

ATTACHMENT 18: SOLUTION DEMONSTRATION

Vendor Product Demonstration Script: The following demonstration scripts cover several of the mid-level requirements from EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS. Each provide detailed user stories and expected results to demonstrate the desired functionality of the proposed system.

Requirements numbered 11 - 15 will be added by DCC upon review of the Bidder responses for requirements which can be met out of the box. Evaluation criteria and scoring criteria are detailed in [SECTION 6.6. SOLUTION DEMONSTRATIONS EVALUATION](#) and +SECTION 6.6.1. FUNCTIONAL REQUIREMENTS DEMONSTRATION EVALUATION

1) Requirement #FL-159: The system shall allow a user to register or search a business entity using a Registration Number, FEIN, ITIN or SSN.

User Stories		Expected Results
1	Register a Business Using an Identifier: As a system user, I want to register a new business entity using a Registration Number, FEIN, ITIN, or SSN, so that the business can be created in the system without manually entering all details.	1. A new business entity record is successfully created in the system. 2. The provided identifier (Registration Number, FEIN, ITIN, or SSN) is: Stored securely and uniquely associated to the newly created business entity AND The system confirms successful registration to the user.
2	Search for an Existing Business Using an Identifier: As a system user, I want to search for an existing business entity using a Registration Number, FEIN, ITIN, or SSN, so that I can quickly locate and view an existing business record.	3. The system returns the correct business entity when a valid matching identifier exists AND If no matching record exists, the system displays a clear "No results found" message.
3	Prevent Duplicate Business Records: As a system user, I want the system to detect existing business entities during registration or search, so that duplicate business records are not created.	4. No duplicate business entity record is created when an identifier already exists. AND The system identifies the existing business entity using any matching identifier.

2) Requirement #FL-159: The system shall allow a user to register or search a business entity using a Registration Number, FEIN, ITIN or SSN.

1) Requirement #FL-159: The system shall allow a user to register or search a business entity using a Registration Number, FEIN, ITIN or SSN.

User Stories		Expected Results
1	Consultants with Multiple Profiles: As an external system user, I want to be able to create one or more registration profiles, so that I can support one or more business entities seeking consulting services to manage or assist with online applications and activities.	1. The external system user account can have more than one registration profile associated to it, and the newly created profile is stored and linked to the user. 2. Business entity has ability to add, edit or remove registered users associated to their online registration. AND Business entity has the ability to manage the permissions for each registered user associated to their online application.
2	Business Entity with multiple records: As an external user, I want to be able to create an online registration, so that I can apply for a license or manage my license activities for one or more of my licenses.	3. The user is granted access only to actions, data, and features permitted by their role(s) and business entity associations. 4. The user is able to create an online registration and create, view or update all activities for each of the associated records.

3) Requirement #FC-30: The system should display a dashboard showing the workload distribution across regions.

User Stories		Expected Results
1	View Workload Distribution Dashboard: As an internal users, I want a dashboard that shows workload distribution for license case management across regions, so that I can understand where work is concentrated.	1. The dashboard page loads successfully and displays workload metrics for case management grouped by region, status and assigned internal user. 2. Each region shown includes the defined workload measure(s) (e.g., item counts, open cases, tasks in queue), to reflect real-time data refresh rules.
2	Track Case Management: As an internal users, I want the ability to track and report on the following activities from start to end of a case lifecycle: Complaints, administrative action, illegal activities, violations, cite and fine, investigations and inspection, so that I can generate metrics reports.	3. All case lifecycle activities (Complaints, Administrative Actions, Illegal Activities, Violations, Cite and Fine, Investigations, and Inspections) are: a. Successfully captured and linked to a single case record b. Tracked from case initiation through final closure c. Each activity includes required metadata, such as: c.1 Activity type c.2 Status c.3 Assigned user/role

1) Requirement #FL-159: The system shall allow a user to register or search a business entity using a Registration Number, FEIN, ITIN or SSN.

- c. 4 Start date and end date (or timestamps)
- 4. The system maintains a complete, chronological audit trail of all activities associated with the case, based on recorded activities.

4) Requirement #FL-345: The system shall allow the application to be assigned to an analyst for each division in parallel so that the review process can begin for all Divisions.

User Stories

Expected Results

1

Assign Analysts in Parallel: As an internal user, auto assignment of an application to an analyst for each division and/or branch at the same time, so that all divisions and/or branches can begin review in parallel.

- 1. The application has an assigned analyst recorded for each applicable division and/or branch, in the applicable status.
- 2. Each division assignment is saved as a distinct assignment record (division/branch + analyst + timestamp + assigned by) with status based on current review in progress.

2

Single Deficiency Notice: As an internal users, I want one deficiency notice sent to the applicant or licensee, so that one unified email or letter is sent for remediation with all deficiencies found for each division/branch.

- 3. All deficiencies identified across all divisions/branches for the application or license are:
 - a. Consolidated into a single deficiency notice
 - b. Clearly grouped or labeled by division/branch within the notice
- 4. The notice includes:
 - a. All required remediation items
 - b. Clear instructions, deadlines, and submission requirements (if applicable)
 - c. Reference to the associated application or license number

5) Requirement #FG-61: The system shall allow internal users the ability to manage documents including sorting, archiving, applying statuses, editing and deleting.

User Stories

Expected Results

1

Document Sorting: As an internal user: I want the system to automatically sort documents based on selected criteria

- 1. The system automatically sorts the document list according to the selected attribute and sort direction (ascending or descending).

1) Requirement #FL-159: The system shall allow a user to register or search a business entity using a Registration Number, FEIN, ITIN or SSN.

	(e.g., name, date, status, category or type), so that documents are presented in an organized and consistent order without manual reorganization.	2. The system allows for the applicable status of a required document to be assigned.
2	Meta Data Document Category: I want the system to automatically detect and apply document metadata and assign a document category when a file is uploaded, so that documents are consistently categorized and can be easily searched and retrieved by category (e.g., Tax Form, Building Permit, Land Ownership Certification).	3. Upon successful document upload, the system has automatically extracted available metadata and applied system-defined document category to the document record. 4. After processing is complete, the document is indexed and retrievable through search and filtering by its assigned category (e.g., Tax Form, Building Permit, Land Ownership Certification).

6) Requirement #FG-71: The system shall have an external public license search feature for consumers to perform a search against any licensee in the system.

User Stories		Expected Results
1	Public License Search: As a member of the public, I want to search for a licensee using basic search criteria, so that I can determine whether a business or individual holds a valid license in the system.	1. After a search is submitted, the system displays a list of matching licensees based on the entered criteria (e.g., license number, business name, or individual name). 2. Each returned licensee record displays its current license status, expiration date and any public disciplinary actions taken, if any, (e.g., Active, Expired, Suspended) at the time the search is performed.
2	Public Online Compliant: As a member of the public, I want to search for a licensee using basic search criteria, so that I can submit an online complaint.	3. Once a licensee is selected from the search results, the system associates that licensee's identifier with the complaint workflow so the complaint form is pre-populated or linked to the selected licensee. 4. The system confirms successful online compliant submittal to the end user.

7) Non-functional Requirement# NF-AC-02: The system shall allow internal user to access from the field on mobile and handheld devices.

User Stories	Expected Results
--------------	------------------

1) Requirement #FL-159: The system shall allow a user to register or search a business entity using a Registration Number, FEIN, ITIN or SSN.

1	Mobile Access Field Work: As an internal user, I want to securely access the system from a mobile or handheld device while in the field, so that I can perform my job functions without returning to the office.	<p>1. When an internal user logs in from a supported mobile or handheld device, the system authenticates the user and grants access to the system without errors.</p> <p>2. After login on a mobile device, the user can access designated core system functions required for field work (as defined by role) using a mobile-optimized interface.</p>
2	Usability and Compatibility: As an internal user, I want the system interface to be usable on mobile and handheld devices, so that I can efficiently view and interact with information in field conditions.	<p>3. When accessed from a supported mobile or handheld device, the system renders a responsive interface where content is readable and primary actions are usable without horizontal scrolling.</p> <p>4. Key workflows behave consistently across desktop and supported mobile/handheld devices, with no loss of data or critical functionality due solely to device type.</p>

8) Requirement #FG-95: The system shall support modification of license types to conform with legislatively-mandated changes to fees, variable fee rules, expiration date assignment rules, eligibility rules, owner relationship requirements, and required licensing disclosures.

User Stories		Expected Results
1	License Configuration: As a system administrator, I want to modify configurable license attributes such as, fees, variable fee rules, expiration rules, and eligibility rules, so that the system can conform to legislatively-mandated changes without code changes.	<p>1. After changes are submitted, the system stores the updated license type configuration with an effective date (and retains prior versions for audit/traceability).</p> <p>2. Any new license application created after the effective date uses the updated fees, variable fee calculations, expiration assignment rules, and eligibility validation.</p>
2	Owner Relationship: As a system administrator, I want to update owner relationship requirements for a license type (e.g., required roles/relationships and validation rules), so that applications comply with new statutory ownership requirements.	<p>3. When an application is submitted for that license type, the system validates required owner relationships and prevents submission/approval if requirements are not met.</p>
3	Licensing Disclosures: As a system administrator, I want to modify required	<p>4. For applications of a license type, the system displays the current required disclosures and captures</p>

1) Requirement #FL-159: The system shall allow a user to register or search a business entity using a Registration Number, FEIN, ITIN or SSN.

licensing disclosures for each license type, so that applicants are presented with the legally required statements and acknowledgements.

the applicant's acknowledgement/attestation with current disclosure version accepted and date and time stamped.

9) Requirement #FG-64: The system shall provide internal and external AI features that improve user interactions, including suggesting email content, identifying potential data entry errors, identifying potential deficiencies and document image scanning.

User Stories

Expected Results

1	AI Quality Checks: As an internal or external user, I want the system to use AI to detect potential data entry errors, identify missing/deficient information, and improve document image scanning results, so that I can submit accurate, complete information with fewer rework cycles.	1. After a user enters data or uploads documents, the system flags potential errors/deficiencies (e.g., missing required fields, inconsistent values, unreadable scans) and provides suggested corrections or next steps. 2. Uploaded document images are processed to improve legibility and/or extract key information where supported, and the processed result (and any extracted fields) is attached to the record without overwriting the original upload.
2	AI User Communication: As an internal or external user, I want the system to suggest email/message content based on the context of my task, so that I can communicate faster and more consistently.	3. When a user requests assistance, the system generates a draft email/message relevant to the selected record/workflow, and the user can edit it before sending/copying. 4. The system does not send messages automatically; the user must explicitly confirm the final content, and the system records that AI assistance was used (e.g., "AI suggested draft generated") for audit/telemetry.

10) Requirement #FG-69: The system shall provide interactive geospatial visualization and analysis capabilities, including the ability to display and filter map features, present contextual information through tooltips, and support multiple visualization formats (e.g., boundaries, points, heat maps), with options for data review, approval, and export in multiple formats.

User Stories

Expected Results

1	Interactive Map Visualization and Filtering: As an internal or external user, I want to view system data on an interactive map with multiple visualization formats and filtering	1. The system displays geospatial data using supported visualization formats (e.g., boundaries, points, heat maps), and users can filter map features based on defined attributes. 2. When a user interacts with a map feature (hover,
---	--	---

1) Requirement #FL-159: The system shall allow a user to register or search a business entity using a Registration Number, FEIN, ITIN or SSN.

	options, so that I can analyze geospatial information and identify patterns or issues.	tap, or select), the system displays contextual information in a tooltip or detail panel relevant to that feature.
2	Geospatial Data Review, Approval, and Export: As an internal reviewer or system administrator, I want to review, approve, and export geospatial data displayed on the map, so that I can validate data quality and share information in supported formats.	3. When a user performs a review or approval action on geospatial data, the system records the action, user, timestamp, and status change. 4. The system allows the user to export selected or filtered geospatial data from the map in one or more supported formats (e.g., CSV, GeoJSON, Shapefile), and the exported file reflects the current map filters and visualization state.
11) TBD - State will review EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS for "OOB" responses and add for demonstration.		N/A
12) TBD - State will review EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS for "OOB" responses and add for demonstration.		N/A
13) TBD - State will review EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS for "OOB" responses and add for demonstration.		N/A
14) TBD - State will review EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS for "OOB" responses and add for demonstration.		N/A
15) TBD - State will review EXHIBIT A: FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS for "OOB" responses and add for demonstration.		N/A