User will submit information.
9. The flow ends.
   * 1. BUSINESS RULES

* Organizations can have only one account in APA i.e. every organization account will be unique. Uniqueness will be based on EIN/Tax Id number.
* DOT Supervisor will review the information/documents shared by user and will approve/reject the organization. Please refer to [Use Case 2.4 DOT Review Process](#UC4) for further details.
* Primary Contact is mandatory for organizations.
* Contact can view issued/rejected/in-progress application/ permits.
* Contact document verification is needed at the time of creation. DOT will manually verify all the information/documents.
  + 1. POST CONDITIONS

System will create a task for DOT Supervisor to review external organization information. DOT Supervisor can approve/reject the organization.

* + 1. ALTERNATE FLOWS
       1. AF1: ORGANIZATION ALREADY EXISIT IN SYSTEM
* If organization already exists in APA, system will give message “Organization already exists, please contact organization’s Primary contact.”
* If organization is under DOT review and someone tries to create account for same organization, system will give message “Organization account creation in under DOT review, please call DOT customer care for more information”.
  + 1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **DOT Coordinator** |
| --- | --- | --- |
| Account creation | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

UI Fields – Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-External Organization)

* 1. UC7: DIVISION CREATION - EXTERNAL ORGANIZATION
     1. DESCRIPTION

This use case describes the process of adding a division to an external organization.

* + 1. ACTORS
* Primary/Secondary Contact for external organization - User
* APA - System
  + 1. PRECONDITIONS
* Organization and primary/secondary contact account are already created in APA.
* Primary contact has the login credentials.
  + 1. MAIN APPLICATION FLOW

1. User launches the APA portal.
2. User will login into APA and will add – division and liaison and will upload required documents. Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-External Organization)
3. User will submit information.
4. System will create division/liaison.
5. System will send account setup email.
6. The flow ends.
   * 1. BUSINESS RULES
7. Divisions will be unique for an organization. Uniqueness will be determined on the basis of “Division Name + Division Address”
8. Organizations can add multiple divisions/ locations.
9. Primary/secondary contact can remove/change primary liaison.
10. DOT Supervisor will have ability to remove/add primary liaisons.
11. One user can be contact (primary/secondary) and liaison (primary/secondary) for multiple organizations/divisions.
12. Primary contact can add new (not in APA) or existing APA user as Primary Liaison. Please refer [use case UC1](#UC1) for new user and [use case UC8](#UC8) for existing user.
    * 1. POST CONDITIONS
13. System will send an email to approver/liaisons for account setup.
14. Liaisons can view issued/rejected/in-progress application/ permits for assigned division.
15. Primary liaison can make secondary liaison as Primary liaison and then new primary liaison can remove the old primary liaison.
    * 1. ALTERNATE FLOWS
         1. AF1: DELETE DIVISION

Primary/secondary contact can delete an existing division.

* + - * 1. BUSINESS RULES

1. Division can be deleted by Primary/secondary Contact.
2. Division should not have any active/expired permit.
3. Division should not have any application (saved/submitted/approved).
   * + - 1. POST CONDITIONS

System will delete the division and associated information.

* + 1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **Agency Contact** |
| --- | --- | --- |
| Add Division | Page | R, C, U |
| Add Liaison | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

UI Fields – Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-External Organization)

* 1. UC8: LIAISON FOR MULTIPLE AGENCIES OR ORGANIZATIONS
     1. DESCRIPTION

This use case describes the process of adding someone as primary/secondary liaison for more than one agency or organization.

* + 1. ACTORS
* Primary Contact – Agency/External Organization - User
* DOT supervisor
* APA - System
  + 1. PRECONDITIONS
* Agency/Organization and primary contact account are already created in system.
* Primary contact has the login credentials.
  + 1. MAIN APPLICATION FLOW

1. User launches the APA portal.
2. User will click on a division or will add a new division.
3. User will provide all below information to add a liaison (primary or secondary)–
   1. First Name,
   2. Last Name,
   3. Email ID (same email ID as used previously)
   4. Contact number
4. User will upload the required documents.
5. User will submit information.
6. System will add liaison.
7. The flow ends.
   * 1. BUSINESS RULES
8. The system shows a pop-up if any mandatory information is missing.
   * 1. POST CONDITIONS

Liaison gets a system generated notification about new association with another agency/organization by email.

* + 1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **Primary Contact** |
| --- | --- | --- |
| Add Division | Page | R, C, U |
| Add Liaison | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

UI Fields – Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-Agency, Account-External Organization).

* 1. UC9: TRANSFERRING ROLES - PRIMARY CONTACT TO SECONDARY CONTACT
     1. DESCRIPTION

This use case describes the process of transferring roles of primary contact to secondary contact.

* + 1. ACTORS
* Primary/Secondary Contact - User
* DOT supervisor
* APA - System
  + 1. PRECONDITIONS
* Organization /Agency and primary/secondary contact account created in the system.
* Secondary Contact is added for the organization / agency.
  + 1. MAIN APPLICATION FLOW

1. User launches the APA portal.
2. User will change role of secondary contact to primary contact.
3. User will upload the required documents.
4. User will submit information.
5. The flow ends.
   * 1. BUSINESS RULES
6. Primary contact change will be approved by DOT Supervisor. Please refer to use case [2.4 for DOT Review Process](#UC4).
7. Organizations can have only one primary contact. Primary contact can remove the secondary contact.
8. When DOT approves secondary contact as primary contact; role of existing primary contact will be changed to secondary contact.
9. Organization will share complete information with DOT every time primary contact is changed.
10. Primary contact is mandatory for every organization.
11. Primary contact document verification is needed at the time of creation. DOT will manually verify all the information/documents.
    * 1. POST CONDITIONS

* System will create a task for DOT Supervisor to approve the primary contact.
* Primary contact can manage organization. Following changes can be done while managing organization (please refer to [Appendix A - Data Dictionary](#DataDictionary) for editable fields details) –
  + Add division
  + Contact add/change
  + Liaison add/change
  + Approver add/change
    1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **Primary Contact** |
| --- | --- | --- |
| Update Role | Page | R, C, U |
| Add/Remove Secondary Contact | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

UI Fields – Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-Agency, Account-External Organization).

* 1. UC10: TRANSFERRING ROLES - PRIMARY LIAISON TO SECONDARY LIAISON
     1. DESCRIPTION

This use case describes the process of transferring roles of primary liaison to secondary liaison.

* + 1. ACTORS
* Primary Contact - User
* DOT supervisor
* APA - System
  + 1. PRECONDITIONS
* Organization /Agency and primary contact account created in the system.
* Division and primary liaison account created in the system.
* Secondary liaison is added for the division.
  + 1. MAIN APPLICATION FLOW
* User launches the APA portal.
* User will change role of secondary liaison to primary liaison.
* User will upload the required documents.
* User will submit information.
* The flow ends.
  + 1. BUSINESS RULES

1. Every division can have only one primary liaison.
2. When secondary liaison role is updated as primary liaison. Role of existing primary liaison will be changed to secondary liaison.
3. Primary liaison can add/remove the secondary liaison.
4. Liaison document verification is not needed at the time of creation but Primary contact will upload all required documents in the system.
   * 1. PERMISSIONS

Below are the security permissions for each type of actor.

Create-C, Read-R, Update-U, Delete-D, No Access-NA, All Permissions-A

| **Screen Navigation** | **Content Type** | **DOT Coordinator** |
| --- | --- | --- |
| Update Role | Page | R, C, U |
| Add/Remove Secondary Contact | Page | R, C, U |

* + 1. UI FIELD DESCRIPTIONS AND WIREFRAMES

Wireframes – WIP

UI Fields – Please refer to [Appendix A - Data Dictionary](#DataDictionary) (Tab: Account-Agency, Account-External Organization).

1. APPENDIX
   1. APPENDIX A – DATA DICTIONARY



* 1. APPENDIX B - NOTIFICATIONS

Email templates will be covered in Notification Use case document.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Notification** | **Description** | **Type** | **Mode** |
| 1 | Welcome Letter | On account creation | System Generated | Mail/Email |
| 2 | Change password | Password Change | System Generated | Mail/Email |
| 3 | Forgot password | Password Reset | System Generated | Mail/Email |
| 4 | Forgot username | Retrieve Username | System Generated | Mail/Email |
| 5 | Denial Letter | Account Rejected - Organizations | System Generated | Email |

* 1. APPENDIX C - DATA MIGRATION

Not applicable

1. ACTION ITEMS

* Need to identify editable fields for individual profile/organization –
  + Application review is in-progress?
  + Application review is not in-progress?
* Identify Inactive account purging process?
* Identify security questions management process?
* Address will be associated with applications/permit. Application/permit will show address used while submitting/printing. Do we still show the address history on UI?
* Integration – DoITT Address Validation API - Need to research validation options:
  + Auto populate address based on boroughs
  + Validate zip codes, etc.
* Need to identify Data Migration approach – Any individual/agency/organization data migration from ePermits or Clergy system?
* Need to address during the DOT Admin Use Case: What’s the plan to manage this list of permits?